

EXHIBIT 00



JRH

HILLCREST DISTRICT (MD-4)

URBAN GROWTH BOUNDARY
TRANSPORTATION ANALYSIS

CITY OF MEDFORD, OREGON

AUGUST 6, 2015

HILLCREST DISTRICT (MD-4)

URBAN GROWTH BOUNDARY TRANSPORTATION ANALYSIS



RENEWS 6/30/17

CITY OF MEDFORD, OREGON

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TRANSPORTATION ANALYSIS

EXECUTIVE SUMMARY

This document demonstrates that from a transportation engineering perspective the Hillcrest District (MD-4) meets all standards for inclusion in the Medford Urban Growth Boundary (UGB). These standards are contained in Oregon's Statewide Planning Goals, 11: Public Facilities, 12: Transportation, and 14: Urbanization. Furthermore, its location surrounded by and connected to the developed urban transportation system serving the City of Medford makes it superior to all considered alternatives on the east side of Interstate 5.

The conclusions are based on the following facts:

1. MD-4 is an enclave surrounded by the City on all sides. The other UGB extensions are on the perimeter of the City of Medford.
2. Providing transportation connectivity between properties now in the City on either side of MD-4 is not feasible until MD-4 is developed. The procedural hurdles against creating new roads on property outside the UGB make it virtually impossible. Adding MD-4 to the UGB is the first step toward providing this needed connectivity.
3. MD-4 provides better regional connectivity than any of the other alternatives. It is the only alternative providing direct arterial connectivity to three Interstate-5 interchanges. None of these routes requires the use of the congested Highway 62 and Poplar Intersection.
4. The MD-4 annexation will have a stronger influence on reducing vehicle-miles travelled than any of the alternatives east of Interstate 5.
5. The average distance between MD-4 is closer to Medford's four major commercial centers than any other alternative on the east side of I-5.
6. MD-4 provides the best opportunity for transit routing. Locations on the perimeter of the UGB will, for the most part, require dead-end transit connections. MD-4 is surrounded by Major Arterials and Collectors and will provide roadways dividing it both north-south and east-west. This provides ample opportunity for connected transit route development.
7. More than any other alternative, MD-4 will have immediately available transportation capacity. All needed exterior roadways are in place. Widening Foothill Road between Hillcrest Road and McAndrews Road will alleviate an existing capacity constraint and will provide capacity to develop the Hillcrest District. This widening is budgeted and programmed for completion within three years.
8. Many of the other annexations, including MD-2, require the construction of projects that maybe planned but not programmed. They have not been budgeted, they have not been designed; they are project names on a list.
9. MD-4 allows for orderly and efficient development of other urban services. MD-4 is closer to two fire stations than any other development proposed for inclusion to the UGB, it is closer to two hospitals, and its residents will live closer to a high school than any other proposed annexation east of I-5.

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INTRODUCTION

The City of Medford is currently updating its Urban Growth Boundary (UGB) to accommodate anticipated and planned growth. The City has identified nine parcels for consideration for addition to the UGB. For regional planning purposes, they are designated MD-1 through MD-9. This study focuses on the transportation aspect of MD-4, commonly known as the “Hillcrest District.”

Using the standards set by the applicable Oregon land use planning goals, Goals 11, 12, and 14, this document evaluates the Hillcrest District and compares it with the other eight locations under consideration for being placed within the UGB.

MD-4, the Hillcrest District

The Jackson County *Greater Bear Creek Valley Regional Plan* provides the following description of the Hillcrest District: “MD-4 is the site of the 271-acre Hillcrest Orchard property. The area is an Urban Growth Boundary enclave. Not only is the property completely surrounded by the City, it is bordered on three sides by regionally important arterials. North Phoenix Road, a major arterial, borders the entire property to the west. East McAndrews, a major arterial, extends generally along its northeast corner. Hillcrest Road, also an arterial, extends along the entire southern border of the property. The lands directly to the east are master-planned for mixed use development.”

MD-4 differs from all of the areas being proposed for addition to the Medford UGB in that it is the only site that is surrounded by the City. The other potential UGB addition sites are on the outskirts of the City and will extend its boundaries. Developing the interior of the City concentrates its density. Extending the City border outward has the opposite effect.

Previous Studies:

Several documents discuss the transportation implications of expanding the UGB that relate to the current planning commission decision.

- *Greater Bear Creek Valley Regional Plan* published by Jackson County, Oregon (Regional Plan)
- “DRAFT Technical Memorandum # 8: UGB Expansion Alternatives: Qualitative Comparison of Scenarios” June 26, 2013, by Kittelson & Associates (Kittelson Memo)
- Memorandum titled “MD2 Coker Butte Development LLC, Coker Butte Community Project” January 28, 2015, from Kim Parducci of Southern Oregon Transportation Engineering, LLC to Megan LaNier Wattier, Richard Stevens & Associates, Inc. (Parducci Memo)
- June 4, 2015 (for the June 11, 2015 Planning Commission Meeting) Memorandum, Subject: UGB Amendment Project, from Joe Slaughter to the Planning Commission (Memo to Planning Commission)

The Regional Plan identifies and contains findings supporting the inclusion of MD-1 through MD-9 in the urban reserve and ultimately in the UGB; however, it does not provide any detailed transportation analysis.

Memo to the Planning Commission

The Memo to the Planning Commission includes both the Kittelson and Parducci Memos as attachments. It does not provide any additional analysis regarding Transportation, and it does not provide a direct reason to remove a major portion of MD-4 from the recommended areas for UGB expansion. The analysis in the Memo to the Planning Commission does, however, provide several reasons to keep MD-4 in whole, in the recommended UGB expansion area.

In its findings of Oregon Statewide Planning Goal 14: Boundary Location, Page 50 of the Memo to the Planning Commission states: “One of the best indicators for suitability for the first 20-year supply is proximity. Basic principles of urban planning dictate that growth will occur from the center out in order to avoid ‘leap-frog’ development which leads to inefficient use of land and difficult and costly extensions of infrastructure.”

Except for MD-4, all of the nine sites being investigated for inclusion into the UGB are on the perimeter of the City of Medford and will extend its boundaries. MD-4 is fully surrounded by the current City limits.

Furthermore, as it relates to transportation, the findings on page 56 state:

“Selecting parcels closer to the existing UGB not only helps to maximize the efficiency of public infrastructure, it helps the environment by reducing motor vehicle trips. A more compact urban area with mixed-use neighborhoods helps to promote the development and use of transit.

Density and distance both play key roles in developing and maintaining public transit options. ... The more compact urban area with mixed use neighborhoods helps to reduce the amount of pollution caused by motor vehicle traffic by reducing the number of motor vehicle miles traveled; both by providing alternative modes of transportation and by reducing the distance travelled between home, work, shopping, recreation and so forth.”

The Memo to the Planning Commission provides, without explanation, Transportation rankings of MD-4, along with the rest of the potential locations for expansion of the UGB. MD 4 is the highest ranked of all the parcels east of I-5. In line with these comments, the Coarse Filter Scoring, shown in Map 5-1 of Appendix D of The Memo to the Planning Commission, gives the entirety of MD-4 its highest ranking east of I-5. Later in this analysis, there is concrete evidence that this ranking is sound.

Kittelson Memo

The specific evaluation of the transportation aspects of MD-1 through MD-9 is provided in the Kittelson Memo, which is included within the Memo to the Planning Commission. The Kittelson Memo analyzes four scenarios of UGB expansion, and describes the issues and deficiencies of each. It does not evaluate the individual areas proposed for UGB expansion. The Kittleson Memo shows Foothill Road exceeding a Volume –to –Capacity ratio of 1.0 for most of the length between Hillcrest Road and McAndrews Road. Their analysis was conducted before funding for widening that roadway segment was authorized. The completion of that project should alleviate that capacity deficiency and provide to meet the demand placed on it by MD-4.

Although the City directed Kittelson to examine scenarios based on focusing growth in particular groupings, the Planning Department forwarded a growth plan that did not follow any of the Kittelson scenarios. The Staff Report provides no

explanation of how its transportation scoring was reconciled to the Kittelson planning scenario.

Parducci Memo

The Parducci Memo, which is focused on MD-2, merits attention in this analysis for at least two reasons. First, this is the only transportation analysis of any of the Medford UGB proposals that has been published to date. Second, the Memo to the Planning Commission changed their recommendation for the UGB by removing land from MD-4 and retaining all the land for MD-2. As will be described later in this document, Oregon Statewide Planning Goals strongly call for growth decisions to be timely, orderly and efficient. This makes it important that complete and accurate information is used when making land use decisions.

The Parducci Memo notes that Scenario 1 uses the lowest number of acres to meet the density requirements and yet has the highest commercial and industrial mixes of any scenario, which is said to be a positive aspect. The Department's reasoning, as bulleted on Page 8 of its first Staff Report (March 12 Planning Commission), was that distributing parcels around the existing UGB helps to spread the burden of providing services to new development. Concentrating development in a smaller number of areas would overburden infrastructure. In contrast, providing a larger geographic distribution for development can allow increased demand on existing systems to be distributed throughout the systems. Distributing growth generally around the existing UGB would seem to most closely align with the Kittelson Memo's baseline scenario that required the most acreage. Back to the Parducci reports point – Scenario 1's positive aspect of requiring the fewest acres, although at high cost, is not achieved if the full scenario is not followed.

With regard to infrastructure needed to support development, the Parducci Memo notes that Scenario 1 overall is shown to have a high reliance on OR 62 and Foothill Road. In that scenario, the reliance is primarily from property west of OR 62 and north of Vilas and property adjacent to Foothill. Because of the excellent connectivity due to being bounded by Coker Butte Road, Crater Lake Avenue, Vilas Road, and Springbrook Road, it is asserted that the portion of MD-2, south of Vilas Road, will not have the same impact on OR 62 as the overall Kittelson Scenario. This connectivity requires a solid network of "planned" north-south and east-west connections to disperse traffic to Crater Lake Avenue and Springbrook Road.

However, it is important to note that, the planned network is not an existing network, and has not been achieved in large part because development and zone changes in that area are hindered by the already overburdened transportation system.

Of course, inclusion of MD-2 would not have the same impact that inclusion of all the Scenario 1 lands would have. Scenario 1 includes MD-1, MD-3, MD-4 and MD-5 in addition to MD- 2. A proposed growth expansion area abutting both Highway 62 and Vilas Road will clearly be served and have impacts on those facilities. There is no question that residents and businesses in MD-2 will need to use them, and there is no evidence that the existing roadways have the capacity to handle them nor are there planned improvements sufficient to support this additional transportation demand.

Connecting Springbrook Road through MD-2 from Vilas all the way to Coker Butte will also require right-of-way acquisition over intervening land. MD-2's proposed realignment of the Crater Lake Avenue frontage road (which was just recently improved at great expense) between Hwy 62 and Springbrook will provide three parallel north-south arterial roads in very close proximity – hardly helping to distribute that traffic. What it will do is require the City to compensate the developer with SDC credits for building an excessive amount of higher order roads that would provide little benefit to anyone other than the adjacent residents and businesses if the City expands into MD-2.

With regard to the general effect on congestion, except for MD-4, the congestion problems are a general effect of the Kittleson Memo Scenario 1 area, with the logjams at Delta Waters and Poplar intersections on Hwy 62. At present, there are no solutions for those logjams. The problems at these locations are exacerbated by any development adding to traffic along HWY 62.

If the City does not expand into MD-2, the Crater Lake Avenue frontage road already provides all the parallel street capacity needed for Hwy 62 north of Coker Butte Road.

With regard to the general effect on safety, it is noted that the portion of MD-2 south of Vilas Road will have other north-south alternatives and will not be solely dependent on OR 62. However, that connectivity is not currently extended to

MD-2 and will need to be accomplished at significant effort and unfunded expense relative to other candidate areas. The safety issues for Foothill Road, from the standpoint of General Effect, will only be increased by loading more growth to the north on land that has a direct connection by way of Vilas Road, which will continue to be owned and managed by the county as a rural roadway. It is narrow, unsuited for urban levels of traffic, and an important roadway for high-value commercial agriculture operations in that area. Urban drivers will undoubtedly come into conflict with farm equipment drivers and farm workers along Vilas Road (e.g., unsafe passing conditions given almost complete lack of shoulder area).

The last two points (General Effect on Connectivity and General High Cost of Infrastructure) that the Parducci Memo makes also are misdirected. The question is not whether MD-2 will have the same general effects on its own as the overall Scenario 1. Rather, it is whether growth in the Scenario 1 area will be efficiently accommodated, provided for orderly and economic public facilities and services, compares better to other areas as to the environmental/energy/economic/social consequences, and to what extent it will be compatible with nearby agriculture and forest activities on farm and forest lands outside the UGB.

OREGON'S STATEWIDE PLANNING GOALS – MD-4 ANALYSIS

Land use and transportation planning in the State of Oregon is governed by a set of nineteen planning goals that detail the requirements and outline the process to be used for planning and development of property in Oregon. The goals are designed to provide compact urban growth and to protect Oregon's agricultural and forestland.

With regard to transportation-related issues involving the expansion of an urban growth boundary (UGB), three goals come primarily into play – Goal 11: Public Facilities and Services; Goal 12: Transportation; and Goal 14: Urbanization. Each of these is discussed in relationship to the inclusion of MD-4.

The full text of these Goals is provided in Appendix A.

Goal 11: Public Facilities and Services

The objective of Goal 11 is “to plan and develop a timely, orderly and efficient arrangement of public facilities and services to serve as a framework for urban and rural development.” This rule requires a “timely, orderly, and efficient arrangement” of a system that coordinates the types, locations and delivery of public facilities. With regard to transportation issues, this refers to facilities such as police protection, health services, recreation facilities, and community governmental facilities.

Timely Arrangement. A “timely arrangement” means that public facilities should be provided when they are needed and as they are needed. MD-4 is surrounded by developed land within the City of Medford. Transportation facilities needed to support MD-4 are in place or funded. Funding for improvements to Foothill Road are budgeted to provide additional capacity in the next three years.

Existing facilities will provide access to public facilities such as fire, police and education.

Orderly Arrangement. An “orderly arrangement” refers to a logical sequence that allows public facilities to be developed in an incremental manner and not haphazardly trying to connect urban services. An orderly progression of the UGB should include areas in the central portions of the City before extending to the periphery. MD-4 is the only one of the proposed UGB extension areas that is not at the limits of the City and is closer to its center. As is explained elsewhere in this report, public facilities surround this location, and do not need to be extended to this location, and that in itself is an orderly progression and arrangement.

Efficient Arrangement. Because of its central location, MD-4 provides very efficient connections to public facilities. Table 1 shows the relative distance between each of the proposed UGB extension sites to public facilities. Table 1 was developed using Google Maps to provide travel time and distance information to hospitals, fire stations, police, high school, and other public facilities and services.

Table 1: Driving Distance and Travel Time Between UGB Expansion Site and Selected Facilities

City of Medford Facilities		Driving Distance (Miles)										
		East of I-5					Project Site #					
		MD 1	MD 2	MD 3	MD 4	MD 5	MD 6	MD 7	MD 8	MD 9N	MD 9 MID	MD 9 S
Firestation	Medford Fire rescue Station # 2	6.5	5.9	5.8	4	6	3.5	3.2	2.3	2.4	1.5	1.7
	Medford Fire rescue Station # 3	8.1	7.9	4.3	2.5	4.1	1.8	3.1	3.9	5.6	3.1	3.8
	Medford Fire rescue Station # 4	4.6	4.7	4.1	4.3	9.7	5.3	5.5	4.6	1.8	2.1	3.5
	Medford Fire rescue Station # 5	3.8	3.3	2.2	2.7	6.3	4.4	5.7	5.6	3.7	3.4	4.5
	Medford Fire rescue Station # 6	8.4	7.2	3.6	1.8	2	3.4	4.7	5.5	2	5.6	5.4
Average of Closest Two Firestations		4.2	4.0	2.9	2.2	3.1	2.6	3.2	3.1	1.9	1.8	2.6
Hospital	Rouge Valley Medical Center	8.7	7.5	3.9	2.1	7.5	2.4	3.7	4.5	6.2	4.1	4.4
	Providence Hospital	4.7	4.2	3.6	2.8	5.7	3.3	3.3	4.8	3	2.6	3.8
Average of Two Major Hospitals		6.7	5.9	3.8	2.5	6.6	2.9	3.5	4.7	4.6	3.4	4.1
Other Medical Facilities	Medford Medical Urgent Care	8.5	7.4	3.7	1.9	3.2	2.3	2.3	4.4	6.1	3.9	4.3
	Valley Immediate Care	2.8	2.3	2.2	3.7	7.2	5.5	5.5	6	3.2	3.5	4.9
Average of Other Medical Facilities		5.7	4.9	3.0	2.8	5.2	3.9	3.9	5.2	4.7	3.7	4.6
High School	North Medford High School	4.2	3.7	2.3	2.9	6.5	4.6	5.9	5.8	3.9	3.6	4.8
	South Medford High School	7.6	7	7	5.4	7.9	2.3	1.5	1.1	3.4	2.5	1.6
	Nearest High School	4.2	3.7	2.3	2.9	6.5	2.3	1.5	1.1	3.4	2.5	1.6
Shopping Center	Shopping Center # 1 (Costco, Walmart)	2.6	2.1	2.5	4	7.5	5.9	7.2	6.3	3.6	3.6	5.2
	Shopping Center # 2 (Northgate Market place)	4.5	3.9	3.6	3.8	9.2	4.8	5.2	4.3	1.5	1.8	1.8
	Shopping Center # 3 (South Gateway Shopping)	8.1	7.5	5.3	3.5	4.4	1.3	2.5	3.3	5.6	3.8	3
Average of Major Shopping Centers		5.1	4.5	3.8	3.8	7.0	4.0	5.0	4.6	3.6	3.1	3.3

City of Medford Facilities		Travel Time (Minutes)										
		East of I-5					Project Site #					
		MD 1	MD 2	MD 3	MD 4	MD 5	MD 6	MD 7	MD 8	MD 9N	MD 9 MID	MD 9 S
Firestation	Medford Fire rescue Station # 2	15	14	14	11	16	9	8	6	6	5	5
	Medford Fire rescue Station # 3	14	13	8	5	10	6	9	9	10	11	9
	Medford Fire rescue Station # 4	10	9	10	11	15	11	14	12	5	6	9
	Medford Fire rescue Station # 5	9	8	5	5	13	13	16	15	10	10	12
	Medford Fire rescue Station # 6	14	11	6	4	5	10	12	13	14	16	13
Average of Closest Two Firestations		10	9	6	5	8	8	9	8	6	6	7
Hospital	Rouge Valley Medical Center	16	13	8	5	13	8	11	12	12	14	12
	Providence Hospital	11	10	7	6	13	12	12	13	8	9	10
Average of Two Major Hospitals		14	12	8	6	13	10	12	13	10	12	11
Other Medical Facilities	Medford Medical Urgent Care	15	12	7	4	8	7	7	11	11	13	11
	Valley Immediate Care	6	5	6	8	15	11	11	15	8	10	12
Average of Other Medical Facilities		11	9	7	6	12	9	9	13	10	12	12
High School	North Medford High School	11	9	6	7	14	14	17	16	11	12	13
	South Medford High School	17	16	16	13	15	6	5	3	8	7	4
	Nearest High School	11	9	6	7	14	6	5	3	8	7	4
Shopping Center	Shopping Center # 1 (Costco, Walmart)	6	5	7	9	16	12	15	16	9	9	13
	Shopping Center # 2 (Northgate Market place)	9	8	9	9	13	9	13	11	3	5	5
	Shopping Center # 3 (South Gateway Shopping)	14	13	12	9	11	5	8	8	10	11	10
Average of Major Shopping Centers		10	9	9	9	13	9	12	12	7	8	9

Represents Closest Driving Distance and Travel time

Looking at this table, it is clear that MD-4 is closer to and can make better use of public facilities that are already in existence especially when considered against those public facilities that are located east of Interstate 5. East of I-5 there are two fire stations closer to MD-4 than any other UGB extension site is closer to one. With one exception, MD-4 is closer to both regional hospitals than any other of the proposed UGB access areas. That exception is the golf course portion of MD-5 which does have slightly better access to the Rogue Valley Medical center.

MD-4 is closer to the police station and City Hall than any of the other parcels east of Interstate 5. Clearly, inclusion of MD-4 into the UGB is timely, orderly and efficient.

Goal 12: Transportation. The objective of Goal 12 is “to provide and encourage a safe, convenient, and economic transportation system.”

All Modes. Transportation planning in Oregon must consider all modes of transportation including mass transit, air, water, pipeline, rail, highway, bicycle and pedestrian. With the UGB expansion, the most important modes to be considered are highway, mass transit, highway, bicycle, and pedestrian.

Mass Transit. The inclusion of MD-4 will enhance and enable more efficient routing of buses in the community. MD-4 currently is a barrier to connectivity between the developed property to its east and west. Efficient bus transportation requires the ability to connect neighborhoods. All of the other UGB extension sites are at the end of the City limits and would require essentially dead-end routing to be served. MD-4 permits much greater flexibility in transit routing than any of the other potential UGB extension sites.

Highway. The collectors and arterials necessary to service MD-4 are already in place. Inclusion of MD-4 into the UGB will not require construction of additional arterial roadways. The major deficiency in the road system connecting to MD-4 is the lack of capacity on Foothill Road adjacent to the site and to the north. Funds already have been set aside and the project to enhance the deficient section of Foothill Road is in place, and should be completed in a timely manner consistent with the development of MD-4. Hillcrest is not dependent on major state highway improvements and will not require large-scale priority revisions to regional and state Transportation System Plans.

Bicycle and Pedestrian. The inclusion of MD-4 will aid in bicycle and pedestrian movements in two ways. One is that it brings major facilities such as schools, the

downtown, and shopping closer to the population than any of the other proposed UGB sites east of Interstate 5. This means that pedestrians and bicyclists are more likely to walk or bike to these facilities. The second point is that regional bicycle facilities are currently in place adjacent to MD-4 on McAndrews Road and will be included in the improvements to Foothill Road. These facilities are not additions to or newly needed as are pedestrian and bicycle facilities for the other potential UGB sites. They exist for MD-4.

Based on Local, Regional and State Transportation Needs. The transportation facilities required for MD-4 are already in place and have been developed in a process consistent with what is required for Goal 12. Because MD-4 is already serviced by regional connectors, additional construction to accommodate it to the extent which is required at the other UGB expansion sites east of Interstate 5 is substantially less. There is one other aspect of the MD-4 inclusion in the UGB which is worthy of consideration: MD-4 has reasonably direct arterial connections to the north Medford interchange, the south Medford interchange and the Phoenix interchange to Interstate 5. This means that there is exceptional regional and statewide connectivity to this site. It should also be noted that none of the connections require the use of Highway 62 through Poplar Drive, which is one of the most congested locations in the Rogue Valley.

Minimize Adverse Social, Economic and Environmental Impacts and Costs. Because MD-4 is entirely within the City and is already surrounded by the necessary roadway systems, it will not add the adverse effects accompanying the development of new systems. The cost of regional facilities to accommodate MD-4 inclusion in the UGB will be minimal. MD-4 is better served by existing public (police, fire, education) and private (shopping and hospital) facilities than any of the other proposed UGB expansion areas, and as such does not have the level of indirect economic and environmental impacts and costs as the other UGB expansion candidates. Also, the location and the enhancement of the ability to be serviced by alternative modes will reduce the social impacts of this development.

Avoid Principal Reliance on One Mode. As discussed above, the addition of MD-4 to the UGB will enhance bicycle, pedestrian and mass transit modes, and its proximity to major public and private facilities will encourage these alternative modes more than will expansion of the UGB in areas on the perimeter of the City.

Meet the Needs of the Transportation Disadvantaged. As described above, the inclusion of MD-4 will enhance mass transit connectivity throughout the area and thus help meet the needs of the transportation disadvantaged. In addition, the

proximity of MD-4 to other services will make the use of Dial-a-Ride transit services much more efficient than the other UGB expansion sites. Its proximity to common destination sites such as shopping, hospitals, and City Center make the service to the area much more efficient than it would be for locations at the City limits.

Conserve Energy. As shown in Table 1, the distance between MD-4 and the public and private facilities most commonly used by the future residents of it are closer than they are at the other sites. This conserves energy for transportation between MD-4 and those locations. Energy is also conserved because the energy required to construct the roadways to service it will be less as the roadways exist already. A third way energy is conserved is that MD-4 has greater connectivity to all areas of the City and to the State because of its central location and connections to Interstate-5.

Goal 14: Urbanization. The objective of Goal 14 is to “provide for an orderly and efficient transition from rural to urban use, accommodate urban population and urban employment inside urban growth boundaries, to ensure efficient use of land, and to provide for livable communities.”

Goal 14 is divided into two sections: land need and boundary location. Boundary location is important for the transportation issues to the issues contained in this report. There are several criteria established in Goal 14 that are appropriate for consideration. These are discussed below.

Efficient Accommodation of Identified Land Needs. This was discussed in Goal 11. In there, it was shown that MD-4 is the most efficient location from a transportation standpoint. All of the roadways are in place, essential public and private services are closer to MD-4 than the other locations, and it is completely surrounded by the City. MD-4 provides the most efficient use of existing transportation services because it uses already-in-place transportation facilities with adequate capacity and does not rely on single loaded roadway facilities on the fringe.

Orderly and Economic Provision of Public Facilities and Services. This was also discussed in Goal 11. The inclusion of MD-4 into the UGB is orderly and economic because its connections exist, it does not require the addition of new public transportation facilities to be developed, and its proximity to other services is better.

Comparative Environmental, Economic, Energy, and Social Consequences.

These were discussed in the Goal 12 analysis. Again, because of its proximity to services and because the transportation infrastructure is already in place, the development of MD-4 will facilitate transit routing and encourage bicycling and pedestrian activity. These all have positive environmental, economic, and energy consequences. The provision of all modes and the opportunity to better serve the transit disadvantaged help to improve social consequences. The development of the Hillcrest District by its proximity to already available urban services will efficiently produce positive environmental, economic, energy and social outcomes.

Compatibility of Proposed Urban Uses with Nearby Agricultural and Forest Activities Occurring on Farm and Forest Land Outside the UGB. MD-4 easily meets these criteria better than any of the other proposed UGB extension areas. Simply put, MD-4 is surrounded by land that is not outside the UGB, it is inside the City.

CONCLUSION:

The Hillcrest District, MD-4, is unique in that it is the only parcel of land being proposed for inclusion in the Urban Growth Boundary that has a central location and is entirely surrounded by property already in the City of Medford. This has very positive transportation benefits. The regional transportation system needed to service the property is already in place. Its central location makes it closer to public and private services. These factors mean that it meets the applicable criteria under Oregon's Statewide Planning Goals. From a transportation standpoint, it is the logical choice.

APPENDIX A

TEXT OF OREGON'S STATEWIDE PLANNING GOALS AND GUIDELINES

GOAL 11: PUBLIC FACILITIES AND SERVICES

GOAL 12: TRANSPORTATION

GOAL 14: URBANIZATION

Oregon's Statewide Planning Goals & Guidelines

GOAL 11: PUBLIC FACILITIES AND SERVICES

OAR 660-015-0000(11)

To plan and develop a timely, orderly and efficient arrangement of public facilities and services to serve as a framework for urban and rural development.

Urban and rural development shall be guided and supported by types and levels of urban and rural public facilities and services appropriate for, but limited to, the needs and requirements of the urban, urbanizable, and rural areas to be served. A provision for key facilities shall be included in each plan. Cities or counties shall develop and adopt a public facility plan for areas within an urban growth boundary containing a population greater than 2,500 persons. To meet current and long-range needs, a provision for solid waste disposal sites, including sites for inert waste, shall be included in each plan.

Counties shall develop and adopt community public facility plans regulating facilities and services for certain unincorporated communities outside urban growth boundaries as specified by Commission rules.

Local Governments shall not allow the establishment or extension of sewer systems outside urban growth boundaries or unincorporated community boundaries, or allow extensions of sewer lines from within urban growth boundaries or unincorporated community boundaries to serve land outside those boundaries, except where the new or extended

system is the only practicable alternative to mitigate a public health hazard and will not adversely affect farm or forest land.

Local governments may allow residential uses located on certain rural residential lots or parcels inside existing sewer district or sanitary authority boundaries to connect to an existing sewer line under the terms and conditions specified by Commission rules.

Local governments shall not rely upon the presence, establishment, or extension of a water or sewer system to allow residential development of land outside urban growth boundaries or unincorporated community boundaries at a density higher than authorized without service from such a system.

In accordance with ORS 197.180 and Goal 2, state agencies that provide funding for transportation, water supply, sewage and solid waste facilities shall identify in their coordination programs how they will coordinate that funding with other state agencies and with the public facility plans of cities and counties.

A Timely, Orderly, and Efficient Arrangement – refers to a system or plan that coordinates the type, locations and delivery of public facilities and services in a manner that best supports the existing and proposed land uses.

Rural Facilities and Services – refers to facilities and services suitable and appropriate solely for the needs of rural lands.

Urban Facilities and Services – Refers to key facilities and to appropriate types and levels of at least the following: police protection; sanitary facilities; storm drainage facilities; planning, zoning and subdivision control; health services; recreation facilities and services; energy and communication services; and community governmental services.

Public Facilities Plan – A public facility plan is a support document or documents to a comprehensive plan. The facility plan describes the water, sewer and transportation facilities which are to support the land uses designated in the appropriate acknowledged comprehensive plan or plans within an urban growth boundary containing a population greater than 2,500.

Community Public Facilities Plan – A support document or documents to a comprehensive plan applicable to specific unincorporated communities outside UGBs. The community public facility plan describes the water and sewer services and facilities which are to support the land uses designated in the plan for the unincorporated community.

Water system – means a system for the provision of piped water for human consumption subject to regulation under ORS 448.119 to 448.285.

Extension of a sewer or water system – means the extension of a pipe, conduit, pipeline, main, or other physical

component from or to an existing sewer or water system, as defined by Commission rules.

GUIDELINES

A. PLANNING

1. Plans providing for public facilities and services should be coordinated with plans for designation of urban boundaries, urbanizable land, rural uses and for the transition of rural land to urban uses.

2. Public facilities and services for rural areas should be provided at levels appropriate for rural use only and should not support urban uses.

3. Public facilities and services in urban areas should be provided at levels necessary and suitable for urban uses.

4. Public facilities and services in urbanizable areas should be provided at levels necessary and suitable for existing uses. The provision for future public facilities and services in these areas should be based upon: (1) the time required to provide the service; (2) reliability of service; (3) financial cost; and (4) levels of service needed and desired.

5. A public facility or service should not be provided in an urbanizable area unless there is provision for the coordinated development of all the other urban facilities and services appropriate to that area.

6. All utility lines and facilities should be located on or adjacent to existing public or private rights-of-way to avoid dividing existing farm units.

7. Plans providing for public facilities and services should consider as a major determinant the carrying capacity of the air, land and water resources of the planning area. The land

conservation and development action provided for by such plans should not exceed the carrying capacity of such resources.

B. IMPLEMENTATION

1. Capital improvement programming and budgeting should be utilized to achieve desired types and levels of public facilities and services in urban, urbanizable and rural areas.

2. Public facilities and services should be appropriate to support sufficient amounts of land to maintain an adequate housing market in areas undergoing development or redevelopment.

3. The level of key facilities that can be provided should be considered as a principal factor in planning for various densities and types of urban and rural land uses.

4. Plans should designate sites of power generation facilities and the location of electric transmission lines in areas intended to support desired levels of urban and rural development.

5. Additional methods and devices for achieving desired types and levels of public facilities and services should include but not be limited to the following: (1) tax incentives and disincentives; (2) land use controls and ordinances; (3) multiple use and joint development practices; (4) fee and less-than-fee acquisition techniques; and (5) enforcement of local health and safety codes.

6. Plans should provide for a detailed management program to assign respective implementation roles and responsibilities to those governmental bodies operating in the planning area and having interests in carrying out the goal

Oregon's Statewide Planning Goals & Guidelines

GOAL 12: TRANSPORTATION

OAR 660-015-0000(12)

To provide and encourage a safe, convenient and economic transportation system.

A transportation plan shall (1) consider all modes of transportation including mass transit, air, water, pipeline, rail, highway, bicycle and pedestrian; (2) be based upon an inventory of local, regional and state transportation needs; (3) consider the differences in social consequences that would result from utilizing differing combinations of transportation modes; (4) avoid principal reliance upon any one mode of transportation; (5) minimize adverse social, economic and environmental impacts and costs; (6) conserve energy; (7) meet the needs of the transportation disadvantaged by improving transportation services; (8) facilitate the flow of goods and services so as to strengthen the local and regional economy; and (9) conform with local and regional comprehensive land use plans. Each plan shall include a provision for transportation as a key facility.

Transportation -- refers to the movement of people and goods.

Transportation Facility -- refers to any physical facility that moves or assists in the movement of people and goods excluding electricity, sewage and water.

Transportation System -- refers to one or more transportation facilities that are planned, developed, operated and maintained in a coordinated manner to supply continuity of movement between modes, and within and between geographic and jurisdictional areas.

Mass Transit -- refers to any form of passenger transportation which

carries members of the public on a regular and continuing basis.

Transportation Disadvantaged -- refers to those individuals who have difficulty in obtaining transportation because of their age, income, physical or mental disability.

GUIDELINES

A. PLANNING

1. All current area-wide transportation studies and plans should be revised in coordination with local and regional comprehensive plans and submitted to local and regional agencies for review and approval.

2. Transportation systems, to the fullest extent possible, should be planned to utilize existing facilities and rights-of-way within the state provided that such use is not inconsistent with the environmental, energy, land-use, economic or social policies of the state.

3. No major transportation facility should be planned or developed outside urban boundaries on Class 1 and II agricultural land, as defined by the U.S. Soil Conservation Service unless no feasible alternative exists.

4. Major transportation facilities should avoid dividing existing economic farm units and urban social units unless no feasible alternative exists.

5. Population densities and peak hour travel patterns of existing and planned developments should be considered in the choice of transportation modes for trips taken by persons. While high density developments with concentrated trip origins and destinations should be designed to be principally served by mass transit,

low-density developments with dispersed origins and destinations should be principally served by the auto.

6. Plans providing for a transportation system should consider as a major determinant the carrying capacity of the air, land and water resources of the planning area. The land conservation and development actions provided for by such plans should not exceed the carrying capacity of such resources.

B. IMPLEMENTATION

1. The number and location of major transportation facilities should conform to applicable state or local land use plans and policies designed to direct urban expansion to areas identified as necessary and suitable for urban development. The planning and development of transportation facilities in rural areas should discourage urban growth while providing transportation service necessary to sustain rural and recreational uses in those areas so designated in the comprehensive plan.

2. Plans for new or for the improvement of major transportation facilities should identify the positive and negative impacts on: (1) local land use patterns, (2) environmental quality, (3) energy use and resources, (4) existing transportation systems and (5) fiscal resources in a manner sufficient to enable local governments to rationally consider the issues posed by the construction and operation of such facilities.

3. Lands adjacent to major mass transit stations, freeway interchanges, and other major air, land and water terminals should be managed and controlled so as to be consistent with and supportive of the land use and development patterns identified in the comprehensive plan of the jurisdiction within which the facilities are located.

4. Plans should provide for a detailed management program to assign respective implementation roles and responsibilities to those governmental bodies operating in the planning area and having interests in carrying out the goal.

Oregon's Statewide Planning Goals & Guidelines

GOAL 14: URBANIZATION

OAR 660-015-0000(14)

(Effective April 28, 2006)

To provide for an orderly and efficient transition from rural to urban land use, to accommodate urban population and urban employment inside urban growth boundaries, to ensure efficient use of land, and to provide for livable communities.

Urban Growth Boundaries

Urban growth boundaries shall be established and maintained by cities, counties and regional governments to provide land for urban development needs and to identify and separate urban and urbanizable land from rural land. Establishment and change of urban growth boundaries shall be a cooperative process among cities, counties and, where applicable, regional governments. An urban growth boundary and amendments to the boundary shall be adopted by all cities within the boundary and by the county or counties within which the boundary is located, consistent with intergovernmental agreements, except for the Metro regional urban growth boundary established pursuant to ORS chapter 268, which shall be adopted or amended by the Metropolitan Service District.

Land Need

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

(1) Demonstrated need to accommodate long range urban population, consistent with a 20-year

population forecast coordinated with affected local governments; and

(2) Demonstrated need for housing, employment opportunities, livability or uses such as public facilities, streets and roads, schools, parks or open space, or any combination of the need categories in this subsection (2).

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

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

Boundary Location

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

(1) Efficient accommodation of identified land needs;

(2) Orderly and economic provision of public facilities and services;

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

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

Urbanizable Land

Land within urban growth boundaries shall be considered available for urban development consistent with plans for the provision of urban facilities and services. Comprehensive plans and implementing measures shall manage the use and division of urbanizable land to maintain its potential for planned urban development until appropriate public facilities and services are available or planned.

Unincorporated Communities

In unincorporated communities outside urban growth boundaries counties may approve uses, public facilities and services more intensive than allowed on rural lands by Goal 11 and 14, either by exception to those goals, or as provided by commission rules which ensure such uses do not adversely affect agricultural and forest operations and interfere with the efficient functioning of urban growth boundaries.

Single-Family Dwellings in Exception Areas

Notwithstanding the other provisions of this goal, the commission may by rule provide that this goal does not prohibit the development and use of one single-family dwelling on a lot or parcel that:

- (a) Was lawfully created;
- (b) Lies outside any acknowledged urban growth boundary or unincorporated community boundary;
- (c) Is within an area for which an exception to Statewide Planning Goal 3 or 4 has been acknowledged; and
- (d) Is planned and zoned primarily for residential use.

Rural Industrial Development

Notwithstanding other provisions of this goal restricting urban uses on rural

land, a county may authorize industrial development, and accessory uses subordinate to the industrial development, in buildings of any size and type, on certain lands outside urban growth boundaries specified in ORS 197.713 and 197.714, consistent with the requirements of those statutes and any applicable administrative rules adopted by the Commission.

GUIDELINES

A. PLANNING

1. Plans should designate sufficient amounts of urbanizable land to accommodate the need for further urban expansion, taking into account (1) the growth policy of the area; (2) the needs of the forecast population; (3) the carrying capacity of the planning area; and (4) open space and recreational needs.

2. The size of the parcels of urbanizable land that are converted to urban land should be of adequate dimension so as to maximize the utility of the land resource and enable the logical and efficient extension of services to such parcels.

3. Plans providing for the transition from rural to urban land use should take into consideration as to a major determinant the carrying capacity of the air, land and water resources of the planning area. The land conservation and development actions provided for by such plans should not exceed the carrying capacity of such resources.

4. Comprehensive plans and implementing measures for land inside urban growth boundaries should encourage the efficient use of land and the development of livable communities.

B. IMPLEMENTATION

1. The type, location and phasing of public facilities and services are factors

which should be utilized to direct urban expansion.

2. The type, design, phasing and location of major public transportation facilities (i.e., all modes: air, marine, rail, mass transit, highways, bicycle and pedestrian) and improvements thereto are factors which should be utilized to support urban expansion into urbanizable areas and restrict it from rural areas.

3. Financial incentives should be provided to assist in maintaining the use and character of lands adjacent to urbanizable areas.

4. Local land use controls and ordinances should be mutually supporting, adopted and enforced to integrate the type, timing and location of public facilities and services in a manner to accommodate increased public demands as urbanizable lands become more urbanized.

5. Additional methods and devices for guiding urban land use should include but not be limited to the following: (1) tax incentives and disincentives; (2) multiple use and joint development practices; (3) fee and less-than-fee acquisition techniques; and (4) capital improvement programming.

6. Plans should provide for a detailed management program to assign respective implementation roles and responsibilities to those governmental bodies operating in the planning area and having interests in carrying out the goal.