PUBLIC WORKS COMMITTEE

October 1, 2020
3:00pm
Via Zoom Meeting

Meeting Access Information

This meeting is being held electronically via Zoom. The public may watch the live feed of the meeting on the City's Facebook page at https://www.facebook.com/cityofphilomath . This is a public page and does not require a Facebook account to access. Contact City Hall to make viewing arrangements if you do not have access to the internet.

Committee Members:	Councilors: Doug Edmonds, Chas Jones Chairman: Mayor Eric Niemann
Tree Board Members:	Rick Flacco, Lorri Hendon

----- Agenda Topics -----

Roll Call

Minutes – March 4, 2020

Tree Board Business –

- **Tree Removal Request-342 Robb Pl**
- **Request for Trees-612 N. 11th St**

Public Works Business –

- **Review And Discussion Regarding Draft Water SDC Methodology from Curran-McLeod Inc.**
- **Review And Discussion Regarding Draft Sewer SDC Methodology from Curran-McLeod Inc.**
- **Review And Discussion Regarding Draft Transportation SDC Methodology from Curran-McLeod Inc.**

Adjourn

Resource persons:	Kevin Fear, Public Works Director Garry Black, Public Works Operations Supervisor Chris Workman, City Manager Joan Swanson, Finance Director

NOTICE: Given 2 business days' notice, an interpreter will be made available for the hearing impaired or those with limited English proficiency. Contact person: Ruth Post, (541) 929-6148.

Philomath Public Works Committee
MINUTES
March 5, 2020

CALL TO ORDER:
Mayor Eric Niemann called the meeting to order at 3:00 p.m. in the Council Chambers at Philomath City Hall, 980 Applegate Street, Philomath, OR.

ROLL CALL:
City Councilors Chas Jones and Doug Edmonds and Mayor Eric Niemann (via teleconference). Staff: City Manager Chris Workman, Finance Director Joan Swanson, Public Works Director Kevin Fear, Public Works Operations Supervisor Garry Black, and City Recorder Ruth Post.

MINUTES:
MOTION: Councilor Jones moved, Councilor Edmonds second, to approve the minutes of February 6, 2020 as presented. Motion APPROVED 3-0 (Yes: Edmonds, Jones and Niemann; No: None).

TREE BOARD BUSINESS:
None.

PUBLIC WORKS BUSINESS:
Safety and Streetscapes Project Active Transportation Bike Route Option – Mr. Workman introduced Jenna Berman an active transportation specialist with ODOT. He summarized her involvement in bringing additional bicycle and pedestrian safety amenities to the Downtown Streetscapes plan. He described the efforts of Ms. Berman to develop a plan to include active transportation amenities in the scope of the streetscapes project. Ms. Berman distributed a handout describing the potential amenities that would be add to the streetscape and paving project (Supplemental Agenda Item). She reviewed the roadblocks that the current transportation system through Philomath creates for bikes and pedestrians and the new guidance that is coming out of ODOT to address such situations.

Ms. Berman reviewed the proposals already identified in the City's Transportation System Plan related to bike and pedestrian projects along the highway. She proposed shifting the alignment to create a separated bikeway on the south side of Applegate from 15th to 13th, then north to connect to Main. She explained the need for support from the community before moving from the conceptual stage to the detail and engineering stage.

There was discussion about the C2C hiking route through Philomath and the value of keeping bike and pedestrian traffic on the main thoroughfare to access businesses. There was discussion about the proposed 10 foot wide path with a 2-foot concrete buffer/curb.

Ms. Berman presented preliminary layouts showing the conceptual project designed within the existing right-of-way. She noted that these are preliminary layouts and there are still significant details to be determined. She provided examples of similar projects in other Oregon cities and elsewhere.

Ms. Berman described interactions with the ODOT Area Manager and other members of the Active Transportation team. There was discussion about cleaning and maintenance of paths like this.

Mayor Niemann questioned coordination of engineering efforts. Ms. Berman explained that ODOT would add money to the project and the engineering would be incorporated into the City's overall streetscape plans. She explained that her budget for the project would be $500,000 and be intended to cover the addition of the active transportation project amenities.

Councilor Jones questioned if additional lighting and reflectors would be added to ensure high visibility in that area. There was discussion about questions regarding lighting. There was discussion about the Applegate and 15th crossover from a safety perspective, including the potential for a rapid-flashing pedestrian-activated light to cross Applegate near McDonalds.

Ms. Berman reviewed assumptions and questions that would need to be addressed as identified in the handout. Mayor Niemann questioned the actual bike count already trafficking on Applegate and Main Street. Mr. Workman suggested that CAMPO has just purchased bike counting equipment. There was discussion about challenges in identifying existing routes. Ms. Berman noted the current route is an incomplete network for bicyclists.

Mr. Workman described an alternative route directing bike traffic north at 17th Street to use the existing crosswalk light. Ms. Berman described the issues related to bikes being placed on the two-way five-lane section of the highway. She described an alternative of moving the bike lane inside of the parked car lane that is being utilized in Portland but requires consistently heavy parking usage.

Ms. Berman described new standards for bike and pedestrian amenities. Councilor Edmonds requested to see more of the proposal with the streetscapes design. Ms. Berman described issues with the timeline for the overall project and her interjection into the project. There was discussion about the tight timeline involved. Mr. Workman described problems that are known to exist with current bike and pedestrian flow.

Councilor Jones suggested adding extension of the bike pathway on Applegate all the way to 15th Street. Ms. Berman agreed but noted that her constraints are limited to being adjacent to a state highway and there wouldn't be any state funding for that. There was brief discussion about the planter strips along the south side of Applegate from 15th to 13th. Ms. Berman described the differences between using a wider sidewalk and a separated bikeway path.

Ms. Berman reviewed other crossing improvements as included in the handout. She requested the Committee provide feedback about the proposed areas. Mayor Niemann added concerns about the crosswalk at 14th and Main exacerbated by the location of the bus shelter, and the lighted crossing at 16th and Main. Ms. Berman explained the 16th and Main intersection is outside of the streetscape project limits but an updated lighting pattern might qualify for a Safe Routes to School grant. Councilor Jones noted concerns about the crossing at 9th and Applegate. Mayor Niemann added the 9th and Main crossing striping. Ms. Berman explained the question is primarily for additional enhancements where there is not currently a light.

There was discussion about extension of bulbouts on Main to 7th Street to help control speeds. Councilor Edmonds described concerns about pedestrians walking on the highway shoulder from west of 53rd Street to the eastern city limits.

Ms. Berman suggested having her traffic engineers review the additional input from the Committee and developing estimates to provide additional opportunity for the Committee to weigh in. By consensus, the Committee provided initial support for the bikeway path. Mayor

Niemann suggested using one of the digital speed signs to gather speed data on the corner around McDonalds and the Credit Union.

MOTION: Councilor Edmonds moved, Councilor Jones second, to support the shifted bike path concept as presented. Motion APPROVED 3-0 (Yes: Edmonds, Jones and Niemann; No: None).

SDC Consultant Update – Mr. Workman described the proposals that were emailed out to the Committee from FCS Group and Curt McLeod. He requested feedback from the Committee regarding any additional information needed to reach a decision on a consultant.

Mr. Workman described the methodology presented by Mr. McLeod compared to the current methodology and the similar methodology FCS Group proposes. Councilor Jones questioned if Mr. Workman had more confidence in one consultant over the other. Mr. Workman stated he had no reservations about going with the less expensive option proposed by Mr. McLeod.

Councilor Edmonds described the differences he noted between the information provided by the two consultants and the major price-point difference between the two. There was discussion about the defensibility of the two approaches and the ability to explain them to developers. Mr. Workman recommended contracting with Mr. McLeod.

Mayor Niemann noted any new methodology would be an improvement over the current one. Mr. Workman described the age impact of the current methodologies and the conflict between the schedule and the current project lists. Mr. Workman described the end-result determination by the Council when implementing them and the impact of potential grant funding.

Mr. Workman described bringing the consultant in to determine which priority projects to include in the methodology within the intended timeframe.

MOTION: Councilor Jones moved, Councilor Edmonds second, to move forward with Curran-McLeod. Motion APPROVED 3-0 (Yes: Edmonds, Jones and Niemann; No: None).

Mr. Workman clarified that the final methodologies will go to the City Council for implementation. Councilor Jones noted that the 100% difference between the bids was a substantial factor in reaching his decision.

CIP Equipment Improvement Schedule – Ms. Swanson explained that the facility and equipment schedules were inadvertently not included in last month's packet. Mr. Black reviewed the equipment recommended for replacement in the coming year. He described the repair issues that are escalating on the vac truck and the recommendation to replace it a year early. There was discussion about the repair issues related to the vac truck. Mr. Black described the critical need for the vac truck and the concerns when it needs to go in for repair. He noted that replacement of the dump truck has been moved out farther. He described the addition of a Park Fund equipment schedule to begin saving for equipment needs there. He noted the repurposing of the truck that was replaced last year and is now used as the flower basket watering truck.

Councilor Jones questioned the maintenance costs associated with the pickups to be replaced.

CIP Facility Replacement Schedule – Ms. Swanson reviewed the new schedule format for the facilities schedule to put more emphasis on expected needs and less on saving for overall building replacement. She described the space needs for city hall with a schedule aimed at

accomplishing a remodel in four to five years. Mr. Workman described additional storage and office space needs. There was discussion about creating a plan, committing to saving the funds, and moving forward with it.

Ms. Swanson noted there were no change anticipated in the police building schedule. She described the needs for additional space at the library, along with the floodplain issues. She noted a five year timeframe for that project. There was discussion about the space constraints at the library. There was discussion about the city owning the building and the library district operating the facility. There was discussion about grant funding availability for the library. There was discussion about planning being in the early stages and the different expansion options that have been considered over recent years. Mr. Workman explained he has reached out to the library leadership for a preliminary meeting.

Mayor Niemann described the correlation between population growth and increased library use.

Ms. Swanson noted the facilities schedule for Public Works has not changed. She emphasized the importance of the approved CIP being funded in the budget process.

Councilor Jones recommended holding off on the replacement of the GMC Canyon from the water equipment schedule. Ms. Swanson stated that Mr. Fear and Mr. Black make a practice of holding off on replacement of a vehicle whenever they can; but when they suggest it needs to be replaced, they are typically correct. There was discussion about the Canyon being 10 years old and having two vehicles needing to be replaced next year.

Mr. Workman explained the correlation between the Strategic Plan goals and General Fund Fee goals to fund the CIP. He described the importance of keeping the goals as they were presented to the public.

It was agreed that the two additional schedules should be moved to the City Council with the previously approved CIP.

(Councilor Edmonds left at 4:50 p.m.)

Other Business – Mayor Niemann touched on ongoing efforts to resolve the visual conflict between the summer flower baskets and the military banners hung from the acorn light poles.

Mayor Niemann adjourned the meeting at 4:52 p.m.
Meeting recorded by Ruth Post, MMC, City Recorder

DRAFT

Philomath Tree Board
Agenda Item Summary

Title/Topic: Removal of trees on 2700 Block of Applegate Street

Meeting Date: June 4, 2020
Department: Public Works

Staff Contact: Garry Black
Email: garry.black@philomathoregon.gov

ISSUE STATEMENT
Shall the Philomath Tree Board Committee approve the removal of apple trees along the 2700 block of Applegate Street.

BACKGROUND
A citizen requested that two apple trees along the 2700 block of Applegate Street be removed due to the mess that they create along his property line and in his back yard. The apples also attract yellow jackets that have been an issue for years.

The homeowner at 342 Robb Place has offered to replace the trees directly adjacent to his property.

Financial Impact
Cost of removing the trees will be minimal.

TREE BOARD OPTIONS
1. Approve the recommendation that staff has presented.

2. Do not approve the removal of said trees.

STAFF RECOMMENDATION
Remove the trees.

RECOMMENDED MOTION
I MOVE THAT PUBLIC WORKS REMOVE THE TREES.

ATTACHMENTS
Pictures and citizen letter of support

To: Garry Black, Philomath Public Works
From: Patrick McDonald

I live at 342 Robb Pl and I bought this house in 2012. My back fence runs along Applegate Street and there are currently 3 shrubs/small trees that were planted on that easement before I purchased my house. Two of them bear a combination of berry and apples and the third is a plum tree.

I do my best in the fall to pick up all the fallen fruit, but in the last couple years they have become quite prolific in their fruit production. They attract yellow jacket hornets and I see evidence of rat and raccoon activity as well as they are attracted to the food source. A lot of foot traffic occurs on Applegate and these fruit bearing trees create a bit of a hazard and mess for the pedestrians. As the apples ripen they do tend to bust limbs that end up on the sidewalk.

The plum tree is less messy, but it still creates an unsightly and sticky mess in the summer. Several limbs are growing over my property line.

I am requesting that the city of Philomath consider taking these shrubs/small trees out. I am willing to not only work with the city to defray any cost, but also know that tree coverage is important and want to replace any tree that is removed with an appropriate tree (something that doesn't bear fruit). I know a tree lined sidewalk beautifies the city.

Thank you for the consideration and feel free to contact me with any questions or concerns.
Phone: 541-908-1974

Sincerely,

Patrick J McDonald

Philomath Tree Board
Agenda Item Summary

Title/Topic: Tree request at 612 N 11th Street

Meeting Date: June 4, 2020
Department: Public Works

Staff Contact: Garry Black
Email: garry.black@philomathoregon.gov

ISSUE STATEMENT
Shall the Philomath Tree Board Committee approve the planting of two street approved trees in the planter strip at 612 N 11th Street?

BACKGROUND
Mr. Antriasian at 612 N 11th Street has requested that the city provide and plant two trees in front of his residence.

Financial Impact
Estimate to purchase and plant two street approved trees.

TREE BOARD OPTIONS
1. Approve the request that staff has presented.

2. Do not approve the request that staff has presented

STAFF RECOMMENDATION
By approving the request, a precedence will be established and the city does not have the budget now or in the future to honor all the requests for trees and planting. Staff does not support this request due to that fact.

RECOMMENDED MOTION

ATTACHMENTS
Estimate

CITY OF PHILOMATH
PUBLIC WORKS

To: Kevin Fear, Public Works Director

From: Garry Black, Operations Supervisor

Date: 5/20/2020

Re: Tree Request

Kevin:

I received a request from a Mr. Antriasian who lives at 612 N 11th Street for a recommendation for trees to plant in the planter strip in front of his residence. I directed the city arborist to meet with him and give him some recommendations. Mr. Antriasian sent me a follow up email requesting that he would like to have the city plant two trees in front of his home. His request included two trees that are not on our approved street tree list. One is a fruit-bearing tree that we do not allow in the planter strip. I followed up with an email letting him know that there was a process that needed to be followed also that the city only had a limited amount of resources and that all requests must go through the tree board committee.

I am now forwarding this request to the tree board committee.

Tree Purchase	$150-$200
Supplies	$80
Labor	$80
	$310-$360

DRAFT
City of Philomath

WATER SYSTEM DEVELOPMENT CHARGE (SDC) & CAPITAL IMPROVEMENT PLAN UPDATE

Benton County, Oregon

August 2020

CURRAN-McLEOD, INC., CONSULTING ENGINEERS
6655 SW Hampton Street, Suite 210
Portland, Oregon 9722

City of Philomath

WATER SYSTEM DEVELOPMENT CHARGE (SDC) & CAPITAL IMPROVEMENT PLAN UPDATE

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City of Philomath

WATER SYSTEM DEVELOPMENT CHARGE METHODOLOGY & CAPITAL IMPROVEMENT PLAN

August 2020

OVERVIEW

This update of the City of Philomath Water System Development Charge (SDC) is intended to summarize the current value of the water source, treatment, distribution and storage systems that serve existing users, to document the estimated costs of capital improvements required to serve future users, and to develop an equitable, proportionate allocation of these values and costs to all users, current and future. The goal of this effort is to update the existing SDC methodology to ensure it is understandable, defensible, and equitable to both the existing and future users of the system.

The City of Philomath first adopted a System Development Charge for all capital improvements in Resolution 94-18, with the initial water SDC established as $1,446 per single family residential unit. In 2004, the City updated the Water System Master Plan, and subsequently updated the Water SDC methodology and fee. That fee is increased annually, since 2004, in accordance with the ENR construction cost index. The current 2020 fee is $9,616 per EDU.

SDC METHODOLOGY OVERVIEW

Oregon Revised Statutes 223.297 through 223.314 provides the statutory basis for application of System Development Charges. These statutes are intended to provide a uniform framework for development of equitable funding to support orderly growth.

According to the statute, SDCs are composed of:

- Reimbursement Fees to address the value of existing improvements,
- Improvement Fees to address the cost of needed future improvements, or
- Combination of both Reimbursement and Improvement Fees.

The statutes in ORS 223 permit the reimbursement fee to be based on the "value" or "cost" of the existing systems. This 2020 update uses the current "replacement value" for all existing system improvements, less grants, contributions, and existing debt, to establish the basis of the Reimbursement Fee. The basis for the Improvement Fee is the estimated cost of the capital improvements identified in the 2018 Water System Master Plan.

For a reimbursement fee, the City's current methodology uses a present value of the water distribution lines within an approximate 40-block City core area and included no value on the existing source, treatment, or storage systems due to limited capacity.

Common to all of the municipal utilities, the existing infrastructure has components with surplus capacity for future users, as well as some areas of deficiencies or inadequacies in serving the existing users. Similarly, projects on the Capital Improvement Plan listing are required to provide capacity for future users, but also frequently resolve deficiencies in service to the existing users. To account for the available capacity in the City's infrastructure and the concurrent need to undertake capital improvements to resolve deficiencies, this SDC Methodology includes a combination of both Reimbursement Fees and Improvement Fees.

The existing infrastructure essentially provides a base level of service to serve current and future users, whereas the required capital improvements provide resolution of existing deficiencies, as well as the expansion needed to serve future users. To address these issues and provide an equitable allocation of costs, the value of all existing facilities and the estimated cost of all future improvements are allocated to all users, current and future equally, based on the UGB buildout number of EDU. This method of allocating costs to all users ensures that the charge to future connections is equitable and that it is no more than the proportionate cost allocated to each existing user.

This methodology avoids double charging for capacity and is also independent of current population. With this approach, there is no need to identify percentage of remaining capacity to serve future users, nor to estimate future population growth. This allocation is dependent only upon the value of the existing facilities, the estimated cost of the required future facilities and the capacity of each.

The values placed on the existing improvements have taken into consideration rate-making principles and the impacts of inflation, contributions by existing users, gifts or grants to the City to construct the infrastructure, the current condition of existing facilities, and any outstanding debt. The City of Philomath currently has no water system debt.

Population projections are useful to anticipate future needs; however, the rate of growth to reach the projected population does not impact the fee calculations. The fee is based on funding the needed improvements to support growth, independent of when that population growth is realized. In periods of accelerated growth, SDC revenues will accrue more quickly to allow undertaking needed improvements earlier. In periods of low growth, revenues will accrue more slowly, but the need for infrastructure improvements to support this growth is also protracted.

ANNUAL ADJUSTMENTS

As permitted by ORS 223.304(8): 1) adopted SDC fees may be adjusted as needed, based upon changes in the cost of materials, labor or real property applied to projects or project capacity as set forth in the associated systems' CIP; or 2) adopted SDC fees may be increased periodically based upon application of a specific cost index.

The statutes require an adopted cost index to be:

(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 date 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.

The Engineering News Record (ENR) publishes a nationwide 20-city average cost escalation factor called the Construction Cost Index (CCI) that satisfies the criteria in this statute. The use of this 20-city average provides a well-established and well-known industry standard for the average change in construction costs. The current ENR CCI for July 2020 is 11,439.

In accordance with ORS 223.309(2), the City may adjust any of the capital improvement projects, adjust project cost estimates, or values of existing improvements by resolution or ordinance at any time. However, if the SDC is increased as a result of the addition of a new "capacity increasing capital improvement" project, the City must provide a written notice, a minimum of 30 days prior to adoption of the modifications, ***to persons who have requested notice under ORS 223.304(6).*** Subsequently, the City must hold a public hearing for adoption only if, within seven days of the proposed adoption, the City receives a written request for a hearing.

If the City elects to modify the cost allocation methodology as opposed to only adjusting the project values or CIP inventories, written notice is required to be mailed 90 days prior to any adoption hearings ***to all persons who have requested notification under ORS 223.304(6).*** Additionally, the revised methodology must subsequently be made available for public review a minimum of 60 days prior to the hearing for adoption.

If no persons are listed per ORS 223.304(6), then no advance notification is required for adjustments, other than those required for any public meeting.

CREDITS FOR ELIGIBLE CONSTRUCTION

ORS 223.304(4) requires that a method of credits be available for the construction of qualified public improvements. The statute further defines qualified public improvements as those required as a condition of development approval, identified in the plan and list adopted pursuant to ORS 223.309 and either:

(a) Not located on, or contiguous to, property that is the subject of development approval; or,

(b) Located in whole or in part on, or contiguous to, property that is the subject of development approval and required to be built larger, or with greater capacity, than is necessary for the particular development project to which the improvement fee is related.

As a result of ORS 223.304(4) (a), a credit must be provided for eligible off-site public improvements; and in accordance with ORS 223.2304(4) (b), a credit must be provided for on-site development for the component of an eligible improvement which has capacity greater than the local government's minimum standard facility size or capacity.

The following table summarizes the construction cost estimates based on the estimates in the Water Master Plan. These include 35% for engineering, legal, administration and contingency, adjusted to the current ENR CCI index, and exclude any cost for service laterals. These estimates are used to establish a value on existing oversize pipelines improvements:

CITY OF PHILOMATH
VALUE OF WATER SYSTEM CONSTRUCTION CREDITS
July 2020 ENR CCI 11,439

LINE SIZE	*8"*	*10"*	*12"*	*16"*
CONSTRUCTION COST	$160/lf	$185/lf	$200/lf	$230/lf
OVERSIZE CREDIT	$0	$25/lf	$40/lf	$70/lf

The value of credits provided to developers for construction of eligible improvements are based on actual cost. Credits are used to offset the SDC fees due from the developing property. In the event the credit exceeds the fees due from the development, the City will provide a credit against future development. ORS 223.304(5)(d) states credits must be used within 10 years. However, ORS 223.304(5)(c) allows the City to adopt credit provisions beyond the credits required by statute, if so desired.

When growth pressures mandate the City make improvements within fully-developed areas or unrelated to any specific development, the entire cost of the improvement may be funded with SDC revenues. If the improvement will provide service to undeveloped areas, the SDC expenditure should be reimbursed through an Advance Financing cost allocation or an SDC overlay covering the developable area.

CREDIT FOR PRE-EXISTING USE

A system development charge is imposed on all new construction, or when a change of use on a parcel increases the demand on the utility. In the event of a change of use, the system development charge for the new use shall be offset by a credit in the amount of the calculated system development charge for the pre-existing use. The adjustment may not reduce the SDC charges to result in a refund.

The City of Philomath policy is that if an existing service is discontinued, after 24 months it will be considered abandoned and no SDC credit for pre-existing use is provided to future redevelopment of the property.

SDC ADMINISTRATION REQUIREMENTS

Per ORS 223.311, System Development Charge revenues must be deposited in accounts designated for SDC revenues for each infrastructure. An annual accounting must be prepared by January 1 of each year, identifying amounts collected for each utility, the projects that were funded and the amount of revenues collected to administer the SDC in the previous ***fiscal year***.

The statute allows Reimbursement Fees to be expended on any capital improvements or associated debt service within the subject infrastructure. Improvement Fees may only be spent on projects that are included in a listing of eligible capital improvements planned to be funded with SDC revenues. Eligible projects include projects that increase capacity or level of performance on existing facilities, and associated debt service.

Oregon Revised Statutes 223.307(5) also allows SDC revenues to be expended for costs of complying with the provisions of the SDC statutes contained in ORS 223.297 to 223.314, including the costs of administration, and providing annual accounting of development charge expenditures. Accordingly, a 2% surcharge is added to each identified fee to account for the cost of administration.

Annually, a transfer from each SDC fund in the amount of the 2% of the annual collections may be made to the City department completing the administration for calculations, collections, accounting, and annual fee adjustments. This transfer should be identified in each annual summary.

REVIEW PROCEDURE

Adoption of this System Development Charge Methodology and Capital Improvement Plan includes the adoption of an administrative review procedure for the methodology, expenditures, and fee calculation.

Per ORS 223.304(7) (b) the SDC Methodology may be contested within 60 days of adoption in accordance with the procedure established in ORS 34.010 to 34.100. A challenge of any SDC expenditure must be made in accordance with the procedures defined in ORS 34.010 to ORS 34.100, and may be filed within 2 years of the SDC revenue expenditure.

If a private developer objects to the calculation of a system development fee, the City will take into consideration a utility impact analysis prepared specifically for the development that substantiates the demand on the infrastructure. The subsequent formal conclusion by the City may be contested through the procedures established in ORS 34.010 to ORS 34.100 for a writ of review. To avoid project delays, in the case of a contested fee calculation, the SDC fee payment shall be made as a deposit pending the formal review and outcome, at which time additional fees may be assessed or a refund provided.

EQUIVALENT DWELLING UNIT (EDU) DEMAND

An Equivalent Dwelling Unit (EDU) is defined as the demand placed on the water system by a single-family residential unit, which is served by a 5/8" x 3/4" water service meter.

The 2018 Water System Master Plan identified average daily demands as 106 gallons per day per capita although this figure included industrial/commercial/other demands. Metered sales records indicate residential demands comprise 70% of all water sales, with commercial, industrial, and other uses representing 30% of water demands. Average day demand per capita would actually be 70% of 106 gpd, or 75 gpd per capita. Based on the peaking factor identified in the Master Plan, Peak Day Demand would equal to 2.34 times 75 gpd, or 175 gpd per capita.

Based on the US Census Data in the American Communities Survey, the average household size in Philomath is 2.64 persons. The peak day demand per Equivalent Dwelling Unit (EDU) using 2.64 persons per EDU and 175 gpd per capita equals 460 gallons per day per EDU (gpd/EDU).

Source, treatment, and storage facility's ability to serve the community can be determined simply by dividing the facility capacity by the peak day demand per EDU. Distribution system capacities are defined by a geographical service area. The distribution system provides the backbone for expanding the system throughout the Urban Growth Boundary. As a result, cost allocations for distribution system improvements are based on the number of EDUs calculated at build-out of the UGB area.

The 2018 Water System Master Plan projected complete buildout of the Philomath Urban Growth Boundary to contain a population of 7,383. At 2.64 persons per household, the buildout of the UGB will contain 2,797 residential EDU. The Commercial/Industrial/other components add an additional 43% (.30/.70) or an additional 1,200 EDU, resulting in a total of approximately 4,000 EDU at buildout of the UGB.

REIMBURSEMENT FEE ASSET SUMMARY

The Reimbursement and the Improvement Fees include the replacement value of existing improvements and the estimated costs of needed future improvements allocated proportionally to all users. This methodology equitably accounts for excess capacity, as well as various system deficiencies, by allocating the value of existing improvements (in the Reimbursement Fee) and the cost of all needed improvements (in the Improvement Fee) over the total of all existing and future users. This ensures the charge to future users is no more than the allocation to existing users. Total capacity is by design to serve 7,383 population, which equates to an estimated 4,000 EDU, at buildout of the current UGB.

The Reimbursement Fee is intended to quantify the value of all existing improvements available to serve existing and future demands. The following table lists the replacement value of each component of the system, based on the July 2020 ENR CCI of 11,439. Values are adjusted to account for current condition, to exclude grants and principle forgiveness, and to remove any outstanding debt serviced with rate revenues.

The total value of existing improvements comprises a base level of service to serve all EDU through buildout of the UGB. This base value is then divided by the total estimated 4,000 EDU at buildout.

CITY OF PHILOMATH
WATER SYSTEM DEVELOPMENT CHARGE
REPLACEMENT COST OF EXISTING ASSETS
July 2020 ENR CCI 11,439

No.	*Project Description*	*Estimated Replacement Value*	*Estimated Grant/Loan/ Developers*	*Net SDC Value*	*EDU Capacity*	*SDC Cost Per EDU*
SOURCE FACILITIES:						
1	Water Rights, 7.03 CFS	$100,000	0	$100,000	4,000	$25
2	9th Street Well Source	300,000	0	300,000	4,000	75
3	11th Street Well Source	400,000	0	400,000	4,000	100
4	Corvallis Intertie	800,000	0	800,000	4,000	200
TREATMENT:						
5	Marys River Intake & PS	$800,000	0	$800,000	4,000	$200
6	Marys River WTP, 1 MGD	2,500,000	0	2,500,000	4,000	625
7	High Service Pump Station	400,000	0	400,000	4,000	100
8	WTP Site, 2.3 Acres	230,000	0	230,000	4,000	58
STORAGE:						
9	Neabeack Hill Res, 1.25 MG	$2,000,000	0	$2,000,000	4,000	$500
DISTRIBUTION:						
10	10" Oversize Pipe, 3,700 lf	$92,500	0	$92,500	4,000	$23
11	12" Oversize Pipe, 26,100 lf	1,044,000	0	1,044,000	4,000	261
12	14" Oversize Pipe, 1,200 lf	66,000	0	66,000	4,000	17
13	16" Oversize Pipe, 3,700 lf	259,000	0	259,000	4,000	65
PLANNING:						
14	Master Plan, WCMP, SDC	$120,000		$120,000	4,000	$30
	TOTAL	**$9,111,500**	**$0**	**$9,111,500**	**Total**	**$2,278**

WATER SDC REIMBURSEMENT FEE CALCULATION

The Reimbursement Fee is the total of the value of each water system component per EDU listed above.

SDC Reimbursement Fee= $2,278 per EDU

WATER SYSTEM CAPITAL IMPROVEMENT PLAN

The following table contains the Capital Improvement Plan for future improvements identified in the 2018 Master Plan:

CITY OF PHILOMATH
WATER SYSTEM CAPITAL IMPROVEMENT PLAN
ESTIMATED COST OF CAPITAL IMPROVEMENTS
July 2020 ENR CCI 11,439

*No.**	*Project Description*	*Priority*	*Total Estimated Cost**	*Estimated Grant/Loan/ Developers*	*Net SDC Cost*	*EDU Capacity*	*SDC Cost Per EDU*
T-1	WTP Improvements	1	$9,400,000	$0	$9,400,000	4,000	$2,350
ST-1	1.5 MG Storage Reservoir	1	3,000,000	0	3,000,000	4,000	750
S-4	9th Street Well Improvements	1	130,000	0	130,000	4,000	33
ST-2	Neabeack Hill Res Rehab	1	350,000	0	350,000	4,000	88
S-1	Faxon Water Rights Transfer	1	16,000	0	16,000	4,000	4
T-2	WTP Decommissioning	1	55,000	0	55,000	4,000	14
D-1	N 16th St Water, 300' of 10"	1	100,000	0	100,000	4,000	25
D-2	17th St Water, 600' of 10"	1	200,000	0	200,000	4,000	50
D-3	N 19th St Water, 300' of 10"	1	85,000	0	85,000	4,000	21
D-8	S 19th St Water, 1,300' of 10"	1	490,000	0	490,000	4,000	123
D-9	School Water, 350' of 8" & 1,700' of 10"	1	480,000	0	480,000	4,000	120
P-1	Neabeack Hill Domestic PS	1	21,000	0	21,000	4,000	5
SUBTOTAL PRIORITY 1			**$14,327,000**	**$0**	**$14,327,000**	**---**	**$3,582**
D-4	N 19th St Water, 600' of 12"	2	$175,000	0	$175,000	4,000	$44
D-5	Applegate St Water, 800'-10"	2	250,000	0	250,000	4,000	63
D-6	S 20th S Water, 350' of 10"	2	105,000	0	105,000	4,000	26
D-7	S 13th St Water, 950' of 10"	2	285,000	0	285,000	4,000	71
D-10	Newton/Green, 2,200' of 12"	2	685,000	0	685,000	4,000	171
D-11	N 8th St Water, 1,150' of 8"	2	450,000	0	450,000	4,000	113
D-12	N 9th St, 1,300'-8", 500'-12"	2	490,000	0	490,000	4,000	123
D-13	N 11th St Water, 1,000' of 12"	2	325,000	0	325,000	4,000	81
S-2	Marys River Rights Perfection	2	10,500	0	10,500	4,000	3
S-3	Faxon Intake & Transmission	2	3,500,000	0	3,500,000	4,000	875
S-5	11th Street Well Testing	2	18,000	0	18,000	4,000	5
S-6	11th Street Well ASR	2	305,000	0	305,000	4,000	76
S-7	11th Street Well Transmission	2	720,000	0	720,000	4,000	180

P-2	Neabeack Hill Fire PS	2	570,000	0	570,000	4,000	143
P-3	Starlight Village PS	2	1,000,000	0	1,000,000	4,000	250
SUBTOTAL PRIORITY 2			**$8,888,500**	**$0**	**$8,888,500**	**---**	**$2,222**
D-14	N Trans Main, 19,600' of 12"	3	4,540,000	$3,178,000	1,362,000	4,000	$341
D-15	S Trans Main, 11,200' of 10"	3	2,370,000	1,659,000	711,000	4,000	178
D-16	Starlight Village 4,600' of 12"	3	1,050,000	525,000	315,000	4,000	79
D-17	Marilyn Drive, 700' of 8"	3	190,000	189,905	57,000	4,000	14
SUBTOTAL PRIORITY 3**			**$8,150,000**	**$5,551,905**	**$2,445,000**	**---**	**$611**
G-1	Upsize and Oversize Pipelines	1	**$500,000**	0	**$500,000**	4,000	$125
G-2	Master Planning & SDC Update	1	**$50,000**	0	**$50,000**	4,000	$13
		Total	**$31,415,500**	**$5,551,905**	**$25,710,500**	**Total**	**$6,553**

* Project Numbers and costs are from the 2018 Water Master Plan CIP, adjusted to the current ENR CCI.

** All priority 3 projects are based on 30% of the cost funded by the SDC to account for the oversized component and improvements across existing developed properties

WATER SDC IMPROVEMENT FEE CALCULATION

The Improvement Fee is the total of the cost per EDU of each CIP project listed above

SDC Improvement Fee = $6,553 per EDU

WATER SDC FEE SUMMARY

All residential units, single family, multi-family and auxiliary dwelling units (ADU), are assigned one EDU per dwelling unit which is based on 2.64 people and 175 gpcd Peak Day Demand. Commercial/Industrial/Wholesale service charges are based on EDU factor listed for the peak capacity based on the size of the service meters. All SDC costs also include a compliance charge of 2% for staff review, fee calculation, fee collection and accounting requirements.

CITY OF PHILOMATH

WATER SYSTEM SDC FEE SCHEDULE

July 2020 ENR CCI 11,439

	EDU Factor	*Reimbursement Fee*	*Improvement Fee*	*Admin Fee 2%*	*Total SDC*
Single / Multi-Family / ADU Residential Per Dwelling Unit:					
Per Unit	1	$2,278	$6,553	$177	**$9,008**
Commercial / Industrial Development Based on Meter Capacity:					
5/8" Meter	1	$2,278	$6,553	$177	**$9,008**
3/4" Meter	1	$2,278	$6,553	$177	**$9,008**
1" Meter	1.42	$3,235	$9,305	$251	**$12,791**
1 1/2" Meter	2.4	$5,467	$15,727	$424	**$21,618**
2" Meter	3.84	$8,748	$25,164	$678	**$34,589**
3" Meter	7.76	$17,677	$50,851	$1,371	**$69,899**

DRAFT
City of Philomath

SANITARY SEWER SYSTEM DEVELOPMENT CHARGE & CAPITAL IMPROVEMENT PLAN UPDATE

Benton County, Oregon

August 2020

CURRAN-McLEOD, INC., CONSULTING ENGINEERS
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Portland, Oregon 9722

City of Philomath

SANITARY SEWER SYSTEM DEVELOPMENT CHARGE & CAPITAL IMPROVEMENT PLAN UPDATE

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City of Philomath

SANITARY SEWER SYSTEM DEVELOPMENT CHARGE METHODOLOGY & CAPITAL IMPROVEMENT PLAN

August 2020

OVERVIEW

This Sanitary Sewer System Development Charge (SDC) Update for the City of Philomath is intended to summarize the value of the existing wastewater system and estimated cost of needed improvements, and to define a method to equitably allocate those values to all users. As with all methodologies, the goal of this effort is to update the existing methodology to ensure it is understandable, defensible, and equitable to both the existing and future users of the system.

The City of Philomath first adopted a System Development Charge for all capital improvements in Resolution 94-18, with the initial Sanitary Sewer SDC established as $1,114 per single family residential unit. In 2004, the City updated the Sewerage System Facilities Plan and subsequently the SDC methodology to increase the fee to $5,247. That fee is increased annually since 2004 in accordance with the ENR construction cost index. The current 2020 fee is $8,829 per EDU.

In 2017 the City updated the Wastewater System Facilities Plan and provided an updated Capital Improvement Plan. This 2020 System Development Charge Update incorporates the current Wastewater Capital Improvement Plan to support continued growth of the City.

SDC METHODOLOGY OVERVIEW

Oregon Revised Statutes 223.297 through 223.314 provides the statutory basis for application of System Development Charges. These statutes are intended to provide a uniform framework for development of equitable funding to support orderly growth.

According to the statute, SDCs are composed of:

- Reimbursement Fees to address the value of existing improvements,
- Improvement Fees to address the cost of needed future improvements, or
- Combination of both Reimbursement and Improvement Fees.

The statutes in ORS 223 permit the reimbursement fee to be based on the "value" or "cost" of the existing systems. Similar to the 2004 methodology, this 2020 update uses the current "replacement value" for all existing system improvements, less grants, contributions and existing debt, to establish the basis of the Reimbursement Fee. The basis for the Improvement Fee is the estimated cost of the capital improvements identified in the 2017 Wastewater System Facilities Plan.

For the value basis of the current reimbursement fee, the City's methodology included one-third of the value of a portion of the existing collection system lines that had capacity to serve future users. The calculated value was allocated to future growth only, estimated at 900 Equivalent Dwelling Units (EDU). No value was placed on the existing treatment or disposal facilities due to limited capacity.

Common to all of the municipal utilities, the existing infrastructure has components with surplus capacity for future users, as well as some areas of deficiencies or inadequacies in serving the existing users. Similarly, projects on the Capital Improvement Plan listing are required to provide capacity for future users, but also frequently resolve deficiencies in service to the existing users. To account for the available capacity in the City's infrastructure and the concurrent need to undertake capital improvements to resolve deficiencies, this SDC Methodology includes a combination of both Reimbursement Fees and Improvement Fees.

The existing infrastructure essentially provides a base level of service to serve current and future users, whereas the required capital improvements provide resolution of existing deficiencies, as well as the expansion needed to serve future users. To address these issues and provide an equitable allocation of costs, the value of all existing facilities and the estimated cost of all future improvements are allocated to all users, current and future equally, based on the number of EDU served by the improvements. This method of allocating costs to all users ensures that the charge to future connections is equitable and that it is no more than the proportionate cost allocated to each existing user.

This methodology avoids double charging for capacity and is also independent of current population. With this approach, there is no need to assume a percentage of remaining capacity that is available to serve future users, nor to estimate future population growth. This allocation is dependent only upon the value of the existing facilities, the estimated cost of the required future facilities and the EDU capacity of each.

The values placed on the existing improvements have taken into consideration rate-making principles and the impacts of inflation, contributions by existing users, gifts or grants to the City to construct the infrastructure, the current condition of existing facilities, and any outstanding debt.

The City of Philomath currently has a bonded debt for the sanitary sewer system with a current balance of $4,560,400, scheduled to be retired in 2033.

Population projections are useful to anticipate future needs; however, the rate of growth to reach the projected population does not impact the fee calculations. The fee is based on funding the needed improvements to support growth, independent of when that population growth is realized. In periods of accelerated growth, SDC revenues will accrue more quickly to allow undertaking needed improvements earlier. In periods of low growth, revenues will accrue more slowly, but the need for infrastructure improvements to support this growth is also protracted.

ANNUAL ADJUSTMENTS

As permitted by ORS 223.304(8): 1) adopted SDC fees may be adjusted as needed, based upon changes in the cost of materials, labor or real property applied to projects or project capacity as set forth in the associated systems' CIP; or 2) adopted SDC fees may be increased periodically based upon application of a specific cost index.

The statutes require an adopted cost index to be:

(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 date 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.

The Engineering News Record (ENR) publishes a nationwide 20-city average cost escalation factor called the Construction Cost Index (CCI) that satisfies the criteria in this statute. The use of this 20-city average provides a well-established and well-known industry standard for the average change in construction costs. The current ENR CCI for July 2020 is 11,439.

In accordance with ORS 223.309(2), the City may adjust any of the capital improvement projects, adjust project cost estimates, or values of existing improvements by resolution or ordinance at any time. However, if the SDC is increased as a result of the addition of a new "capacity increasing capital improvement" project, the City must provide a written notice, a minimum of 30 days prior to adoption of the modifications, ***to persons who have requested notice under ORS 223.304(6).*** Subsequently, the City must hold a public hearing for adoption only if, within seven days of the proposed adoption, the City receives a written request for a hearing.

If the City elects to modify the cost allocation methodology as opposed to only adjusting the project values or CIP inventories, written notice is required to be mailed 90 days prior to any adoption hearings ***to all persons who have requested notification under ORS 223.304(6).*** Additionally, the revised methodology must subsequently be made available for public review a minimum of 60 days prior to the hearing for adoption.

If no persons are listed per ORS 223.304(6), then no advance notification is required for adjustments, other than those required for any public meeting.

CREDITS FOR ELIGIBLE CONSTRUCTION

ORS 223.304(4) requires that a method of credits be available for the construction of qualified public improvements. The statute further defines qualified public improvements as those required as a condition of development approval, identified in the plan and list adopted pursuant to ORS 223.309 and either:

(a) Not located on, or contiguous to, property that is the subject of development approval; or,

(b) Located in whole or in part on, or contiguous to, property that is the subject of development approval and required to be built larger, or with greater capacity, than is necessary for the particular development project to which the improvement fee is related.

As a result of ORS 223.304(4) (a), a credit must be provided for eligible off-site public improvements; and in accordance with ORS 223.2304(4) (b), a credit must be provided for on-site development for the component of an eligible improvement which has capacity greater than the local government's minimum standard facility size or capacity.

The following table summarizes the construction cost estimates with engineering and contingency based on the values adopted in the 2017 Facilities Plan, adjusted to the current ENR CCI, and establishes the estimated credit provided for eligible construction projects. The estimates include manholes, 40% for engineering, legal, administration and contingency, and exclude any costs for laterals.

CITY OF PHILOMATH
VALUE OF SANITARY SEWER CONSTRUCTION CREDITS
July 2020 ENR CCI 11,439

LINE SIZE	*8"*	*10"*	*12"*	*15"*	*18"*	*21"/24"*
CONSTRUCTION COST	$180/lf	$200/lf	$210/lf	$220/lf	$240/lf	$280/lf
OVERSIZE CREDIT	$0	$20/lf	$30/lf	$40/lf	$60/lf	$100/lf

These estimates are used to establish the value of the eligible components of existing collection system improvements. Credits provided to developers that construct an SDC eligible project are based on the actual costs incurred.

Credits are used to offset the SDC fees due from the developing property. In the event the credit exceeds the fees due from the development, the City will provide a credit against future development. ORS 223.304(5)(d) states credits must be used within 10 years. However, ORS 223.304(5)(c) allows the City to adopt credit provisions beyond the credits required by statute, if so desired.

When growth pressures mandate the City make improvements within fully-developed areas or unrelated to any specific development, the entire cost of the improvement may be funded with SDC revenues. If the improvement will provide service to undeveloped areas, the SDC expenditure should be reimbursed through an Advance Financing cost allocation or an SDC overlay covering the developable area.

CREDIT FOR PRE-EXISTING USE

A system development charge is imposed on all new construction, or when a change of use on a parcel increases the demand on the utility. In the event of a change of use, the system development charge for the new use shall be offset by a credit in the amount of the calculated system development charge for the pre-existing use. The adjustment may not reduce the SDC charges to result in a refund.

The City of Philomath policy is that if an existing service is discontinued, after 24 months it will be considered abandoned and no SDC credit for pre-existing use is provided to future redevelopment of the property.

SDC ADMINISTRATION REQUIREMENTS

Per ORS 223.311, System Development Charge revenues must be deposited in accounts designated for SDC revenues for each infrastructure. An annual accounting must be prepared by January 1 of each year, identifying amounts collected for each utility, the projects that were funded and the amount of revenues collected to administer the SDC in the previous ***fiscal year***.

The statute allows Reimbursement Fees to be expended on any capital improvements or associated debt service within the subject infrastructure. Improvement Fees may only be spent on projects that are included in a listing of eligible capital improvements planned to be funded with SDC revenues. Eligible projects include projects that increase capacity or level of performance on existing facilities, and associated debt service.

Oregon Revised Statutes 223.307(5) also allows SDC revenues to be expended for costs of complying with the provisions of the SDC statutes contained in ORS 223.297 to 223.314, including the costs of administration, and providing annual accounting of development charge expenditures. Accordingly, a 2% surcharge is added to each identified fee to account for the cost of administration.

Annually, a transfer from each SDC fund in the amount of the 2% of the annual collections may be made to the City department completing the administration for calculations, collections, accounting, and annual fee adjustments. This transfer should be identified in each annual summary.

REVIEW PROCEDURE

Adoption of this System Development Charge Methodology and Capital Improvement Plan includes the adoption of an administrative review procedure for the methodology, expenditures, and fee calculation.

Per ORS 223.304(7) (b) the SDC Methodology may be contested within 60 days of adoption in accordance with the procedure established in ORS 34.010 to 34.100. A challenge of any SDC expenditure must be made in accordance with the procedures defined in ORS 34.010 to ORS 34.100, and may be filed within 2 years of the SDC revenue expenditure.

If a private developer objects to the calculation of a system development fee, the City will take into consideration a utility impact analysis prepared specifically for the development that substantiates the demand on the infrastructure. The subsequent formal conclusion by the City may be contested through the procedures established in ORS 34.010 to ORS 34.100 for a writ of review. To avoid project delays, in the case of a contested fee calculation, the SDC fee payment shall be made as a deposit pending the formal review and outcome, at which time additional fees may be assessed or a refund provided.

EQUIVALENT DWELLING UNIT (EDU) DEMAND

The 2017 Wastewater System Facilities Plan identified Average Dry Weather Flow (ADWF) of 518,000 gallons for 2013-2015, with an associated population of 4,650. This equates to 110 gallons per day per capita, although this figure included Commercial/Industrial/Other demands. Metered sales records from the 2018 Water System Master Plan indicates residential demands comprise 70% of all water sales, with Commercial/Industrial/Other uses representing 30% of water demands. Based on water sales, the ADWF is estimated at 77 gallons per capita per day.

An Equivalent Dwelling Unit (EDU) is defined as the wastewater volume from a single-family residential unit, which is served by a 5/8" x 3/4" water service meter. Based on the US Census Data in the American Communities Survey, the average household size in Philomath is 2.64 persons. The average daily flow per household is then 2.64 persons times 77 gpc/d for a total of 200 gpd per EDU.

The 2017 Wastewater Facilities Plan projected a service population of 7,294 in the year 2037. To be compatible with the estimated UGB buildout population in the 2018 Water System Master Plan, a future population of 7,383 for the year 2038 will be used in this SDC update. A future serviced population of 7,383 equates to 2,800 residential EDU which comprise 70% of the system. Commercia/Industrial/Other services comprise the remaining 30% which equates to 1,200 additional EDU for a total of 4,000 EDU at buildout of the UGB.

REIMBURSEMENT FEE ASSET SUMMARY

The Reimbursement and the Improvement Fees include the replacement value of existing improvements and the estimated costs of needed future improvements allocated proportionally to all users. This methodology equitably accounts for excess capacity, as well as various system deficiencies, by allocating the value of existing improvements (in the Reimbursement Fee) and the cost of all needed improvements (in the Improvement Fee) over the total of all existing and future users. This ensures the charge to future users is no more than the allocation to existing users.

The Reimbursement Fee is intended to quantify the current replacement cost of all existing system improvements. The following table lists the estimated replacement cost of each component of the system available to serve existing and future wastewater flows, based on the July 2020 ENR CCI of 11,439. Values are adjusted to account for current condition, to exclude grants and principle forgiveness, and to remove any outstanding debt.

CITY OF PHILOMATH
SANITARY SEWER SYSTEM DEVELOPMENT CHARGE
REPLACEMENT COST OF EXISTING ASSETS
July 2020 ENR CCI 11,439

No.	*Project Description*	*Replacement Cost*
COLLECTION SYSTEM OVERSIZING:		
1	10" Oversize Pipe, 8,300 lf	$166,000
2	12" Oversize Pipe, 5,300 lf	159,000
3	15" Oversize Pipe, 2,200 lf	88,000
4	21" Oversize Pipe, 5,600 lf	560,000
5	24" Oversize Pipe, 800 lf	80,000
COLLECTION SYSTEM PUMPING STATIONS:		
6	Pump Station 'A'	$800,000
7	Newton Creek Pump Station	500,000
8	Timber Estates Pump Station	250,000
9	4", 14", 18" Force Mains, 9,700 lf	970,000
WASTEWATER TREATMENT FACILITIES:		
10	WWTP & Irrigation Real Estate, 235.9 Acres	$3,540,000
11	Headworks Structure	250,000

12	Lagoon Cells, 1A 1B, 2012, 31 Acres	4,900,000
13	Lagoon Cells 2 & 3, 1986, 37.5 Acres	6,100,000
14	Chlorine Contact Chambers	300,000
15	Marys River 16" & 24" Outfall Pipe	80,000
16	Chemical Feed Building	200,000
17	Lab Building	250,000
18	Irrigation Pump Station	300,000
19	Linear Irrigation Equipment & Piping	160,000
20	Site Piping & Improvements	200,000
PLANNING:		
21	2004 and 2017 Facility Planning	$100,000
	TOTAL	**$19,953,000**
	Less Bonded Debt Balance	4,560,400
	NET SDC ELIGIBLE VALUE	**$15,392,600**

SANITARY SEWER SDC REIMBURSEMENT FEE CALCULATION

The Reimbursement Fee is the total of the value of each system component divided by the number of EDU at build-out of the UGB:

SDC Reimbursement Fee = (Total Asset Value) / (Total EDU)

SDC Reimbursement Fee = ($15,392,600) / (4,000 EDU)

SDC Reimbursement Fee = $3,848 per EDU

SANITARY SEWER SYSTEM CAPITAL IMPROVEMENT PLAN

The following table contains the Capital Improvement Plan for future improvements identified in the 2017 Facilities Plan adjusted to the current Engineering News Record Construction cost estimate. The 2017 Plan cost estimates were based on an ENR CCI of 10,440. The current July 2020 ENR CCI is 11,439.

Priority 1 projects are anticipated to be needed in the next 1 to 5 years. Priority 2 projects are projected to be needed in 6 to 10 years. Priority 3 projects are anticipated to occur as private development expands into the UGB in 11 to 20 years. The SDC eligible costs of priority 3 projects include the oversize costs only. The cost of constructing an 8” sanitary sewer is anticipated to be funded by private development.

CITY OF PHILOMATH
SANITARY SEWER SYSTEM CAPITAL IMPROVEMENT PLAN
ESTIMATED COST OF CAPITAL IMPROVEMENTS
July 2020 ENR CCI 11,439

No.	*Project Description*	*Priority*	*2020 Total Estimated Cost*	*Estimated Grant/Loan/ Developers*	*Net SDC Cost*
G-1	9th & Applegate to 6th & Main, 1,400' of 10"	1	$440,000	$0	$440,000
G-2	10th St, Applegate to Main, 400' of 12"	1	140,000	0	140,000
G-3	Main St, 8th to 10th, 400' of 12" and 400' of 10"	1	250,000	0	250,000
G-4	7th & College to 8th & Main, 750' of 10"	1	210,000	0	210,000
G-8	20th & College to 21st & Applegate, 1,200' of 12"	1	380,000	0	380,000
G-16	Timber Estates Trunk, 1,800' of 8"	1	400,000	0	400,000
F-1	Newton Cr Force Main, 4,100' of 18"	1	1,580,000	0	1,580,000
T-3	Irrigation System Expansion	1	430,000	0	430,000
G-5	11th to 12th & Pioneer, 800' of 10"	2	$260,000	0	$260,000
G-6	15th St Trunk (S), 1,650' of 12"	2	560,000	0	560,000
G-7	15th St Trunk (N), 350' of 12"	2	130,000	0	130,000
P-3	Newton Creek Pump Station	2	1,620,000	0	1,620,000
T-1	Marys River Outfall Diffuser	2	190,000	0	190,000
T-2	Lagoon Aeration & Screening	2	2,750,000	0	2,750,000
T-4	Facilities Plan & SDC Update	2	70,000	0	70,000
G-9	Newton Cr Trunk, 2,650' of 24"	3	840,000	477,000	363,000
G-10	9th St Trunk, 2,700' of 24"	3	1,000,000	486,000	514,000
G-11	Railroad Trunk, 3,200' of 18"	3	1,100,000	576,000	524,000
G-12	19th St Green Rd Trunk, 1,000' of 21"; 2,000' of 15"; 2,000' of 12"	3	1,400,000	900,000	500,000
G-13	Industrial Way Trunk, 2,800' of 12"	3	950,000	504,000	446,000
G-14	Basin N5 Trunk, 2,400' of 15"	3	680,000	432,000	248,000
G-15	Chapel Dr Trunk, 4,200' of 10"	3	1,160,000	755,000	405,000
P-1	Basin P1 Pump Station	3	580,000	0	580,000
P-2	Basin P2 Pump Station	3	550,000	0	550,000
		TOTAL	**$17,670,000**	**$4,130,000**	**$13,540,000**

SANITARY SEWER SDC IMPROVEMENT FEE CALCULATION

Similar to the Reimbursement Fee, the SDC Improvement Fee is the total of the estimated costs for improvements required to serve buildout of the UGB, divided by the number of EDU at buildout:

SDC Improvement Fee = (Total Estimated Cost) / (Total EDU)

SDC Improvement Fee = ($13,540,000) / (4,000 EDU)

SDC Improvement Fee = $3,385 per EDU

SANITARY SEWER SDC FEE SUMMARY

All single family, multi-family, and auxiliary (ADU) residential units are assigned one EDU per dwelling unit which is based on 2.64 people and 200 gallons per day waste flow. Commercial/Industrial/Wholesale charges are based on EDU factors established by the capacity of the water meter serving the site. All SDC costs also include a compliance charge of 2% for staff review, fee calculation, fee collection and accounting requirements.

The following table is a summary of the updated Sanitary Sewer System Development Charge Fees:

CITY OF PHILOMATH
SANITARY SEWER SYSTEM SDC FEE SCHEDULE
July 2020 ENR CCI 11,439

	EDU Factor	*Reimbursement Fee*	*Improvement Fee*	*Admin Fee 2%*	*Total SDC*
Single / Multi-Family / ADU Residential Per Dwelling Unit:					
Per Unit	1	$3,848	$3,385	$145	**$7,378**
Commercial / Industrial Development Based on Meter Capacity:					
5/8" Meter	1	$3,848	$3,385	$145	**$7,378**
3/4" Meter	1	$3,848	$3,385	$145	**$7,378**
1" Meter	1.42	$5,464	$4,807	$205	**$10,476**
1 1/2" Meter	2.40	$9,235	$8,124	$347	**$17,706**
2" Meter	3.84	$14,776	$12,998	$555	**$28,330**
3" Meter	7.76	$29,860	$26,268	$1,123	**$57,251**

DRAFT
City of Philomath

TRANSPORTATION SYSTEM DEVELOPMENT CHARGE (SDC) & CAPITAL IMPROVEMENT PLAN

Benton County, Oregon

August **2020**

CURRAN-McLEOD, INC., CONSULTING ENGINEERS
6655 SW Hampton Street, Suite 210
Portland, Oregon 97223

City of Philomath

TRANSPORTATION SYSTEM DEVELOPMENT CHARGE & CAPITAL IMPROVEMENT PLAN

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City of Philomath

TRANSPORTATION SYSTEM DEVELOPMENT CHARGE & CAPITAL IMPROVEMENT PLAN

August 2020

OVERVIEW

This update of the City of Philomath Transportation System Development Charge (SDC) is intended to summarize the current value of the existing street improvements throughout the City, and to update the estimated costs of needed capital improvements as identified in the current Transportation System Plan. The goal is to identify an equitable, proportionate allocation of these values and costs to all users, current and future, with the goal of providing an SDC fee structure that is understandable, defensible and equitable to both the existing and future users of the system.

The City of Philomath first adopted a System Development Charge for all capital improvements in Resolution 94-18, with the initial transportation SDC established as $180 per single family residential unit. In 2004, the City updated the Capital Improvement Plan and System Development Charges and increased the Transportation SDC to $3,011 per single family residential unit. That fee is increased annually, since 2004, in accordance with the ENR construction cost index. The current 2020 Transportation SDC fee is $5,581 per single family residential unit.

The 2004 methodology included a portion of the present value of the existing transportation system to support a Reimbursement Fee component. The 2004 report included 32,000 feet of existing street improvements at 55% of the replacement cost. This value was allocated to an estimated population increase of 5,264 people beyond the then current 2004 population, to an assumed transportation system capacity of 9,725 population on existing streets.

Similarly, the SDC Improvement Fee in the 2004 SDC methodology was based on construction of only a portion of the City's 2000 Capital Improvement Plan, and allocating the cost only to the estimated population increase of 3,414 people from 2004 to the estimated population in the year 2024.

This current 2020 SDC update includes a similar methodology of generating estimated values and future costs, but includes all existing street improvements, and all projects from the current 2018 Philomath Transportation System Plan (TSP). The 2018 TSP quantified the transportation system capital improvements as those needed to serve buildout of the entire Urban Growth Boundary. Accordingly, this SDC update allocates a portion of the existing street values and a portion of the future capital improvement costs to the total population estimated at buildout of the UGB, to ensure an equitable, proportionate allocation.

SDC METHODOLOGY OVERVIEW

Oregon Revised Statutes 223.297 through 223.314 provide the statutory basis for application of System Development Charges. These statutes are intended to provide a uniform framework for development of equitable fees to support orderly growth.

According to the statute, SDCs are composed of:

- Reimbursement Fees to address the value of existing improvements,
- Improvement Fees to address the cost of needed future improvements, or
- Combination of both Reimbursement and Improvement Fees.

This SDC Update methodology identifies a current "*value*" for existing transportation improvements that can serve future growth, to establish the basis of the Reimbursement Fee. The basis for the Improvement Fee is the "*estimated cost*" of improvements not yet constructed but needed to serve future populations.

Existing transportation improvements have surplus capacity for future users as well as some areas of deficiencies or inadequacies in serving the existing users. Similarly, projects on the Capital Improvement Plan listing are required to provide capacity for future users, but also resolve deficiencies in service to the existing users. To account for the available capacity in the City's existing infrastructure and the concurrent need to undertake capital improvements to provide for growth, this SDC Update methodology includes a combination of both Reimbursement Fees and Improvement Fees.

The existing transportation infrastructure essentially provides a base level of service to serve all current and future users. The required capital improvements provide capacity to serve future growth as well as resolve existing deficiencies.

To ensure an equitable allocation of costs between existing and future users, the value of existing facilities and the estimated cost of future improvements are allocated to all users, current and future equally, based on their proportionate use of the transportation system. This method of allocating costs to all users ensures that the charge to future connections is equitable and that it is no more than the proportionate cost allocated to each existing user.

This methodology avoids double charging for capacity and is also independent of current population. With this approach there is no need to identify percentage of remaining capacity to serve future users, nor to estimate future population growth. This allocation is dependent only upon the ultimate capacity of the service area, which is the Urban Growth Boundary, the value of the existing facilities, and the estimated cost of the facilities required to serve future growth.

Population projections are useful to anticipate future needs; however, the rate of growth to reach the projected population does not impact the fee calculations. The fee is based on funding the needed improvements to support growth, independent of when population growth is realized. In periods of high growth, SDC revenues will accrue more quickly to allow undertaking improvements earlier to support the accelerated growth. In periods of low growth, revenues will accrue more slowly, but the need for infrastructure improvements to support this growth is also protracted.

EQUIVALENT DWELLING UNIT (EDU) DEFINITION

SDCs are typically collected with building permits for new developments, which reflect the underlying land use zoning. In this SDC Update, the Transportation SDC is based on the type of land use and the average weekday trip rates generated by development in each land use. The Institute of Transportation Engineers (ITE) publishes trip rates based on multiple field studies to determine the number of Equivalent Length New Daily Trips (ELNDT) created by each type of development.

The United States Census in 2019 updated the population characteristics for the City of Philomath indicating there were an average of 2.64 persons per household, which defines an Equivalent Dwelling Unit (EDU).

The Transportation Reimbursement and Improvement Fee calculations in this SDC Update define a cost impact per trip, or ELNDT, which is then multiplied by the number of trips determined by ITE for each type of land use to determine the SDC fee per EDU. Current ELNDT rates are published by the Institute of Transportation Engineers, which are adopted by reference with this SDC Update.

In addition to the published trip rates, a Local Factor has been developed in conjunction with City Staff to adjust for estimated by-pass trips and varying trip lengths. This accounts for vehicles that make several stops in the same trip and the shorter trip lengths. This factor reduces the effective trip rate depending upon the land use. Trip rates and Local Factors are listed at the end of this text.

Per the Institute of Transportation Engineers 10th Edition, a single-family residential unit creates 9.44 ELNDT, which in this SDC update defines one Equivalent Dwelling Unit (EDU) serving an average of 2.64 population.

ANNUAL ADJUSTMENTS

As permitted by ORS 223.304(8): 1) adopted SDC fees may be adjusted as needed, based upon changes in the cost of materials, labor or real property applied to projects or project capacity as set forth in the associated systems' CIP; or 2) adopted SDC fees may be increased periodically, based upon application of a specific cost index.

The statutes require an adopted cost index to be:

(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 date 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.

The Engineering News Record (ENR) publishes a nationwide 20-city average cost escalation factor called the Construction Cost Index (CCI) that satisfies the criteria in this statute. The use of this 20-city average provides a well-established and well-known industry standard for the average change in construction costs. For reference, this current SDC update is based on an ENR CCI for July 2020 of 11,439.

In accordance with ORS 223.309(2), the City may adjust the list of the capital improvement projects, adjust project cost estimates, or values of existing improvements by resolution or ordinance at any time. However, if the SDC fee is increased as a result of the addition of a new "capacity increasing capital improvement" project, the City must provide a written notice, a minimum of 30 days prior to adoption, of the modifications ***to persons who have requested notice under ORS 223.304(6).*** Subsequently, the City must hold a public hearing for adoption only if, within seven days of the proposed adoption, the City receives a written request for a hearing.

If the City elects to modify the cost allocation methodology as opposed to only adjusting the project values or CIP inventories, written notice is required to be mailed 90 days prior to any adoption hearings ***to all persons who have requested notification under ORS 223.304(6)***. Additionally, the revised methodology must subsequently be made available for public review a minimum of 60 days prior to the hearing for adoption.

If no persons are listed per ORS 223.304(6), then no advance notification is required for adjustments, other than those required for any public meeting.

CREDITS FOR ELIGIBLE CONSTRUCTION

ORS 223.304(4) requires that a method of credits be available for the construction of qualified public improvements. The statute further defines qualified public improvements as 1) those required as a condition of development approval, 2) identified in the plan and list adopted pursuant to ORS 223.309 and 3) either:

(a) Not located on or contiguous to property that is the subject of development approval; or

(b) Located in whole or in part on or contiguous to property that is the subject of development approval and required to be built larger or with greater capacity than is necessary for the particular development project to which the improvement fee is related.

As a result of ORS 223.304(4)(a), a 100% credit must be provided to the developer for eligible off-site public improvements. If the City approves an SDC eligible off-site improvement, the cost of the oversizing, any street standard above a residential 36-foot section, is an SDC eligible expense. The minimum street improvement costs, those associated with construction of a 36-foot residential section, must be included in the SDC credit but should be collected from any abutting properties as they develop. A reimbursement district per the Philomath Municipal Code Chapter 14.25 should be created anytime an SDC credit is given for an off-site improvement. These collected funds should reimburse the SDC fund when collected.

In accordance with ORS 223.304(4)(b) credit must also be provided for on-site development for the component of an eligible improvement which has capacity greater than the local government's minimum standard facility size or capacity. For the City of Philomath, the minimum street improvement required for all developments is a local street with 36-foot curb-to-curb travel surface, curb, and sidewalks, in a 50-foot right-of-way. The cost of any SDC eligible on-site improvement exceeding the local street standard is eligible for an SDC credit.

The current Philomath Public Works Design Standards define the street sections as follows:

- Local Streets are 36' wide with 3 1/2" of ACP over 10" of base, in a 50-foot right-of-way;
- Collectors are 36' wide with 4" of ACP over 15" of base in a 60-foot right-of-way;
- Commercial/Industrial similarly are 36' wide, 4" of ACP over 15" of base in a 60' ROW;
- Arterials are 42' wide with 4" of ACP over 15" of base in a 70-foot right-of-way.

A credit for eligible construction should be based on actual costs submitted by the contractor, for the cost of eligible construction required to be larger than a local street, including the value of stormwater improvements and additional right-of-way. The estimated values for the varying structural sections are shown in the following table.

CITY OF PHILOMATH
TRANSPORTATION SYSTEM IMPROVEMENTS
FULL STREET CONSTRUCTION CREDITS
July 2020 ENR CCI 11,439

		ESTIMATED COST	*OVERSIZE CREDIT*
Local Street, 36 feet	Per LF	$520	$0
Collector Street, 36 feet	Per LF	$720	$200
Commercial/Industrial Street 36 feet	Per LF	$720	$200
Arterial Street, 42 feet	Per LF	$935	$415

SDC CREDIT PAYMENTS

Credits are used to offset the SDC fees due from the developing property. In the event the credit exceeds the fees due from the development, the City provides a credit against future development. ORS 223.304(5)(d) limits the application of a credit for future development to a maximum of 10 years. However, ORS 223.304(5)(c) allows the City to adopt additional methods of credit beyond the qualified public improvement credits required by statute, if desired.

CREDIT FOR PRE-EXISTING USE

A system development charge is imposed on all new construction, or when a change of use on a parcel increases the demand on the infrastructure. In the event of a change of use, the system development charge for the new use shall be offset by a credit in the amount of the calculated system development charge for the pre-existing use. The adjustment may not reduce the SDC charges to result in a refund.

SDC ADMINISTRATION REQUIREMENTS

Per ORS 223.311, System Development Charge revenues must be deposited in accounts designated for SDC revenues for each infrastructure. An annual accounting must be prepared by January 1st of each year identifying amounts collected for each utility, and the projects that were funded in the previous fiscal year.

The statute allows Reimbursement Fees to be expended on any transportation system capital improvement or associated debt service. Improvement Fees may only be spent on projects that are included in the Transportation System Capital Improvement Plan, including associated debt service. The statute requires each fee be accounted for separately.

Oregon Revised Statutes 223.307(5) allows SDC revenues to be expended for costs of complying with the provisions of ORS 223.297 to 223.314, including the costs of administration, and providing annual accounting of development charge expenditures. Accordingly, a 2% surcharge is added to each identified fee to account for the cost of administration.

The administrative charges collected with each SDC payment should be a separate accounting from the improvement and reimbursement fee collections. These administrative funds can be expended for any administrative charge or transferred to a general fund as a reimbursement for the cost expended by City staff to administer any aspect of the SDC program. The administrative charges collected and expended should be inventoried separately on the annual SDC accounting.

TRIP RATE FACTORS:

An equitable method for allocating demands on a transportation system is to proportion the value of existing improvements and the estimated costs of future improvements based on use, or the relative number of trips created by a development.

This 2020 SDC Update adopts the use of weekday average vehicle trips, called Equivalent Length New Daily Trips (ELNDT), as is currently published in the ITE Trip Generation Manual, 10th Edition, as the basis for the cost allocation factors.

This update also incorporates a Local Factor that considers the length of a typical trip and the number of trips that share multiple stops, or by-pass trips that occur on a single trip. These factors have greater impacts in larger density communities, with larger commercial centers than on rural communities like Philomath, but also provide increased equity for small communities. The selection of factors to account for these impacts is generally based on professional judgment. The factors used in this SDC Update have been developed with assistance of the City staff.

TRANSPORTATION SYSTEM SDC REIMBURSEMENT FEE:

A Reimbursement Fee is intended to incorporate the value of existing transportation system improvements with capacity to accommodate future growth.

The City has a large asset value in the existing street system that provide capacity and a basis for reimbursement from future users. As a result of not having the history of funding with grants or donations for each street, which must be deducted from the asset value, and to account for a depreciated condition, this asset value is conservatively estimated at 50% of the replacement cost of each street. This value can be supported by the inflation component of the current replacement value regardless of the initial source of funds. This is based on the estimated average age of the streets being over 25 years with inflation in accordance with the ENR CCI.

The eligible costs are limited to the value of the travel surface, but do not include the value of the curb and sidewalk. The curb and sidewalk improvements are considered to benefit only the abutting properties and do not contribute to the capacity for future growth. Unit costs for the value of existing streets are estimated in the following table:

CITY OF PHILOMATH
UNIT COSTS TO SUPPORT THE VALUE OF EXISTING IMPROVEMENTS
July 2020 ENR CCI 11,439

Improvement	*Value per Ft of Width*	*50% SDC Eligible per Ft Width*
Local Street Section	$9.33	$4.66
Collector Street Section	$14.90	$7.45
Commercial/Industrial Section	$17.90	$8.95

The following table lists the estimated value of the existing public street improvements under the jurisdiction of the City of Philomath:

CITY OF PHILOMATH
TRANSPORTATION SYSTEM REIMBURSEMENT FEE
VALUE OF EXISTING IMPROVEMENTS
July 2020 ENR CCI 11,439

No.	*Street Improvement*	*Class*	*Length (FT)*	*Ave Width (FT)*	*Value per foot Width*	*Total Value*
1	Melville Crescent, Sunshine to End	L	1,400	36	$4.66	$234,864
2	Sunshine Ave, Topaz to End	L	1,100	36	4.66	184,536
3	Topaz St, College to End	L	1,450	36	4.66	243,252
4	Jade Place, College to Topaz	L	600	36	4.66	100,656
5	Dampler Dr, Jade to College	L	1,150	36	4.66	192,924
6	Amethyst Ave, Topaz to Pioneer	L	300	36	4.66	50,328
7	Tasman Pl, Pioneer to End	L	300	28	4.66	39,144
8	Canberra Dr, Pioneer to Adelaide	L	600	36	4.66	100,656
9	Coastal View Dr, Pioneer to End	L	950	36	4.66	159,372
10	Fawn Ln, Coastal View to End	L	600	28	4.66	78,288
11	Pioneer St, Sunshine to N 9th	L	2,600	36	4.66	436,176
12	Pioneer St, N 9th St to N 13th	C	1,550	36	7.45	415,710
13	Adelaide Dr, Pioneer to End	L	800	36	4.66	134,208
14	College St, Jade to Topaz	L	450	36	4.66	75,492
15	College St, Dampler to NE 7th	L	300	36	4.66	50,328
16	College St, NE 7th to NE 8th	L	350	16	4.66	26,096
17	N 7th St, Philomath to Pioneer	L	750	36	4.66	125,820
18	N 7th St, Pioneer to End	L	300	16	4.66	22,368
19	N 8th St, Philomath to RR	L	260	36	4.66	43,618
20	N 8th St, College to End	L	1,200	16	4.66	89,472
21	Quail Glen Dr, 9th to 11th	L	750	36	4.66	125,820
22	Bobwhite Pl, Quail Glen to End	L	140	28	4.66	18,267
23	Grouse Pl, Quail Glen to End	L	220	28	4.66	28,706
24	Dove Pl, Quail Glen to End	L	120	28	4.66	15,658
25	N 10th St, Philomath to College	L	350	25	4.66	40,775
26	N 10th St, RR to End	L	700	16	4.66	52,192
27	College St, 9th to 10th	L	350	16	4.66	26,096
28	N 11th St, Pioneer to Quail Glen	L	1,050	18	4.66	88,074
29	N 11th Quail Glen to End	L	600	36	4.66	100,656
30	N 12th St, Philomath to RR	L	600	36	4.66	100,656
31	N 12th St, Pioneer to Lincoln	L	800	20	4.66	74,560
32	N 12th St, Lincoln to House	L	1,650	24	4.66	184,536
33	N 13th St, Philomath to Pioneer	C	750	42	7.45	234,675
34	N 13th St, Pioneer to End	L	350	26	4.66	42,406

35	N 14th St, Philomath to College	L	350	42	4.66	68,502
36	N 14th St, College to RR	L	350	20	4.66	32,620
37	N 15th St, Philomath to Pioneer	L	250	42	4.66	48,930
38	College, N 12th to N 13th	L	350	46	4.66	75,026
39	College St, N 12th to N 20th	C	3,000	46	4.66	643,080
40	Pioneer St, N 15th to N 17th	L	750	36	4.66	125,820
41	Pioneer St, N 17th to N 18th	L	350	14	4.66	22,834
42	N 16th St, Philomath to Pioneer	L	750	36	4.66	125,820
43	N 16th Ln, N 16th to N 17th	L	500	14	4.66	32,620
44	N 17th St, Philomath to Pioneer	L	900	36	4.66	150,984
45	N 17th St, Pioneer to 16th Ln	L	160	16	4.66	11,930
46	N 18th St, College to End	L	550	26	4.66	66,638
47	N 18th St, Philomath to College	L	350	56	4.66	91,336
48	Industrial Way, End to City Limits	C	1,400	42	7.45	438,060
49	N 20th St, Philomath to College	L	300	36	4.66	50,328
50	N 20th St, College to End	L	950	30	4.66	132,810
				Total of North Streets		**$6,053,722**
51	S 7th St, Philomath to Applegate	L	320	36	$4.66	$53,683
52	S 8th St, Philomath to Applegate	L	320	36	4.66	53,683
53	S 9th St, Philomath to Applegate	L	320	36	4.66	53,683
54	S 9th St, Applegate to End	L	400	24	4.66	44,736
55	S 10th St, Philomath to Applegate	L	320	36	4.66	53,683
56	S 11th St, Philomath to End	L	650	36	4.66	109,044
57	S 12th St, Philomath to Applegate	L	320	36	4.66	53,683
58	S 13th St, Philomath to Applegate	C	320	50	7.45	119,200
59	S 14th St, Philomath to Applegate	L	320	40	4.66	59,648
60	S 15th St, Philomath to Applegate	L	80	16	4.66	5,965
61	S 15th St, Applegate to Cooper	L	1,250	40	4.66	233,000
62	S 15th St, Cooper to Chapel	L	1,100	20	4.66	102,520
63	Cedar St, S 13th to S 15th	L	720	36	4.66	120,787
64	Cedar Pl, Cedar St to End	L	300	28	4.66	39,144
65	Cooper Ln, S 15th to End	L	370	16	4.66	27,587
66	Willow St, S 15th to End	L	350	18	4.66	29,358
67	S 16th St, Philomath to Applegate	L	320	40	4.66	59,648
68	S 16th St, Applegate to End	L	700	20	4.66	65,240
69	S 17th St, Philomath to Applegate	L	320	40	4.66	59,648
70	S 17th St, Applegate to Cedar	L	900	34	4.66	142,596
71	S 17th St, Cedar to End	L	200	14	4.66	13,048
72	Maple St, S 17th to S 19th	L	540	15	4.66	37,746
73	Ash St, S 17th to S 19th	L	540	15	4.66	37,746
74	Cedar St, S 17th to S 19th	L	540	32	4.66	80,525
75	S 18th St, Applegate to Cedar	L	850	36	4.66	142,596
76	S 18th St, Cedar St to End	L	300	32	4.66	44,736

77	S 20th St, Philomath to Applegate	L	350	40	4.66	65,240
78	S 21st St, Philomath to Applegate	L	350	40	4.66	65,240
79	S 23rd St, Applegate to End	L	200	36	4.66	33,552
80	S 24th St, Philomath to Applegate	L	600	34	4.66	95,064
81	S 26th St, Philomath to Applegate	C	850	42	7.45	265,965
82	S 27th St, Applegate to End	L	200	36	4.66	33,552
83	S 28th Pl, Applegate to End	L	120	34	4.66	19,013
84	S 29th Pl, Applegate to End	L	120	34	4.66	19,013
85	Green St, Philomath to S 26th	L	1,700	36	4.66	285,192
86	Newton St, S 24th to Philomath	L	2,300	36	4.66	385,848
87	Jeffery Pl, Newton to End	L	360	34	4.66	57,038
88	James St, Newton to S 30th	L	800	36	4.66	134,208
89	Marion St, James to End	L	650	36	4.66	109,044
90	Marion Pl, Marion St to End	L	250	34	4.66	39,610
91	Vincent St, Marion to Applegate	L	900	36	4.66	150,984
92	Robb Pl, Vincent to End	L	300	34	4.66	47,532
93	Sunrose Ct, Neabeack to End	L	140	28	4.66	18,267
94	Acorn Ct, Neabeack to End	L	140	28	4.66	18,267
95	Maplewood Ct, Neabeack to End	L	140	28	4.66	18,267
96	S 30th St, Southwood to Applegate	L	2,200	36	4.66	369,072
97	S 31st St, Applegate to Benton Vw	L	950	36	4.66	159,372
98	Neabeack Hill Dr, S 30th to Benton	L	2,400	36	4.66	402,624
99	Richard Pl, Neabeack to End	L	380	28	4.66	49,582
100	Stoneboro Pl. Neabeack to End	L	260	28	4.66	33,925
101	Woodbine Pl, Neabeack to End	L	300	28	4.66	39,144
102	Avondale Pl, Neabeack to End	L	290	28	4.66	37,839
103	Pinnacle Pl, Neabeack to End	L	300	28	4.66	39,144
104	Brentwood Pl, Neabeack to End	L	200	28	4.66	26,096
105	Applegate St, S 15th to S 21st	C	2,400	42	7.45	750,960
106	Applegate St, S 21st to S 26th	C	2,400	42	7.45	750,960
107	Applegate St, S 26th to S 30th	C	1,500	36	7.45	402,300
108	Benton View, Mt Union to S 31st	L	1,800	30	4.66	251,640
109	Benton View, S 31st to Neabeack	L	1,300	22	4.66	133,276
110	Southwood Dr, Mt. Union to End	L	1,750	36	4.66	293,580
111	S 33rd Pl, Southwood to S 34th	L	650	36	4.66	109,044
112	S 34th Pl, Southwood to End	L	680	36	4.66	114,077
113	McCall Way, End to End	L	950	28	4.66	123,956
114	Lowther Pl, S 19th to McCall	L	270	36	4.66	45,295
115	Starker Pl, S 19th to McCall	L	270	36	4.66	45,295
					Total of South Streets	**$7,881,012**
					TOTAL	**$13,934,734**

TRANSPORTATION SDC REIMBURSEMENT FEE CALCULATION:

An estimated number of Equivalent Length New Daily Trips (ELNDT) was not included in either the 1999 Philomath Transportation System Plan or the 2018 TSP update. As a result, an estimate of buildout ELNDT is shown below based on population and land use.

At buildout of the UGB, a population of 7,383 has been projected in the infrastructure master plans prepared for the City. Based on the Census data this future population results in a total of 7,383 population divided by 2.64 persons per household to equal 2,800 EDU. ELNDTs are estimated at 10 trips per EDU for residential development.

In the City of Philomath there are 13 acres of commercially zoned land and 105 acres of industrial land. For commercial zoned areas, trips are based on building improvements occupying an estimated 50% lot coverage with an average trip factor of 30 ELNDT per 1,000 square feet (KSF). For industrial lands, buildings are estimated to occupy 10% of the area with an average trip factor of 5 ELNDT per KSF.

CITY OF PHILOMATH
ESTIMATED AVERAGE WEEKDAY ELNDT
WITHIN THE URBAN GROWTH BOUNDARY
July 2020

LAND USE	*TOTAL UNITS*	*UNITS PER EDU*	*TRIP RATE*	*ELNDT AVE WEEKDAY*
RESIDENTIAL	7,383 Pop	2.64 / EDU	10 per EDU	28,000
COMMERCIAL	13 Acres	21.8 KSF / Ac	30 per KSF	8,500
INDUSTRIAL	105 Acres	4.36 KSF / Ac	5 per KSF	2,300
TOTAL ESTIMATED ELNDT AT BUILDOUT				**38,800**

The value of transportation system improvements to serve future users is estimated at $13,934,734. The Reimbursement Fee component of the SDC is calculated by dividing the total value by the number of benefitting ELNDT at full buildout of the UGB:

SDC Reimbursement Fee = (Reimbursement Value) / (Total ELNDT)

SDC Reimbursement Fee = ($13,934,734) / (38,800 ELNDT)

SDC Reimbursement Fee = $359 per ELNDT

TRANSPORTATION SYSTEM CAPITAL IMPROVEMENT PLAN:

The most recent capital improvement plan was prepared as part of the 2018 Transportation System Plan. Capital improvements identified to serve buildout of the UGB were divided into several tiers related to financial and physical feasibility. The capital improvement plan listed in this SDC includes all the projects from all tiers, with an estimate of other funds needed to make the projects feasible. The details of each project can be found in the 2018 Transportation System Plan.

The following table is a summary of all improvements identified to support buildout of the UGB and includes roadway improvements, pedestrian and bicycle route improvements, connectivity, congestion, and safety improvements, all of which are considered an integral component of the transportation system. The costs have been adjusted to the July 2020 ENR CCI of 11,439 from the estimates in the 2018 Transportation System Plan. Additionally, projects that were identified as funded by ODOT, Benton County, developer or other sources have been noted with an asterisk and 20% of the costs to a maximum of $200,000 is included as a feasible estimate of an SDC cost share. These cost share amounts allow the projects to use SDC revenues, and also help prompt projects under other's jurisdictions to occur sooner.

CITY OF PHILOMATH
TRANSPORTATION SYSTEM CAPITAL IMPROVEMENT PLAN
ESTIMATED COST OF IMPROVEMENTS
July 2020 ENR CCI 11,439

Tier 1. Financially Constrained Projects: 1 - 10 years

TSP No.	*Project*	*Total Cost*	*Other*	*Source*	*SDC Cost*
Cr-2/BL-1	College St Sidewalks	$32,000	$0	City	$32,000
SUP-3	Willow St/Cedar St Path	240,000	0	City	$240,000
SUP-7	Hunsaker Path	128,000	128,000	Parks	$0
SW-4	17th Street Sidewalks	53,500	0	City	$53,500
SW-5/BL-2	Applegate, 16th to 21st	26,500	0	City	$26,500
Up-1*	Downtown Streets, Ph 1	13,850,000	13,650,000	C/URA/ODOT	$200,000
TS-1	School Circulation Study	21,500	0	City	$21,500
NR-9/Up-11	S 16th St Modernization	2,130,000	0	City	$2,130,000
Cr-1*	US 20/OR 34 & 17th St	128,000	102,400	ODOT	$25,600
Int-2*	US 20/OR 34 & 26th St	1,012,000	812,000	ODOT	$200,000
ITS-3*	Bike Signal Detection	24,500	19,600	ODOT	$4,900
Up-10*	US 20/OR 34 Widening	1,065,000	865,000	ODOT	$200,000
Int-1*	Weigh Station Relocation	1,600,000	1,400,000	ODOT	$200,000
--	Planning & SDC Update	50,000	0	City	$50,000
	TOTAL	**$20,361,000**	**$16,977,000**		**$3,384,000**

Tier 2. Aspirational Projects: 1-20 years

TSP No.	Project	Total Cost	Other		SDC Cost
B-1	Regional Bike Hub	26,500	$0	City	$26,500
B-2	Bicycle Wayfinding	54,000	0	City	$54,000
Cr-3	Cedar/13th to Willow/15th	7,500	0	City	$7,500
SR-1	N 13th St Safe Route	5,500	0	City	$5,500
SR-2	N 17th St Safe Route	5,500	0	City	$5,500
SR-3	Plymouth Dr Bike Route	10,500	0	City	$10,500
SW-2/SR-4	Pioneer St Safe Route, Adelaide to 9th Street	85,000	0	City	$85,000
SW-3/SR-5	Pioneer St Safe Route, 9th to 13th Streets	26,500	0	City	$26,500
Tr-2	Bus Stop Amenities	42,500	0	City	$42,500
ITS-2	ODOT Freight Study	213,000	213,000	ODOT	$0
UP-9*	US 20/OR 34 Widening	46,010,000	45,810,000	ODOT	$200,000
ITS-1*	9th St Hill Improvements	80,000	64,000	County	$16,000
SUP-1*	19th St Shared Use Path	5,325,000	5,125,000	County	$200,000
SUP-11*	Chapel Dr Path	5,256,000	5,056,000	Pri/Co	$200,000
SUP-12*	Bellfountain Rd Path	600,000	480,000	Pri/Co	$120,000
Up-7*	S 13th St Upgrade	4,475,000	4,275,000	County	$200,000
UP-12	Enhance Existing Streets	500,000	0	City	$500,000
	TOTAL	**$62,722,500**	**$61,023,000**		**$1,699,500**

Tier 3. Connectivity & Congestion: 1-20 years

TSP No.	Project	Total Cost	Other		SDC Cost
NR-1*	Clemens to West Hills	21,200,000	21,000,000	Pri/Co	$200,000
NR-2*	26th St to Chapel Dr	9,600,000	9,400,000	Pri/City	$200,000
NR-3*	N 19th to West Hills	20,020,000	19,820,000	Pri/City	$200,000
NR-4*	West Hills Minor Collector	6,400,000	6,200,000	Pri/City	$200,000
NR-5*	Industrial to West Hills	9,160,000	8,960,000	Pri/City	$200,000
NR-6*	N 9th St Minor Collector	7,670,000	7,470,000	Pri/City	$200,000
NR-7*	Clemens Rd Modernization	7,030,000	6,830,000	Pri/City	$200,000
NR-8*	N 13th Street Extension	7,460,000	7,260,000	Pri/City	$200,000
TS-2*	US 20/OR34 Clemens	640,000	512,000	ODOT	$128,000
Up-9*	US 20/OR34 Widening	45,800,000	45,600,000	ODOT	$200,000
	TOTAL	**$134,980,000**	**$133,052,000**		**$1,928,000**

Tier 4. Safety: 1-20 years

TSP No.	Project	Total Cost	Other		SDC Cost
Int-3*	US 20/OR 34 & 19th	$725,000	580,000	ODOT/Co	$145,000
Li-1*	N 12th Street Lighting	2,140,000	1,940,000	City	$200,000
Li-2*	19th St & Applegate Lighting	80,000	64,000	City/Co	$16,000
	TOTAL	**$2,945,000**	**$2,584,000**		**$361,000**

Tier 5. Pedestrian & Bicycle: 1-20 years

TSP No.	*Project*	*Total Cost*	*Other*		*SDC Cost*
SW-6	Westbrook Park Sidewalk	$10,600	0	City	$10,600
SUP-2	Philomath Rodeo Grounds	$700,000	700,000	City	$0
SUP-5*	US 20/OR 34 Applegate Bike Access Imp	266,000	212,800	City	$53,200
SUP-6*	Clemens Mill Road Path	2,625,000	2,425,000	Parks	$200,000
SUP-8*	Industrial to N 9th St	84,000	67,200	Parks	$16,800
SUP-9 *	12th St to West Hills	84,000	67,200	Parks	$16,800
SUP-10*	Southside Bikeway	310,000	248,000	Parks	$62,000
Up-2*	Downtown Streets, Ph 2	5,645,000	5,445,000	City/ODOT	$200,000
Up-3*	19th St Urban Upgrade	2,120,000	1,920,000	Pri/Co	$200,000
Up-4*	9th St Urban Upgrade	9,050,000	8,850,000	Pri/Co	$200,000
Up-5*	West Hills Rd Upgrade	6,285,000	6,085,000	Pri/Co	$200,000
	TOTAL	**$27,169,000**	**$26,020,200**		**$1,148,800**

TOTAL ALL PROJECTS	**$248,177,500**	**$239,656,200**		**$8,521,300**

* 20% of project costs included up to $200,000 as seed funding

TRANSPORTATION SYSTEM SDC IMPROVEMENT FEE CALCULATION

The SDC methodology allocates the eligible costs of needed improvements over all users, existing and future. The cost per ELNDT is then:

SDC Improvement Fee = (CIP ELIGIBLE COSTS) / (Total ELNDT)

SDC Improvement Fee = ($8,521,300)/ (38,800 ELNDT)

SDC Improvement Fee = $220 per ELNDT

TRANSPORTATION SYSTEM TOTAL SDC FEE CALCULATION

Following is a summary of the Transportation System Development Charge fee:

SDC Reimbursement Fee = $359 per ELNDT
SDC Improvement Fee = $220 per ELNDT
Administration Fee 2% = $12 per ELNDT

Total SDC Fee = $591 per ELNDT

The following table lists the SDC costs for selected land uses. Attached at the end of this section is a complete listing of all available ITE trip categories with published average weekday trip rates from the 10th Edition as adjusted by a local factor for length and by-pass trips.

CITY OF PHILOMATH
TRANSPORTATION SDC FEES FOR SELECTED LAND USES
BASED ON ITE AVERAGE WEEKDAY ELNDT

July 2020 ENR CCI 11,439

Single Family Residential, Per Unit:

ITE Category	*ELNDT*	*Local Factor*	*Reimbursement Fee*	*Improvement Fee*	*Administration*	*TOTAL*
210	**9.44**	**100%**	**$3,389**	**$2,077**	**$113**	**$5,579**

Apartments, Per Unit:

ITE Category	*ELNDT*	*Local Factor*	*Reimbursement Fee*	*Improvement Fee*	*Administration*	*TOTAL*
220	**7.32**	**100%**	**$2,628**	**$1,610**	**$88**	**$4,326**

General Office, Per KSF:

ITE Category	*ELNDT*	*Local Factor*	*Reimbursement Fee*	*Improvement Fee*	*Administration*	*TOTAL*
710	**9.74**	**20%**	**$699**	**$429**	**$23**	**$1,151**

Variety Store, Per KSF:

ITE Category	*ELNDT*	*Local Factor*	*Reimbursement Fee*	*Improvement Fee*	*Administration*	*TOTAL*
814	**63.47**	**20%**	**$4,557**	**$2,793**	**$152**	**$7,502**

Fast Food Restaurant with Drive Through, Per KSF:

ITE Category	*ELNDT*	*Local Factor*	*Reimbursement Fee*	*Improvement Fee*	*Administration*	*TOTAL*
934	**470.95**	**20%**	**$33,814**	**$20,722**	**$1,130**	**$55,666**

CITY OF PHILOMATH
ITE TRIP RATES, LOCAL FACTOR & ELNDT RATES
ITE 10TH Edition

ITE #	Land Use	ITE Trip Rate*	Local Factor	ELNDT Rate
110	General Light Industrial, Per KSF	4.96	100%	4.96
130	Industrial Park, Per KSF	3.37	100%	3.37
140	Manufacturing, Per KSF	3.93	100%	3.93
150	Warehousing, Per KSF	1.74	100%	1.74
151	Mini-Warehouse, Per KSF	1.51	100%	1.51
160	Data Center, Per KSF	0.99	100%	0.99
210	Single-Family Detached Housing, Per Dwelling	9.44	100%	9.44
220	Multifamily Housing	7.32	100%	7.32
231	Mid-Rise Residential w/ 1st Floor Commercial	3.44	100%	3.44
240	Mobile Home Park, Per Occupied Dwelling	5	100%	5.00
251	Senior Adult Housing - Detached, Per Dwelling	4.27	100%	4.27
252	Sr. Adult Housing - Attached, Per Occupied Dwelling Unit	3.7	100%	3.70
253	Congregate Care Facility, Per Occupied Dwelling Unit	2.02	100%	2.02
254	Assisted Living, Per Bed	4.24	100%	4.24
255	Continuing Care Retirement Community, Per Occupied Unit	2.4	100%	2.40
270	Residential Planned Unit Development, Per Dwelling	7.38	100%	7.38
310	Hotel, Per Room	8.36	50%	4.18
311	All Suites Hotel, Per Room	4.46	50%	2.23
312	Business Hotel, Per Occupied Unit	4.02	50%	2.01
320	Motel, Per Room	3.35	50%	1.68
411	Public Park, Per Acre	0.78	50%	0.39
416	Campground/Recreational Vehicle Park, occ. Sites	N/A	50%	0.00
444	Movie Theater, screens	220	50%	110.00
445	Multiplex Movie Theatre, screens	292.5	50%	146.25
488	Soccer Complex, Per Field	71.33	50%	35.67
490	Tennis Courts, Per Court	30.32	50%	15.16
491	Racquet/Tennis Club, Per KSF	27.71	50%	13.86
492	Health/Fitness Club, Per KSF	N/A	50%	0.00
495	Recreational Community Center, Per KSF	28.82	50%	14.41

520	Elementary School, Per KSF students	19.52	50%	9.76
522	Middle School/Junior High School, Per KSF students	20.17	50%	10.09
530	High School, Per KSF students	14.07	50%	7.04
534	Private School (K-8), students	4.11	50%	2.06
536	Private School (K-12), students	2.48	50%	1.24
540	Junior/Community College, Per KSF	20.25	50%	10.13
560a	Church (Weekday), Per KSF	6.95	50%	3.48
560b	Church (Saturday/Sunday), Per KSF	27.63	50%	13.82
565	Day Care Center, Per KSF	47.62	50%	23.81
590	Library, Per KSF	72.05	50%	36.03
610	Hospital, Per KSF	10.72	50%	5.36
620	Nursing Home, Per KSF	6.24	50%	3.12
630	Clinic, Per KSF	38.16	50%	19.08
710	General Office Building, Per KSF	9.74	20%	1.95
715	Single Tenant Office Building, Per KSF	11.25	20%	2.25
720	Medical-Dental Office Building, Per KSF	34.8	20%	6.96
730	Government Office Building, Per KSF	22.59	20%	4.52
732	United States Post Office, Per KSF	103.94	20%	20.79
750	Office Park, Per KSF	11.07	20%	2.21
760	Research and Development Center, Per KSF	11.26	20%	2.25
770	Business Park, Per KSF	12.44	20%	2.49
813	Free-Standing Discount Superstore, Per KSF	50.7	20%	10.14
814	Variety Store, Per KSF	63.47	20%	12.69
815	Free-Standing Discount Store, Per KSF	53.12	20%	10.62
816	Hardware/Paint Store, Per KSF	9.14	20%	1.83
817	Nursery (Garden Center), Per KSF	68.1	20%	13.62
820	Shopping Center, Per KSF	37.75	20%	7.55
840	Automobile Sales (New), Per KSF	27.84	20%	5.57
841	Automobile Sales (Used), Per KSF	27.06	20%	5.41
843	Automobile Parts Sales, Per KSF	55.34	20%	11.07
850	Supermarket, Per KSF	106.78	20%	21.36
851	Convenience Market (Open 24 Hours), Per KSF	762.28	20%	152.46

853	Convenience Market with Gasoline Pumps, Per KSF	624.2	20%	124.84
854	Discount Supermarket, Per KSF	90.87	20%	18.17
857	Discount Club, Per KSF	41.8	20%	8.36
862	Home Improvements Superstore, Per KSF	30.74	20%	6.15
875	Department Store, Per KSF	22.88	20%	4.58
880	Pharmacy/Drugstore without Drive-Through Window, Per KSF	90.08	20%	18.02
881	Pharmacy/Drugstore with Drive-Through Window, Per KSF	109.16	20%	21.83
890	Furniture Store, Per KSF	6.3	20%	1.26
899	Liquor Store, Per KSF	101.49	20%	20.30
912	Drive-In Bank, Per KSF	100.03	20%	20.01
925	Drinking Place	N/A	0%	0.00
930	Fast Casual Restaurant, Per KSF	315.17	20%	63.03
931	Quality Restaurant, Per KSF	83.84	20%	16.77
932	High-Turnover (sit-Down) Restaurant, Per KSF	112.18	20%	22.44
933	Fast Food Restaurant without Drive-Through Window, Per KSF	346.23	20%	69.25
934	Fast Food Restaurant with Drive-Through Window, Per KSF	470.95	20%	94.19
936	Coffee / Donut Shop w/o Drive Thru, Per KSF	754.55	20%	150.91
937	Coffee / Donut Shop w/ Drive Thru, Per KSF	820.38	20%	164.08
942	Automotive Care Center, Per KSF	N/A	20%	0.00
944	Gasoline/Service Station, Per KSF	1202.83	20%	240.57
945	Gasoline/Service Station with Convenience Market, Per KSF	1440.02	20%	288.00
949	Car Wash and Detail Center, per stall	156.2	20%	31.24
960	Super Convenience Market/Gas Station, Per KSF	837.58	20%	167.52
970a	Winery (Weekday), Per KSF	45.96	20%	9.19
970b	Winery (Weekend), Per KSF	205.11	20%	41.02