



City of Medford

Planning Department

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MEMORANDUM

Subject UGB Amendment, Phase 2: ESA Boundary Amendment
Supplemental Findings memo no. 1

Additional explanation of how staff selected areas from the ESAs to include in its recommendation and changes made by the Planning Commission

File no. CP-14-114

To Mayor and City Council

From John Adam, Principal Planner, Comprehensive Planning

Date September 9, 2015 *for 09-17-2015 meeting*

PROCESS

The purpose of this memo is to further explain how properties, or groups of properties, were either excluded or included in staff's recommendation and to clear up any misconception about how the scores for proximity, parcel size, and serviceability for water, sewer, and transportation were used. As explained on page 12 of the Findings (page 43 in the August 6, 2015 Council agenda packet):

The results of the scoring for all five factors—proximity, parcelization, water, sewer, and transportation—were used to guide the decision on where to expand the City's UGB. In addition to the scoring of the properties for the five factors, the City also had to consider the obligations of the Regional Plan Element. [...] The City's conceptual plans for the urban reserve are provided as Appendix K. The scored properties were not ranked on a parcel-by-parcel basis, but rather, areas were selected based on their scores for the five factors and based on the area's ability to meet Regional Plan obligations. The mix of land uses in the area was an important consideration regarding the orderly and economic provision of public facilities and services.

Staff purposefully did not compile an aggregate score for each of the properties and then select the properties with the highest scores because there were other factors that needed to be considered in the selection. Staff has not created a map showing this kind of composite ranking; it is unnecessary and it would be misleading. Since the selection of parcels into staff's recommendation cannot be easily shown on a chart, table, or map, the following information better explains the selection, or exclusion, of specific groups of properties.

The coarse filter process and the resulting External Study Areas (ESAs) are explained on pages 40–42 of the Agenda¹. Page 40 provides explanation about why the process was used and page 41 provides finer detail about how the scores were used in selecting properties for the ESAs. Since this information about the coarse filter has already been provided this memo will focus on the selection process after the coarse filter, that is, the selection of properties from the ESAs into staff’s recommendation.

Finally, there has been some testimony claiming that the selection process staff used to come up with the ESAs closed out other properties from further consideration. That assertion accords far too much power to staff. Under the law, all areas in an urban reserve are first priority for inclusion. The City Council can select any areas it chooses from the urban reserve for the expansion. However, there ought to be some consideration of which areas make sense to include now and which do not...thus one circles back to the beginning of the process. The Council can judge whether the reasoning was largely rational, or whether it was flawed at every turn.

AREA-BY-AREA SUMMARIES

MD-1 east

This portion of MD-1 had moderate scores for proximity and parcelization but was retained for further consideration because of its proximity to the existing and future routes of Highway 62. While the southern half of this area scored well for proximity it scored poorly for parcelization. For the northern half of this area the coarse filter scores were reversed, with better overall scores for parcelization and poorer overall scores for proximity. The water scores for this area were good-to-moderate, the sewer scores were good, and the transportation scores were poor. All of this portion of MD-1 was identified for employment use (commercial) on the conceptual plan. Much of the southern half of this area is in residential use and the inclusion of the land into the UGB with either a commercial or industrial designation would be inconsistent with the existing uses. Also, the existence of homes in the area makes the coordinated commercial or industrial development of the area more expensive and more difficult compared to other locations. The northern portion of this area is less parcelized and does not contain the residential uses like the southern portion. Portions of MD-1, including the northern half of this portion, are the only parts of the urban reserve that would extend the UGB beyond its existing extent in any direction (with the exception of Prescott and Chrissy). That is, if a box were drawn around the extremities of the existing UGB, all of the rest of the urban reserve areas would work to fill in that existing box. This portion of MD-1 would fall outside of that box. The combination of the poor transportation score along with the fact that the inclusion of this area would extend the City boundary along

¹ Commission Report, 7/21/2015, Exhibit B, pp. 9–11

an already strained corridor made the inclusion of this area less desirable than other options.

Summary—inefficient accommodation of identified land needs.

MD-2 north of Vilas Road

This portion of MD-2 scored fairly well for both parcel size and proximity. It scored moderate-to-poor for water, good for sewer, and moderately poor for transportation. This property did not score as well as most, if not all, of the other properties included in staff's recommendation but was selected because of its suitability to provide for a portion of the City's identified industrial land need over the next 20 years. Because each of the urban reserve areas that have a residential component are required to also have an employment component, much of the identified commercial needs were met in these mixed-use urban reserve areas. This was done to avoid placing needed industrial land in residential neighborhoods.

Summary—efficient accommodation of a specific identified land need (industrial) but not the best compared to other areas for other identified land needs.

MD-2 south of Vilas Road

This portion of MD-2 scored well for both parcel size and proximity. It scored good-to-moderate-to-poor for water, good for sewer, and moderately poor for transportation. This portion of MD-2 benefitted from the fact that it is well situated to meet a sizable portion of the City's identified employment land need. Its location along Crater Lake Hwy and Crater Lake Ave, relatively close to the city center (closer than any other portion of the urban reserve along this corridor), make it well suited for future commercial development. Approximately 37% of this portion of MD-2 is slated for commercial uses. While this area scores moderately poorly for transportation, its inclusion also provides for opportunities to improve the transportation system in the vicinity. This property helps to facilitate the realignment of Crater Lake Ave to provide greater separation from Crater Lake Hwy. This is essential in order to fix the intersection of Vilas with Crater Lake Hwy and Crater Lake Ave. This property also helps to facilitate the extension of Springbrook from Coker Butte to Vilas. This extension will provide an additional parallel north-south route in the area which will help to alleviate some of the congestion on the existing north-south routes.

Summary—efficient accommodation of identified land needs (good mix of uses and large commercial component) and orderly and economic provision of public facilities and services (street connections).

MD-3 north of Coker Butte Road

This portion of MD-3 had a moderate combined score for parcel size and proximity. It scored poor for water, moderate for sewer, and moderate poor for transportation. The location of the area north of Coker Butte Road and east of Coker Butte has the effect of isolating this area from existing development and future development in MD-2 and other portions of MD-3. The area has been identified for only low-density residential development in the conceptual plan and does not help to meet any portion of the employment land need. Staff concluded that there were other areas that could better meet the City's identified land need.

Summary—inefficient accommodation of identified land needs (single use) and does not help provide orderly and economic provision of public facilities and services (isolated and does not provide street connections).

MD-3 south of Coker Butte, north of Owen, and west of McLoughlin

This portion of MD-3 had a good combined score for parcel size and proximity. It scored good-to-moderate-to-poor for water, and moderate for sewer and transportation. The overall scores for this property were fairly moderate. This area benefited from the fact that it had a good mix of identified land uses on the conceptual plan and its inclusion in the UGB could help with higher-order street connections (Cheltenham and McLoughlin).

Summary—efficient accommodation of identified land needs (good mix of uses) and orderly and economic provision of public facilities and services (street connections).

MD-3 south of Coker Butte, north of Owen, and east of McLoughlin

This portion of MD-3 had a good combined score for parcel size and proximity. It scored good and poor for water, and moderate for sewer and transportation. The overall scores for this property were fairly moderate. While this area had a good mix of identified land uses on the conceptual plan it did not help to connect any higher-order streets and was seen as less desirable than other portions of MD-3 for that reason.

Summary—efficient accommodation of identified land needs (good mix of uses) but does not help provide orderly and economic provision of public facilities and services (no street connections).

MD-3 south of Coker Butte, south of Owen, and east of McLoughlin

This portion of MD-3 had a good combined score for parcel size and proximity. It scored good for water, and moderate for sewer and transportation. The overall scores for this property were fairly good. This area benefited from the fact that it had a good mix of

identified land uses on the conceptual plan and its inclusion in the UGB could help with the connection of Owen Drive from Springbrook out to Foothill.

Summary—efficient accommodation of identified land needs (good mix of uses) and orderly and economic provision of public facilities and services (street connections).

MD-4

MD-4 had a good combined score for parcel size and proximity. It scored good-to-moderate for water, moderately poor for sewer, and fairly good for transportation. This area had moderately good scores overall. The area benefited from the good mix of identified land uses, the fact that it is surrounded by the existing UGB, and its ability to help connect water, sewer, and transportation infrastructure in the area. Concerns with the property included the existence of large tracts of undeveloped land in the vicinity, which if they were to remain undeveloped would hinder the orderly and economic provision of facilities and services. Also, the continued investment in the property for agricultural uses also raises a concern with both the ability to meet the identified land needs and the orderly provisions of public facilities and services. On the whole the scores were good and staff decided it was best to allow the Planning Commission and/or the Council to decide if the concerns about the property should play a larger role in the decision regarding its inclusion.

Summary—efficient accommodation of identified land needs (good mix of uses) and orderly and economic provision of public facilities and services (street connections) considering only the scores and identified land uses.

MD-5 north of Barnett Road

This portion of MD-5 had a good combined score for parcel size and proximity but the proximity scores are misleading. These scores show the proximity to the existing UGB rather than to existing development. Some of this area would require the extension of services through undeveloped (non-urbanized) portions of the existing UGB prior to development. Some portions of the existing UGB (north of Cherry Lane) lack water and sewer service because these services have not been extended through the existing UGB up to this point. The availability of undeveloped land within the vicinity can be seen in the City's Buildable Lands Inventory. Much of this land was added to the UGB during the last amendment and it has not developed out as quickly as anticipated. This has led to a large concentration of developable land in the southeast portion of the UGB. Further development of the properties within the UGB is needed in order to serve land on the eastern extreme. This fact plays a large role in the overall poor scores the area received for water and transportation. The inclusion of this area does have the benefit of providing additional flexibility for providing sewer services to properties within the existing

UGB but its inclusion could also add additional land to the UGB that cannot be readily served. It also can contribute to linking the trail system on the east side.

The conceptual plan for the area includes low- and medium-density residential and service commercial.

Summary—if the area serves to extend the Southeast Plan and the trail system, its inclusion will achieve a goal of the Regional Plan Element—to have mixed-use, walkable neighborhoods—that counterbalances some of the inefficiencies.

MD-5 south of Coal Mine and east of North Phoenix Road

This portion of MD-5 had a moderate combined score for parcel size and proximity. It scored moderate for water, sewer, and transportation. This property is average in every way. It benefited from its proximity to a planned elementary school and its mix of uses. This area is slated for commercial and high and medium-density residential development. The commercial uses are appropriate for the property's location along North Phoenix Rd and the planned medium and high-density residential developments benefit from, and are a benefit to, the planned elementary school.

Summary—although this area had moderate scores it serves to efficiently accommodate the City's identified land needs for both commercial and higher-density residential development. The types of proposed uses adjacent to existing and planned uses help in the orderly and economic provision of public facilities and services.

MD-5 west of North Phoenix Road and north of South Stage Road (Centennial)

This portion of MD-5 had a fairly good combined score for proximity and parcelization. The area scored good-to-moderate for water, fairly good for sewer, and moderate for transportation. Overall the area had fairly moderate scores. This area benefited from the fact that it has been planned for a specific identified need in the Housing Element (housing for an ageing population, Housing Element pg. 87 (see also pg. 71)) it helps to meet a portion of the employment land need (along North Phoenix Rd and the future extension of S, Stage Rd) and it helps in the orderly and economic provision of public facilities and services for the area when taken along with the future employment center south of South Stage Road.

Summary—efficient accommodation of identified land need (both the residential development for an ageing population and the employment portions). Relatively neutral on the orderly and economic provision of public facilities and services as a standalone but better when considered in an area-wide context.

MD-5 west of North Phoenix Road and south of South Stage Road

This portion of MD-5 had a fairly good combined score for proximity and parcelization. The area scored poor for water, good for sewer, and moderate for transportation. Overall the area had fairly moderate scores. This area benefited from the fact that it has been planned for a future employment center (office park and/or large business campus) and is located along the route of the planned South Stage Road extension. This portion of the urban reserve is the only area planned for this type of use and its inclusion in the UGB is tied to the City's economic development efforts.

Summary—efficient accommodation of a specific identified land need (employment). Relatively neutral on the orderly and economic provision of public facilities and services. While the inclusion of this property in the UGB will help to facilitate the extension of South Stage Road the area as a whole will require a fair amount of investment to develop because of its location relative to existing development.

MD-6

MD-6 had a good score for proximity and a poor score for parcelization. In general the properties on the west side of the urban reserve are smaller than the properties on the east side. Although most of these areas scored poorly for parcel size they were retained for further consideration in order to maintain a balanced distribution of land around the existing UGB in the ESAs. The area scored good and moderate for water and good for sewer and transportation. Like other properties on the west side this property had relatively easy access to existing public facilities and services. It is also well suited to provide for a portion of the City's identified industrial and commercial land need over the next 20 years.

There is a portion of property west of Harry & David's facilities that staff left out of the ESAs. It would require a lot partition so as not to be split by the UGB as the neighboring property is now. It also does not have direct connections to either Garfield Street or South Stage Road, making it unattractive for inclusion.

Summary—efficient accommodation of identified land needs (employment) and orderly and economic provision of public facilities and services (easy connections to existing infrastructure).

MD-7 north

This portion of MD-7 had a good score for proximity and a moderate score for parcelization. In general the properties on the west side of the urban reserve are smaller than the properties on the east side. Although most of these areas scored poorly for parcel size they were retained for further consideration in order to maintain a balanced

distribution of land around the existing UGB in the ESAs. The area scored good for water, sewer, and transportation. The area is well situated for the extension of services. It is also well suited to provide for a portion of the City's identified employment land need over the next 20 years.

Summary—efficient accommodation of identified land needs (employment) and orderly and economic provision of public facilities and services (easy connections to existing infrastructure).

MD-7 mid and south

This portion of MD-7 had a good score for proximity and a moderate score for parcelization. In general the properties on the west side of the urban reserve are smaller than the properties on the east side. Although most of these areas scored poorly for parcel size they were retained for further consideration in order to maintain a balanced distribution of land around the existing UGB in the ESAs. A conceptual master plan has been submitted for the area showing a coordinated plan for development. This plan helps to reduce concerns regarding parcelization and the fragmented development that can result from it. The area scored good and poor for water, good for sewer, and good for transportation. With the exception of parcel size, and water for a portion of the area, all scores for this area were good. The area is well situated for the extension of services. The area also has a good mix of land uses and can be developed to meet the density, mixed-use, and walkability requirements of the Regional Plan.

Summary—efficient accommodation of identified land needs (good mix of uses) and orderly and economic provision of public facilities and services (easy connections to existing infrastructure).

MD-8

MD-8 had a good score for proximity and a moderately poor score for parcelization. In general the properties on the west side of the urban reserve are smaller than the properties on the east side. Although most of these areas scored poorly for parcel size they were retained for further consideration in order to maintain a balanced distribution of land around the existing UGB in the ESAs. A conceptual master plan has been submitted for the area showing a coordinated plan for development. This plan helps to reduce concerns regarding parcelization and the fragmented development that can result from it. The area scored good for water, sewer, and transportation. With the exception of parcel size, all scores for this area were good. The area is well situated for the extension of services. The area also has a good mix of land uses and can be developed to meet the density, mixed-use, and walkability requirements of the Regional Plan.

Summary—efficient accommodation of identified land needs (good mix of uses) and orderly and economic provision of public facilities and services (easy connections to existing infrastructure).

MD-9 south

This portion of MD-9 had a good score for proximity and a moderately poor score for parcelization. In general the properties on the west side of the urban reserve are smaller than the properties on the east side. Although most of these areas scored poorly for parcel size they were retained for further consideration in order to maintain a balanced distribution of land around the existing UGB in the ESAs. Many of the property owners have demonstrated a willingness to plan future development together. This coordinated approach helps to reduce concerns regarding parcelization and the fragmented development that can result from it. The area scored good for water, sewer, and transportation. With the exception of parcel size, all scores for this area were good. The area is well situated for the extension of services. The area also has a good mix of land uses and can be developed to meet the density, mixed-use, and walkability requirements of the Regional Plan.

Summary—efficient accommodation of identified land needs (good mix of uses) and orderly and economic provision of public facilities and services (easy connections to existing infrastructure).

MD-9 mid

This portion of MD-9 had a good score for proximity and a moderately poor score for parcelization. In general the properties on the west side of the urban reserve are smaller than the properties on the east side. Although most of these areas scored poorly for parcel size they were retained for further consideration in order to maintain a balanced distribution of land around the existing UGB in the ESAs. This area is only divided into two properties. The poor scores for parcel size are not due to parcelization, but rather, the fact that this area is quite small compared to other portions of the urban reserve. The small size of this area helps to eliminate concerns regarding parcelization and the fragmented development that can result from it. The area scored good for water, sewer, and transportation. With the exception of parcel size, all scores for this area were good. The area is well situated for the extension of services. The area has only one identified land use because it is not large enough to accommodate a useful mix of uses but it can be developed to meet the density, mixed-use, and walkability requirements of the Regional Plan.

Summary—efficient accommodation of identified land needs (single use but small in scale) and orderly and economic provision of public facilities and services (easy connections to existing infrastructure).

MD-9 north

This portion of MD-9 had a good score for proximity and a moderately poor score for parcelization. In general the properties on the west side of the urban reserve are smaller than the properties on the east side. Although most of these areas scored poorly for parcel size they were retained for further consideration in order to maintain a balanced distribution of land around the existing UGB in the ESAs. The majority of the properties in the area are held under a common ownership which helps to reduce concerns regarding parcelization and the fragmented development that can result from it. The area scored good for water, sewer, and transportation. With the exception of parcel size, all scores for this area were good. The area is well situated for the extension of services. The area also has a good mix of land uses and can be developed to meet the density, mixed-use, and walkability requirements of the Regional Plan.

Summary—efficient accommodation of identified land needs (good mix of uses) and orderly and economic provision of public facilities and services (easy connections to existing infrastructure).

CONCLUSION

In the course of the Planning Commission hearings other evidence was presented that led to a number of changes from the staff recommendation, such as including the Mahar property in MD-5. This was the point at which the vision of the City's future began asserting itself, supplementing and balancing the analysis-based recommendation with various economic, social, environmental, and energy considerations (see pp. 46–54 of the August 6, 2015 Council agenda packet).