



# City of Sandy

## Agenda

### City Council Meeting

Meeting Date: Monday, June 5, 2023

Meeting Time: 6:30 PM

Page

#### 1. MEETING FORMAT NOTICE

This meeting will be conducted in a hybrid in-person / online format. The Council will be present in-person in the Council Chambers and members of the public are welcome to attend in-person as well. Members of the public also have the choice to view and participate in the meeting online via Zoom.

##### To attend the meeting in-person

Come to Sandy City Hall (lower parking lot entrance).  
39250 Pioneer Blvd., Sandy, OR 97055

##### To attend the meeting online via Zoom

Please use this link: <https://us02web.zoom.us/j/87000123389>

Or by phone: (253) 215-8782; Meeting ID: 87000123389

Please also note the public comment signup process below.

#### 2. CITY COUNCIL WORK SESSION - 6:30 PM

##### 2.1. Parks and Recreation Financial Sustainability Plan

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[Parks and Recreation Financial Sustainability Plan and Master Fee Schedule Overview - Pdf](#)

#### 3. CITY COUNCIL REGULAR MEETING - 7:00 PM

#### 4. PLEDGE OF ALLEGIANCE

#### 5. ROLL CALL

#### 6. CHANGES TO THE AGENDA

#### 7. PUBLIC COMMENT

Please note: there will be opportunities to provide testimony during public hearings later in the agenda.

If you are attending the meeting in-person

Please submit your comment signup form to the City Recorder before the regular meeting begins at 7:00 p.m. Forms are available on the table next to the Council Chambers door.

If you are attending the meeting via Zoom

Please complete the [online comment signup webform](#) by 3:00 p.m. on the day of the meeting.

The Mayor will call on each person when it is their turn to speak for up to three minutes.

## **8. RESPONSE TO PREVIOUS PUBLIC COMMENTS**

## **9. CONSENT AGENDA**

- |      |  |           |
|------|--|-----------|
| 9.1. | <b><u>City Council Minutes</u></b>   | 32 - 39   |
|      | <a href="#">City Council - 15 May 2023 - Minutes - Pdf</a>                               |           |
| 9.2. | <b><u>City of Sandy Personnel Policy Update</u></b>                                      | 40 - 105  |
|      | Resolution 2023-18   |           |
|      | <a href="#">Personnel Policy Update - Pdf</a>  |           |
| 9.3. | <b><u>Adoption of Economic Development Strategic Plan 2023</u></b>                       | 106 - 150 |
|      | <a href="#">Economic Development Strategic Plan - Final adjustments - Pdf</a>            |           |
| 9.4. | <b><u>IGA with City of Lake Oswego (LOCOM) for After Hours Record Entry Services</u></b> | 151 - 158 |
|      | <a href="#">IGA City of Sandy/City of Lake Oswego (LOCOM) - Pdf</a>                      |           |

## **10. RESOLUTIONS**

- |       |   |           |
|-------|---|-----------|
| 10.1. | <b><u>PUBLIC HEARING: City of Sandy Supplemental Budget 2021-23</u></b> | 159 - 164 |
|       | Resolution 2023-25  |           |
|       | <a href="#">Supplemental Budget - City of Sandy BN 21-23 - Pdf</a>      |           |
| 10.2. | <b><u>PUBLIC HEARING: City of Sandy Budget Adoption 2023-25</u></b>     | 165 - 294 |
|       | Resolution 2023-21  |           |
|       | Resolution 2023-22  |           |
|       | <a href="#">BN 23-25 Budget Adoption - Pdf</a>                          |           |

## **11. NEW BUSINESS**

- |       |  |           |
|-------|--|-----------|
| 11.1. | <b><u>PUBLIC HEARING: EPA/DEQ Consent Decree Settlement Approval</u></b> | 295 - 401 |
|       | <a href="#">City of Sandy Press Release</a>                              |           |

11.2. **Gunderson / Hwy 211 Intersection Improvements Design Contract**

402 - 454

[Gunderson and Highway 211 Intersection Improvements - Pdf](#)

**12. REPORT FROM THE CITY MANAGER**

**13. COMMITTEE /COUNCIL REPORTS**

**14. STAFF UPDATES**

14.1. [Monthly Reports](#)

**15. ADJOURN**



## Staff Report

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**Meeting Date:** June 5, 2023

**From** Rochelle Anderholm-Parsch, Parks and Recreation Director  
Parks and Recreation Financial Sustainability Plan and Master Fee

**SUBJECT:** Schedule Overview

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### **DECISION TO BE MADE:**

Review and provide comments on:

- The Department's Financial Sustainability Plan
- Proposed changes to the Master Fee Schedule

### **PURPOSE / OBJECTIVE:**

To develop a policy that will provide an equitable framework to guide the management of the Parks and Recreation Department's expenses, and that will establish a method for the Department to determine where taxpayer money is spent and where we generate revenue.

### **BACKGROUND / CONTEXT:**

In total, the Parks and Recreation Department, along with a consultant, has been working on cost recovery analysis and policy for approximately 8 months.

### **Meeting and Engagement Timeline**

#### **City Council:**

On [December 14, 2022](#) Council members participated in a two-part training.

1. Education and training as to the 'why' of cost recovery
2. Joint session meeting with the Parks & Trails Advisory Board for a workshop on the beneficiary of services

#### **Parks and Recreation Department:**

Contracted with Amalia 110% Inc. to help in a department-wide cost recovery analysis and methodology creation. This work was completed in March 2023. This work required a multi step process that included:

1. Staff education and training as to the 'why' of cost recovery.
2. The development of service categories. This work required a department team to name and define all services provided. After a list of all department services was compiled, the team developed and defined service categories.
3. Cost of service analysis.

4. Beneficiary of service workshop.
5. Unveiling of the Cost Recovery Tool and the results of cost of service.
6. Adoption of the Parks and Recreation Financial Sustainability Plan.

**Parks and Trails Advisory Board:**

On [Sept. 14, 2022](#) Jamie Sabbach, with 110% presented to the Parks Board on the Department's cost recovery work. This presentation also included an educational session to supply information and context regrading cost recovery work.

On [April 12, 2023](#) PTAB voted to recommend the Financial Sustainability Plan and Master Fee Schedule, with incorporated edits, to the City Council.

The suggested edits were:

1. Move the Finance-centric Definitions to an Appendix B
2. Change the wording of our Resident and Non-resident rates to Fee and Resident Discounted Rate.

**KEY CONSIDERATIONS / ANALYSIS:**

As the Parks and Recreation Department continues to expand services and programs, it is important to have a policy that intentionally guides the Department's expenses and provides revenue generating goals.

Along with clear financial metrics, the Department's Financial Sustainability Plan will help guide the Department's prices, fees, partnerships, needs based assistance and capital investment opportunities. The Financial Sustainability Plan will provide Parks and Recreation with metrics to measure the success of the policy and an outline of what to do when the metrics are not being met.

**RECOMMENDATION:**

Staff is seeking Council input on both the Financial Sustainability Plan and the proposed changes to the Master Fee Schedule. Staff would like to bring these items forward for official adoption at a future council meeting.

**LIST OF ATTACHMENTS/EXHIBITS:**

- Attachment A: Draft policy for Sandy's Parks and Recreation Financial Sustainability Plan
- Attachment B: Presentation Slide Deck

## Attachment A



### FINANCIAL SUSTAINABILITY DEPARTMENT POLICY

#### Purpose

The City of Sandy Parks and Recreation Department's Financial Sustainability Policy intends to create organizational resilience by way of logical, intentional, and thoughtful guidelines for investment and spending decisions. The strategy encourages tax investment and revenue generation strategies and practices that are fair, equitable, and responsible. This policy is necessary to ensure the Department's financial stability in both the near and long term.

The Financial Sustainability Policy will guide investment and spending choices as the City responds to economic realities, growth competing priorities, demographic shifts and evolving community needs, and climate threats.

#### Policy Statement

In alignment with the City Council's 2021-2023 Goals [*Goal 5: To Maintain financial strength and sustainability; Action a: Diversify revenue sources, analyze new revenue streams, and look at cost recovery where possible*] the Department's Financial Sustainability Policy grounds cost recovery expectations and the spending of taxpayer dollars in a philosophical underpinning that affirms a commitment to equitable investment, financial discipline, and long-term fiscal health.

The bi-annual City of Sandy budget ultimately determines the amount of taxpayer support that can be made available for park and recreation services which results in understanding the degree to which subsidy investment can be made and to which services, and the degree to which user fees will be assessed and to which services.

#### Cost Recovery/Subsidy

Cost recovery refers to offsetting the costs (expenses) of delivering services by way of revenues generated from fees and charges, sponsorships, donations, grants, and other alternative revenue streams. Alternatively, subsidy represents a tax source. It is granted by a governmental entity; typically to remove some type of burden, and often considered to be in the overall interest of the public. It is also given to promote a social good or an economic policy.

For example, a cost recovery level of 75% simply means that for each dollar spent on a service, 75-cents are generated from a revenue source (i.e., fees) with the remaining 25-cents covered by subsidies (i.e., taxes).

## Department Funding/Revenue Sources

The City of Sandy Parks and Recreation Department is supported by a number of revenue sources which all contribute varying levels of funding to support the breadth of park and recreation services provided to the community. The degree to which each of these sources is relied upon can shift based upon the economy, market behaviors, and City-wide policy; however, property taxes are the primary source of funding for the Parks and Recreation Department.

### Tax Sources

-General Fund (property taxes paid by City of Sandy Residents)

### Alternative Sources

-Parks System Development Charges (SDCs)

-Fee in Lieu of Park Land Dedication

-Trustee Account

-Fees and Charges for Service

-Grants

## Service Categories

The development of categories which include *like* services are important when it comes to justifiable and equitable allocation of subsidy, cost recovery levels, and assignment of budget and general ledger lines to account for a category's fiscal performance (e.g., a service category such as *Beginner/Intermediate Programs* would include "like purpose" activities such as youth basketball, kinder dance classes, or beginner guitar regardless of age or special interest).

The benefits of this type of approach are two-fold. First, it is inefficient for the Department to determine cost recovery expectations by each individual service including facility, activity, or event. Secondly, categorizing by "type of service" or "likeness of service" discourages attempts to determine fees and charges (and therefore cost recovery decisions) based upon special interests, age-based services, or individual values.

The City of Sandy Parks and Recreation Department provides many services annually to the community. The following Service Categories represent the Department's service menu and include Service Category definitions as well as example services.

**-Advanced/Competitive Level Classes & Activities:** Classes and activities designed to advance or master a skill. In the case of team or league play, scoring is kept with winning as a primary goal. *Examples: Power Yoga, Parkour, Softball Leagues*

**-Beginner/Intermediate Level Classes & Activities:** Classes and activities designed to teach or engage at an introductory or novice level. In the case of team or league play, there is no-scoring with a focus on building foundational skills. *Examples: Kinderdance, Yoga & Stretch, Music and Movement, Skyhawks, 3/4th Grade Youth Basketball, Intermediate Parkour, Intermediate Guitar Lessons, 5/6th grade Youth Basketball*

**-Community Events:** Annual events designed to be inclusive of the entire community regardless of age, ability, family composition, or special interest. *Examples: Christmas Tree Lighting, Music & Movies in the Park, Holiday Lights at Meinig, Longest Day Parkway*

**-Drop-in Activities:** Self-directed activities which include staff oversight and supervision and do not require registration. *Examples: Community/Senior Center Lounge Drop-in, Games & Puzzles, Cooling Shelter, Open Gym, Silvertones*

**-Education & Enrichment Activities:** Classes and activities designed to educate and teach personal, social-emotional, and life skills. *Examples: Mental Health Classes, Medicare Classes, Babysitting Classes*

**-Human Services:** Resources provided for the prevention and remediation of life challenges and to support those who need assistance ensuring independence and community connection. *Examples: Meals on Wheels, Transportation Services, Case Management, Referrals, Energy Assistance, Congregate Meals*

**-Open Access:** Access to parks, trails, and facilities where activity is self-directed. No staff oversight is provided. *Examples: Parks, Trails, Dog Park, Playgrounds, Skate Park, Sports Courts*

**-Rentals:** Reservations which provide exclusive use of public spaces and places by a group or individuals. *Examples: Sports Field Rentals, Auditorium Rental, Art Room Rental, Dining Room Rental, Gazebo Rental, Plaza Rental, Community Garden Bed Rentals*

**-Social Equity Services:** Services that remove barriers and constraints to accessing park and recreation opportunities. *Examples: Inclusive Egg Hunt, Shower Cart, Todos Juntos*

**-Special Events:** Events designed and targeted towards a specific market or market niche'. *Examples: Noah's Quest, Corn Cross, Teen Egg Hunt, Senior Egg Hunt, Senior Outings/Trips, Mountain Festival Kids' Events*

*Note: Service Categories listed above are in alphabetical order.*

Common Good Services or cause and purpose driven services intend to impact social, economic, and environmental issues and needs; aligns with the fundamental purpose and mission of the Department. Typically, there are no like services provided by the non-profit/Non-Governmental Organizations (NGO) or private sectors.

Exclusive Benefit Services or specialized services intend to serve personal interests with competition from the non-profit/ Non-Governmental Organizations (NGO) and private sectors which offer like services being common practice.

Common Good (justification for greater subsidy investment)

- Community building

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- Provides accessibility to marginalized/under-represented populations
- Broad appeal to a wide audience
- Equity services

Exclusive Benefit (justification for greater cost recovery expectation)

- Individualized, special interest
- Requires higher competency/ability level to participate
- Private sector competition exists
- Specialized activities

### **Financial Sustainability Strategy**

The City of Sandy Parks and Recreation Department’s Financial Sustainability Strategy Continuum presents the degree to which financial resources will be spent and expenses will be recovered and managed. It is grounded in the differentiation of parks, recreation, and senior services on the basis of who benefits should pay. Economists have differentiated goods and services in the economy in this manner for decades and have designated three types of goods and services: community benefit, dual benefit, and individual benefit.

The Financial Sustainability Strategy Continuum acknowledges varying levels of service. This strategy shifts from one which suggests that all services should be provided at no or low cost for everyone to an equitable and just philosophy where subsidy allocation decisions are based upon “beneficiary of service”. In this conceptualization, each type of service has a set of specific characteristics that provide a rationale for who should pay (e.g., taxpayers, the individual, or both) and to what degree. Ultimately, this aligns subsidy allocation, cost recovery goals and expectations with beneficiary of service. Essentially, those who benefit from a service should pay for that service.

The four-year Financial Sustainability Strategy Continuum includes the Department’s Service Categories and short-term cost recovery/subsidy goals and expectations. The continuum is a graphic representation of the Department’s tax use and revenue enhancement strategy.

*The City of Sandy Parks and Recreation Department Financial Sustainability Strategy Continuum 2023-2026 are included in Appendix A of this policy.*

### **Updating Investment Expectations**

Service category cost recovery performance should be reviewed annually, and subsidy (tax dollar) investment goals should be analyzed and updated at least every four years or more frequently as necessary.

## Pricing – Fees & Charges

Several pricing methods are utilized by the Department in order to establish fees and charges. The principal method for establishing services fees will be cost recovery pricing which is defined as determining a fee based on established cost recovery goals.

Other pricing methods may be utilized by the Department, however, any strategy or method used will ultimately require that cost recovery goals or subsidy allocation expectations be met. Common alternative pricing methods include the following options which can be used based upon market behaviors, the competition, and other relevant considerations.

- *Market (demand-based) pricing* results in pricing based on demand for a service or what the target market is willing to pay for a service. The private and commercial sectors commonly utilize this strategy. One consideration for establishing a market rate fee is determined by identifying all providers of an identical service (i.e., private sector providers, other municipalities, etc.), and setting the highest fee. Another consideration is setting the fee at the highest level the market will bear.
- *Competitive pricing* establishes prices based on what similar service providers or close proximity competitors are charging for services. One consideration for establishing a competitive fee is determined by identifying all providers of an identical or similar service (i.e., private sector providers, other municipalities, etc.), and setting the mid-point or lowest fee.
- *Value-based pricing* is a pricing strategy in which the price of a product or a service is decided on the basis of perceived value or benefit it can provide to a customer. Value based pricing is more evident in places or markets where exclusive products are offered which offer more value than the generic or standard products.
- *Penetration pricing* has the aim of attracting customers by offering lower prices on services. While many may use this technique to draw attention away from the competition, penetration pricing often results in lost revenue and higher subsidy requirements. Over time, however, an increased awareness of the service may drive revenues and help organizations differentiate themselves from others. After sufficiently penetrating a market, organizations should consider raising prices to better reflect the state of their position within the market.
- *Premium pricing* establishes prices higher than that of the competition. Premium pricing is often most effective in the early days of a service's life cycle, and ideal for organizations that offer unique services. Because customers need to perceive products and services as being worth a higher price tag, an organization must work hard to create a value perception.
- *Bundle pricing* allows for the sale of multiple services for a lower rate than customers would pay if they purchased each service individually. Bundling can be an effective way of selling services that are poor performers and can also increase the value perception in the eyes of customers - essentially giving them something for a reduced rate.

- *Differential/Dynamic pricing* follows the "law of demand" by supporting a key pricing principle: some customers are willing to pay more than others. Differential pricing is the strategy of selling the *same* service to *different* customers at *different* prices (ex. Residential Discount vs Fee). Differential pricing enables organizations to "profit" from their customers' unique valuations (ex. Prime time or surge pricing).

In the event a Service Category's subsidy/cost recovery goal is higher than current cost recovery performance and fee increases are required, prices may need to be raised incrementally in accord with market acceptance to optimize revenue generation. However, if the market does not respond favorably to the increase, the service may require divestment if the subsidy investment required cannot be justified based upon beneficiary of service.

In the event a tax dollar investment/cost recovery goal is less than the current level of recovery the established fee will remain the same to ensure that there is no loss of revenue or negative impact on the Department's financial condition.

### **Partnerships**

Partnerships are advantageous collaborations that position both the Department as well as participating partner organization(s) to efficiently utilize resources leading to cost effective and efficient service delivery, bridging of markets, reductions in duplication of services and fragmentation of resources, and cooperative capital development and/or improvements.

A condition that must be met in order for the Department to enter into a partnership agreement includes that of reciprocal benefit. To prevent the Department from simply becoming a granting body to any organization, the Department and its partner identify the value of the mutual contributions brought forth to the agreement and arrangement. There will be equal value and benefit to each organization resulting from any partnership ensuring that the Department is receiving fair and just value on behalf of taxpayers in return for any resource investment and commitment.

### **Reinvestment**

The Financial Sustainability Policy guides re-investment into the park and recreation system such as in those services which require extensive and essential investment. Methods for reinvestment may include a retained earnings fund, an enterprise fund, or similar that will allow for the re-distribution of excess revenues generated from Department services such as Specialized Business Services that are individualized, highly specialized and/or exclusive, and expected to generate a minimum of 100% cost recovery to a retained earnings, enterprise, or similar fund. This fund may be used to support service interests such as social equity and capital investments in park and recreation infrastructure that require short, preventative, and long-term maintenance alleviating pressure and reducing reliance on the City's General Fund.

## Needs Based Assistance

The Department ensures that services are accessible to residents who may be considered economically-disadvantaged, underserved, under-represented, or marginalized, and who may require assistance and support in accessing parks and recreation services. This will require that funds are appropriated and fairly and equitably distributed throughout sub-communities in need. Applications will be made available allowing for the neediest individuals and families in order to have access to reduced rates that can both satisfy need for assistance as well as provide equitable subsidies across the system.

Appropriations will be determined as follows.

1. Projected financial aid needs.
2. Award thresholds.
3. Anticipated total population needing to be served.

Awards will be issued to City of Sandy residents, defined as those who live within the City limits. Financial assistance will be based upon a “pay what you can” model and the process will be evaluated annually. Additional funds will be sought by fundraising and using a “round up” or “pay it forward” option and will be made available within the registration/point of sale system.

The Department intends to reduce barriers to entry by not requiring financial records or disclosures, rather, relying on an “honor system” for the application process requesting information from applicants specific to their needs and ability to pay only. Applications will be kept on file for one year from application.

## Capital Investment

The City of Sandy follows a biennium budget process and the budget philosophy is focused on expenditure control. If the Parks and Recreation Department under-expends and brings in more revenue than projected/allocated, these funds will be held over as a beginning balance for the subsequent budget. Beginning balance funds are transferred from year to year and can be used for Capital Investment Projects.

## Success Metrics

Success metrics will be used as a means to evaluate whether or not each service is in compliance with established cost recovery goals (as indicated on the Financial Sustainability Strategy Continuum) as well as other efficiencies and intended outcomes. In the event success metrics are not being met, items 1-6 below the Success Metrics list outline actions to address gaps between current performance and success metrics.

**Success Metric 1:** Financial Viability: a service must meet its minimum tax dollar investment/ cost recovery goal as noted on the Financial Sustainability Strategy Continuum.

**Success Metric 2:** Operational Efficiency: services should meet 75% or more of capacity (maximum) or realize a minimum increase of 10% usage during each service cycle to ensure efficiency of resource investment (*excl: events where capacity is difficult to establish*).

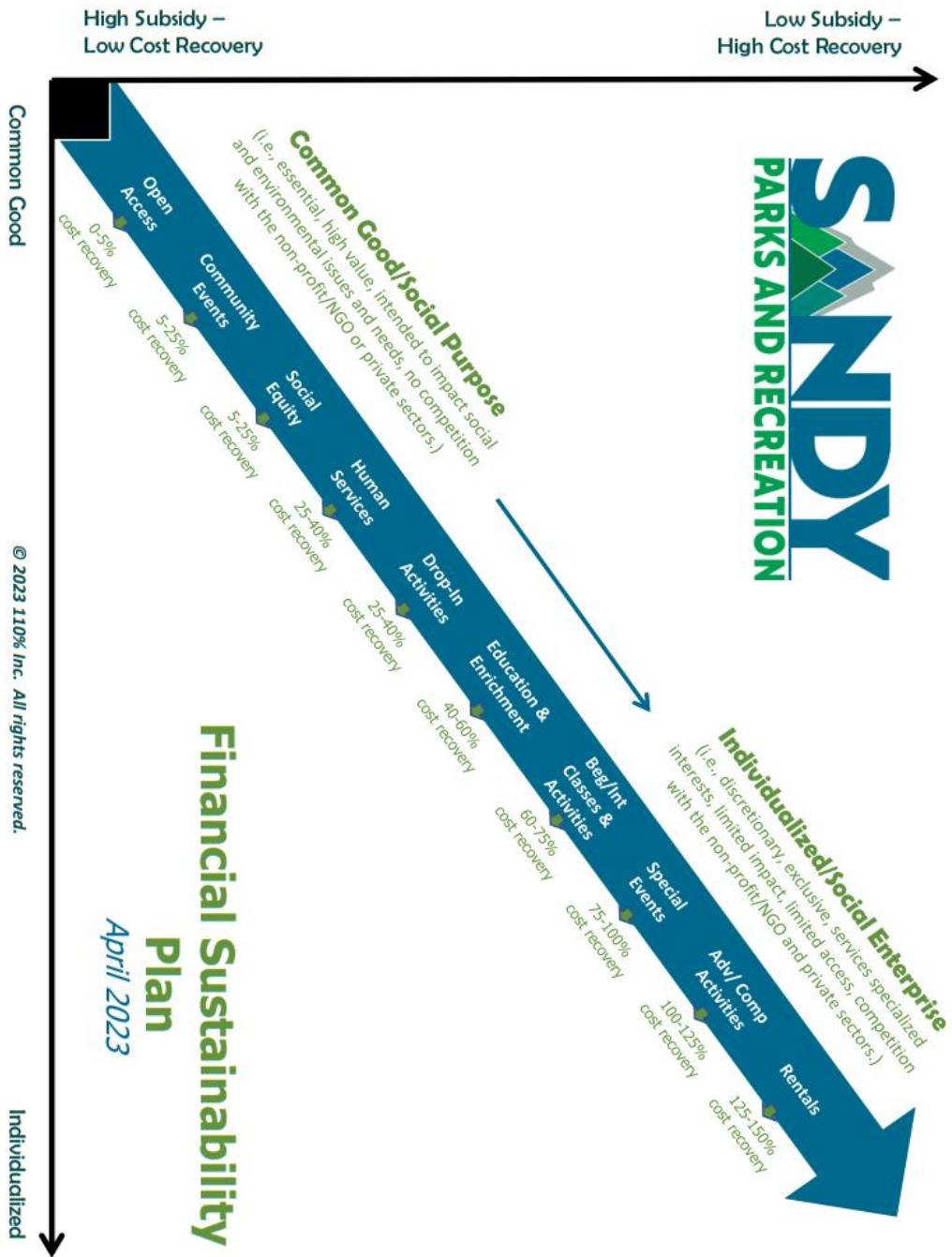
**Success Metric 3:** Participant/Customer Satisfaction: overall participant (customer) satisfaction must meet a minimum of 85% satisfaction or higher (*per user surveys and evaluations*).

**Success Metric 4:** Participant/Customer Impact: alignment with service goals – impact on social connections, increases in activity levels, impacts on quality of life, school performance, etc. (*per user surveys and evaluations*).

Addressing gaps between existing cost recovery performance and target (goals)

1. Analyze success metrics for services not meeting their cost recovery goal.
2. Analyze direct and indirect costs of providing service.
  - a. Measure ratio of direct and indirect cost.
  - b. Identify cost reduction opportunities and implement.
3. Suggest market increase commensurate with cost recovery goal.
  - a. Conduct market analysis of service.
  - b. Identify opportunities for capturing larger markets.
4. Identify potential sponsorship, donation, or pay-it-forward opportunities.
5. Identify potential partnership opportunities to continue to provide a service, however, in collaboration with another provider, reducing impacts on and dilution of Department resources, avoiding unnecessary duplication of service, and responsibly utilizing finite taxpayer resources.
6. If services do not satisfy success metrics, consider divestment of service at the end of a four-year strategy term or sooner.

# FINANCIAL SUSTAINABILITY PLAN – Appendix A



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## FINANCIAL SUSTAINABILITY PLAN – Appendix B

### Finance-centric Definitions

**Ability to Pay:** Derived from the economics principle suggesting that those who have more financial resources (wealth) or earn higher incomes should pay more taxes. Relative to municipal park and recreation services, this can be translated to the ability to pay for direct service based on an individual's financial circumstances.

**Alternative Funding:** Other ways to improve cost recovery in addition to fees and charges. May include grants, sponsorships, donations, volunteer programs, etc.

**Benefit:** The degree to which programs and services positively impact the public (individual and community), or in other words, the impact of services.

**Budget:** An estimation of revenue and expenses over a specified future period of time; usually compiled and re-evaluated on a periodic basis.

**Capacity:** The number of available spaces or the occupancy rate of a service. Also referred to as service maximum.

**Collaborate:** The process of two or more people or organizations working together to complete a task or achieve a goal.

**Contact Hours:** The total number of hours an individual participates in an activity, class, course, or event.

**Cost Recovery:** The degree to which the cost (direct and indirect) of facilities, services and programs is supported or paid for by user fees and/or other designated funding mechanism such as grants, partnerships, etc. versus the use of tax subsidies.

**Depreciation:** The periodic cost assigned for the reduction in usefulness and value of a long-term tangible asset.

**Direct Cost:** Cost incurred that can be traced directly to provision of a service. This cost would not be incurred if the service ceased. This includes fixed and variable costs.

**Donation:** A gift, grant, or contribution with no expected exchange or reciprocity. Typically done as "good will".

**Enterprise/Quasi-enterprise:** A governmental accounting method established to record transactions like those utilized in the private sector, allowing for tracking of services through a separate fund that records all transactions. All revenues and expenses, as well as assets and current liabilities are included. This type of fund is generally required to break even or generate excess revenues over expenditures. Any revenues earned in excess of expenses are carried over, used for capital improvements or transferred to the General Fund. Collected gross revenues are not deposited in the General Fund, but rather are intended to be used to expand or improve services.

**Exclusive Use:** Scheduled, planned, or programmed use of a facility or space that is limited or restricted to a reserved or rented party. They have the right to the space for the specified period while others are excluded from using the facility or space.

**Fee/Price:** The amount charged to the customer for an activity or service.

**Financial Management:** The planning, directing, monitoring, organizing, and controlling of monetary resources.

**Full Cost:** The total cost associated with an activity or service.

**Grant:** A bounty, contribution, gift, or subsidy bestowed by a government or other organization (grantor) for specified purposes to an eligible recipient (grantee) and conditional upon certain qualifications as to use, maintenance of standards, or proportional contribution by the grantee.

**Indirect Cost:** Cost incurred with or without provision of a service. These costs are not traceable to a specific service and can benefit the system as a whole (do not directly benefit a single service).

**Needs Quantification:** Numerically expressing need through the application of a scoring system that quantifies whether an individual or family qualifies for financial assistance (e.g., applying a scoring system to HUD Poverty Guidelines, location of residence, school free lunch program qualification and other relevant variables).

**Non-resident:** A person or household whose primary residence is outside of the organization's (jurisdiction's) service area and does not pay property taxes to the organization (jurisdiction).

**Participant/Guest/User/Visitor:** The individual who participates in an activity, class, course, event, etc.

**Participants/Guests/Users/Visitors:** The total number of individuals who participate in an activity, class, course, event, etc.

**Participations:** The total number of participants multiplied times the total number of hours an activity, class, course, event, etc. meets.

**Partnership:** An advantageous collaboration that positions two or more participating organizations with common missions to efficiently utilize resources leading shared profits/losses and reciprocal benefit.

**Price/Fee:** The amount charged to the customer for an activity or service.

**Profit/Excess Revenues:** The additional revenue generated by a service when revenues exceed costs or expenditures.

**Program:** A common label in the field of parks and recreation for recreation services such as activities, courses, classes, and events.

**Resident:** A person or household whose primary residence is within an organization's (jurisdiction's) service area and who does pay property taxes to the organization (jurisdiction).

**Scholarship:** A waiver provided as a way to create access to services for those in need of financial assistance.



**Sponsorship:** The act of supporting a person, organization, or activity by giving money in either in-kind or cash form. Typically done with an expectation for some type of “exchange”.

**Subsidy:** Funding through taxes or other mechanisms that are used to financially support programs or services provided to users and participants. Subsidy dollars provide for the program or service costs (direct and/or indirect) that are not covered by user or participant fees, or other forms of alternative funding. This is the community’s financial investment (i.e., taxes).

**Success Metrics:** Performance measures are quantifiable evaluations of the organization's performance on a pre-determined set of criteria measured over time. The agreement upon standard performance measures allows the organization to judge its progress over time (internal benchmarking) and identify areas of strength, weakness and potential for improvement.

**Total Cost of Service:** The cost to provide a service including both direct and indirect costs.

**Willingness to Pay (WTP):** The maximum amount an individual is willing to give to procure a product or service. The price of the transaction will thus be at a point somewhere between an individual’s willingness to pay and the seller's willingness to accept. Macro environmental factors such as the overall state of the economy can influence willingness to pay.



Attachment B

# Parks and Recreation Cost Recovery Update

John Wallace, Recreation & Senior Services Manager  
Rochelle Anderholm-Parsch, P&R Director

# Agenda

- Decision Timeline
- Draft Policy of our Financial Sustainability Plan
- Master Fees
- Recommendation
- Comments & Questions



# Decision Timeline

- **Sept. 14th 2022 | PTAB**

Consultant provided and educational session and answered questions about the Parks and Recreation Department’s effort regarding cost recovery

- **Dec. 14th 2022 | Council**

During the joint work session the consultant provided an educational session the Council and PTAB.

Then the council and PTAB ranked the Department's service categories from 1 to 10 based on the idea that a service starting with (1) representing a “common good” (receiving a higher level of dedicated taxpayers funds), or a (10) representing a more “individualized benefit”

- **April 12th 2023 | PTAB**

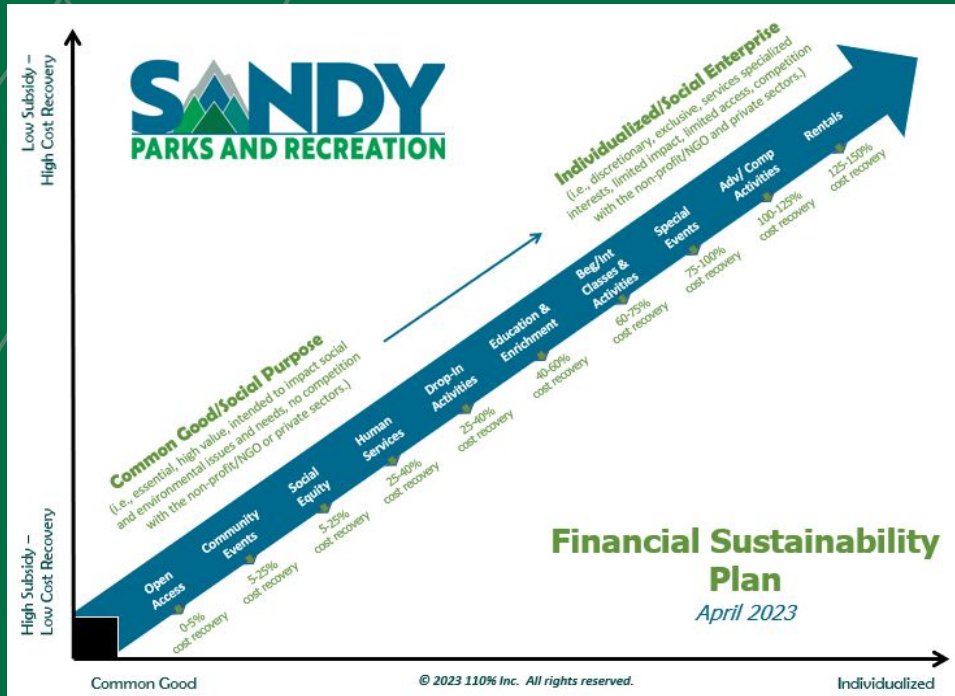
Reviewed, provided comments, and recommend, to the Council, the adoption of the Policy for the Parks and Recreation Financial Sustainability Plan.

- **June 5th 2023 | Council**

Present to Council for future adoption



# Cost Recovery Goals



# Draft Policy of Sandy's Financial Sustainability Plan

- Much of the Policy is review
  - Purpose
  - Subsidy vs Cost Recovery
  - Service Categories
- Highlight Some New Information
  - Investment Expectations
  - Needs Based Assistance
  - Success Metrics



## FINANCIAL SUSTAINABILITY DEPARTMENT POLICY

### Purpose

The City of Sandy Parks and Recreation Department's Financial Sustainability Policy intends to create organizational resilience by way of logical, intentional, and thoughtful guidelines for investment and spending decisions. The strategy encourages tax investment and revenue generation strategies and practices that are fair, equitable, and responsible. This policy is necessary to ensure the Department's financial stability in both the near and long term.

The Financial Sustainability Policy will guide investment and spending choices as the City responds to economic realities, growth competing priorities, demographic shifts and evolving community needs, and climate threats.

### Policy Statement

In alignment with the City Council's 2021-2023 Goals [Goal 5: To Maintain financial strength and sustainability; Action a: Diversify revenue sources, analyze new revenue streams, and look at cost recovery where possible] the Department's Financial Sustainability Policy grounds cost recovery expectations and the spending of taxpayer dollars in a philosophical underpinning that affirms a commitment to equitable investment, financial discipline, and long-term fiscal health.

The bi-annual City of Sandy budget ultimately determines the amount of taxpayer support that can be made available for park and recreation services which results in understanding the degree to which subsidy investment can be made and to which services, and the degree to which user fees will be assessed and to which services.

### Cost Recovery/Subsidy

Cost recovery refers to offsetting the costs (expenses) of delivering services by way of revenues generated from fees and charges, sponsorships, donations, grants, and other alternative revenue streams. Alternatively, subsidy represent a tax source. It is granted by a governmental entity; typically to remove some type of burden, and often considered to be in the overall interest of the public. It is also given to promote a social good or an economic policy.

# Investment Expectations

Service category cost recovery performance should be reviewed annually, and subsidy (tax dollar) investment goals should be analyzed and updated at least every four years or more frequently as necessary.



# Needs Based Assistance

Ensures that services are accessible to residents who may require assistance and support in accessing parks and recreation services

- Our Department goal is to provide financial assistance to those in need
- Offset those funds with creative fundraising





# Success Metrics

Means to evaluate whether or not each service is in compliance with established cost recovery goals.

**Success Metric 1:** Financial Viability: a service must meet its minimum tax dollar investment/ cost recovery goal as noted on the Financial Sustainability Strategy Continuum.

**Success Metric 2:** Operational Efficiency: services should meet 75% or more of capacity (maximum) or realize a minimum increase of 10% usage during each service cycle to ensure efficiency of resource investment (*excl: events where capacity is difficult to establish*).

**Success Metric 3:** Participant/Customer Satisfaction: overall participant (customer) satisfaction must meet a minimum of 85% satisfaction or higher (*per user surveys and evaluations*).

**Success Metric 4:** Participant/Customer Impact: alignment with service goals – impact on social connections, increases in activity levels, impacts on quality of life, school performance, etc. (*per user surveys and evaluations*).



# Master Fee Schedule

**Why:** Provides a clear set of guidelines for departmental fees.

- Transparent Communication
- Reduces risk of ambiguous pricing
- Ensures competitive pricing and financial sustainability



**Changes to Highlight:**

- We aim to formalize this process and provide a framework for regular review.
- Fee Updates
  - Resident Discount (define residency)
  - 50% increase not to exceed \$20
  - Custodial Fee-One time fee of \$20
  - Added green space rental fee to other parks
  - Shelter rentals to Bornstedt, Cascadia, small shelters at Meinig



# Shelters

		Shelters					
		Location	Amenity	Current Fee	Resident Discount	Fee	Hours
Current Amenity	Meing Park	Gazebo & Ampetheater	*\$200 Resident *\$300 Non-Resident	\$200	\$300	Park Hours	
	Cenntennial Plaza	Cenntennial Plaza	*\$200 Resident *\$300 Non-Resident	\$200	\$300	Park Hours	
Proposed Amenity	Meing Park	Small Shelters	n/a	\$10 per hour	\$15 per hour	11:00am-2:00pm	
	Bornstedt Park	Large Shelter	n/a	\$100	\$130	11:00am-2:00pm	
	Cascadia Park	Shelter	n/a	\$50	\$70	11:00am-2:00pm	
	Bluff Park	Shelter	n/a	\$50	\$70	11:00am-2:00pm	



# Community Garden

Community Garden						
	Location	Amenity	Current Fee	Resident Discount	Fee	Hours
Current Amenity	Bornstedt Park	Garden Bed	*1st Bed \$20 *Subsequent Bed \$25	*1st Bed \$20 *Subsequent Bed \$25	*1st Bed \$25 *Subsequent Bed \$30	Park Hours



# Community/Senior Center

Community/Senior Center						
	Location	Amenity	Current Fee	Resident Discount	Fee	Hours
Current Amenities	Community/Senior Center	Auditorium	\$35 per hour	\$40 per hour	\$60 per hour	9:00am-10:00pm
	Community/Senior Center	Dining Room	\$35 per hour	\$40 per hour	\$60 per hour	9:00am-10:00pm
	Community/Senior Center	Art Room	\$10 per hour	\$15 per hour	\$30 per hour	9:00am-10:00pm
	Community/Senior Center	Lounge	\$10 per hour	\$15 per hour	\$30 per hour	9:00am-10:00pm
Proposed Amenities	Community/Senior Center	Building	n/a	\$125 per hour	\$145 per hour	9:00am-10:00pm
	Community/Senior Center	Kitchen	n/a	\$15 per hour	\$30 per hour	9:00am-10:00pm

\*We are adding an additional, one time, custodial fee of \$20 to all rentals at the Community/Senior Center.



Notes: Cost Recovery Goal for Rentals is 125%-150%

Building Monitor: \$13.99

Facility Use: \$17.21

Custodial Fee: \$20 one time fee

2018/2019 our Cost Recovery was 5%



# Green Spaces & Fields

These prices are for profit making groups/organizations (ex. Eastside Timbers, Yoga Instruction, OTSD...) Fields and Green Spaces are not available for personal rentals (ex. Birthday Parties, Family Reunions...)



Fields & Green Spaces						
	Location	Amenity	Current Fee	Resident Discount	Fee	Hours
Current Amenity	Community Campus	Upper Field	\$20 per hour	\$20 per hour	\$30 per hour	Park Hours
	Community Campus	Lower Field	\$20 per hour	\$20 per hour	\$30 per hour	Park Hours
Proposed Amenity	Sandy Parks	Green Space	n/a	\$20 per hour	\$30 per hour	Park Hours

\*The renting of Fields and Green Space are reserved for Profit Making Groups and Organizations (i.e. East Side Timbers, OTSD, Yoga...)

## Next Steps

### **RECOMMENDATION:**

1. Staff recommends that council provide input, or supports the policy as written, for both the Financial Sustainability Plan and The Master Fee Schedule. Staff would like to bring the policy forward for adoption at a future council meeting.

**END OF PRESENTATION**





**MINUTES**  
**City Council Meeting**  
**Monday, May 15, 2023 6:00 PM**

**COUNCIL PRESENT:** Chris Mayton, Councilor; Laurie Smallwood, Council President; Richard Sheldon, Councilor; Kathleen Walker, Councilor; Carl Exner, Councilor; Don Hokanson, Councilor; and Stan Pulliam, Mayor

**COUNCIL ABSENT:** (none)

**STAFF PRESENT:** Jordan Wheeler, City Manager; Jeff Aprati, City Recorder; Tyler Deems, Deputy City Manager; Jenny Coker, Public Works Director; Ernie Roberts, Police Chief; David Snider, Economic Development Manager; Kelly O'Neill Jr., Development Services Director; and Rochelle Anderholm-Parsch, Parks and Recreation Director

**MEDIA PRESENT:** Sandy Post

**1. CITY COUNCIL WORK SESSION - 6:00 PM**

**1.1. Economic Development Strategic Plan Review**

Staff Report - 0700

Elliot Weiss of Community Attributes, Inc. provided a presentation to the Council on the Economic Development Strategic Plan, developed over the past year and recommended to the Council by the Economic Development Advisory Board. Mr. Weiss' presentation slides were included in the agenda packet.

Council discussion ensued on the following topics:

- Discussion on the degree to which the plan will be implemented by the City or by other community partners
- Discussion on whether the City should further invest in sectors established in the area, or pursue other sectors desired by community members; discussion on the importance of job density, good wages, available land and resources, and opportunities to leverage and multiply the focused efforts of other neighboring communities
- Discussion of Sandy's assets related to tourism and recreation, especially related to seasonal versatility and range of unique and convenient amenities
- Clarification on the meaning of 'systems' in Goal 1
- Job training efforts will rely on collaboration with community partners.



- Suggestion to provide more emphasis on leveraging Sandy's transit system (Sandy Area Metro).
- Clarification on the suggestion to build on area assets in metals manufacturing
- Suggestion to highlight possibilities for leveraging metals fabrication in conjunction with the emerging mass timber industry
- Discussion on opportunities to update regulations on food carts/trucks to drive innovation and investment
- Discussion on the relative level of ease of conducting and/or starting a business in Sandy; discussion of grant programs; discussion of the need to mitigate blight; discussion of the proper ratio of incentives to enforcement
- Emphasis on the need to leverage Winterfest as an economic driver
- Suggestion to pursue possibilities for industry use of the City's treated effluent
- Emphasis on the need to ensure that economic development and urban renewal funds are invested effectively; assessments of the relative success and returns on investment realized from the City's economic development activities and programs generally

**2. CITY COUNCIL REGULAR MEETING - 7:00 PM**

**3. Pledge of Allegiance**

**4. Roll Call**

**5. Changes to the Agenda**  
(none)

**6. Public Comment**  
(none)

**7. Response to Previous Public Comments**  
(none)

**8. Consent Agenda**

8.1. **City Council Minutes**  
April 17, 2023

8.2. **Economic Development Advisory Board Appointments**

Staff Report - 0705

8.3. **Update Bank Signatories**

Resolution 2023-13

Staff Report - 0697

8.4. **Authorization of CWSRF Loan Agreement**

Resolution 2023-14

Staff Report - 0699

8.5. **Authorization of New Bank Account**

Resolution 2023-15

Staff Report - 0698

8.6. **Stranded Workers IGA**

Resolution 2023-16

Staff Report - 0702

8.7. **Stormwater Interfund Loan**

Resolution 2023-17

Staff Report - 0703

**Moved by Laurie Smallwood, seconded by Richard Sheldon**

***Adopt the Consent Agenda***

**CARRIED. 7-0**

Ayes: Chris Mayton, Laurie Smallwood, Richard Sheldon,  
Kathleen Walker, Carl Exner, Don Hokanson, and Stan  
Pulliam

9. **Old Business**

9.1. **Modification of Parks System Development Charge (SDC) and Fee-in-Lieu (FIL) Rate Implementation**

Resolution 2023-11

Resolution 2023-12

Staff Report - 0695

The **Development Services Director** summarized the staff report, which was included in the agenda packet.

Discussion begin with clarification on the effects of Resolution 2023-11, after which a motion to approve 2023-11 was voted on and approved (referenced below).

Discussion continued on Resolution 2023-12, pertaining to the following issues:

- Clarification of the number of units currently proceeding through the approval process that would be affected by lowering the fee-in-lieu rate
- Discussion of currently approved lots that could potentially convert to duplexes pursuant to HB 2001, and the fact that such an action would require only a building permit and not a new land use application
- Discussion of the application date of Cascade Creek Apartments, and of whether it is appropriate for this property to benefit from the reduced fee-in-lieu period
- Clarification on the effective date of the resolution, and the fact that fees-in-lieu for most of the properties in question have not yet been paid. Establishing a reduced fee-in-lieu period as of the effective date of this resolution would capture nearly all the properties in question, save two duplex units that would require reimbursement.
- Possibilities for revisiting fee-in-lieu rates again in the future
- Discussion related to the current moratorium

**Moved by Laurie Smallwood, seconded by Chris Mayton**

***Adopt Resolution 2023-11***

**CARRIED. 7-0**

Ayes: Chris Mayton, Laurie Smallwood, Richard Sheldon,  
Kathleen Walker, Carl Exner, Don Hokanson, and Stan  
Pulliam

**Moved by Laurie Smallwood, seconded by Chris Mayton**

***Adopt Resolution 2023-12***

**CARRIED. 4-3**

Ayes: Chris Mayton, Laurie Smallwood, Carl Exner, and Stan  
Pulliam

Nays: Richard Sheldon, Kathleen Walker, and Don Hokanson

**10. New Business**

**10.1. City Manager Recruitment Firm Contract Approval**

Staff Report - 0706

The **Human Resources Director** summarized the staff report, which was included in the agenda packet, and the recommendation to contract with Jensen Strategies, LLC. She outlined the proposal solicitation and evaluation process with the City Manager Recruitment Subcommittee. She confirmed that the recruitment process would be national in scope, that the city manager and police chief recruitments would be conducted separately. **Councilor Hokanson** shared that he was impressed with the firm's process.

**Moved by Kathleen Walker, seconded by Don Hokanson**

***Authorize the City Manager to execute a contract with Jensen Strategies, LLC for city manager recruitment services, as provided in the agenda packet***

**CARRIED. 7-0**

Ayes: Chris Mayton, Laurie Smallwood, Richard Sheldon,  
Kathleen Walker, Carl Exner, Don Hokanson, and Stan  
Pulliam

**10.2. Interim City Manager Contract Approval**

Staff Report - 0709

The **City Attorney** summarized the staff report, which was included in the agenda packet. Clarification was provided to the Council on the calculation of the compensation package included in the contract.

**Moved by Richard Sheldon, seconded by Carl Exner**

***Approve the temporary employment contract with Tyler Deems for executive city management services as Interim City Manager, as provided in the agenda packet***

**CARRIED. 7-0**

Ayes: Chris Mayton, Laurie Smallwood, Richard Sheldon,  
Kathleen Walker, Carl Exner, Don Hokanson, and Stan  
Pulliam

**11. Report from the City Manager**

- Comprehensive Plan update 'Block 2' draft text will be sent to the Council soon
- Estacada recently opened a new park
- New police speed trailer will be deployed soon
- Discussion regarding enforcement of the City's new camping regulations
  - Complaints received regarding camping near Industrial Way and Champion Way
  - Preparations underway for enforcement of new RV parking regulations
  - Concerns regarding camping in front of the Library
  - Concerns regarding creaking into mailboxes
  - Needs for clear process and procedures for enforcement of RV parking regulations, including advising of requirements, punctual follow up, towing if necessary if the problem remains after approximately one week
  - Needs for a clear process and action plan for enforcement of camping regulations, including roles and responsibilities, patrol procedures, and timeline expectations
  - Emphasis on the need to submit complaints through proper channels, not only social media
  - Emphasis on the need for empathy for homeless individuals, as well as for affected property owners
  - Suggestions for use of trespass procedures if necessary
  - Appreciation for the difficulty and complexity of the challenges involved
- Thanks and gratitude to the Council and staff for their work and support during his tenure

**12. Committee /Council Reports**

Councilor Hokanson

- Thanks and appreciation for Jordan Wheeler's service as city manager
- Concerns regarding the dumpster at Tractor Supply
- Anticipation for the new speed trailer; suggestion for speed radar in the downtown core
- Suggestion that the new permanent city manager should select the new police chief; suggestion that an interim chief may be necessary

Councilor Exner

- Thanks and appreciation for Jordan Wheeler's service as city manager
- Appreciation for the new sidewalk near the police station

Councilor Walker

- Thanks and appreciation for Jordan Wheeler's service as city manager

- Concern regarding disregard for the stop sign at the intersection of Melissa and Rachael Dr
- Anticipation for the new library outreach vehicle
- Suggestions regarding deployment of the new speed trailer

Councilor Sheldon

- Thanks and appreciation for Jordan Wheeler's service as city manager

Council President Smallwood

- Thanks and appreciation for Jordan Wheeler's service as city manager
- Appreciation of recent police officer interviews
- Needs for pavement maintenance on Pleasant St

Councilor Mayton

- Thanks and appreciation for Jordan Wheeler's service as city manager
- Appreciation for the Council's consideration of the changes to fees-in-lieu

Mayor Pulliam

- Appreciation for the Council's good intentions despite the split vote on the fee-in-lieu issue; emphasis on the importance of striving for compromise and consensus
- Reminder on the upcoming C4 retreat
- Reminder on the upcoming CCA dinner in West Linn
- Emphasis on the importance of the upcoming police chief recruitment
- Thanks and appreciation for Jordan Wheeler's accomplishments as city manager, particularly the master planning, talented staff.

Following the Mayor's remarks, Mr. Wheeler was presented with two thank you gifts from the City.

**13. Staff updates**

13.1. [Monthly Reports](#)

**14. Adjourn**

**15. CITY COUNCIL EXECUTIVE SESSION**

The City Council met in executive session pursuant to ORS 192.660(2)(f) and (2)(h)

City Council  
May 15, 2023

Mayor, Stan Pulliam

---

City Recorder, Jeff Aprati

Draft



## Staff Report

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**Meeting Date:** June 5, 2023  
**From** Angie Welty, Human Resources Director  
**SUBJECT:** Personnel Policy Update

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### **DECISION TO BE MADE:**

Whether to approve the updated 2023 Employee Personnel Policies

### **BACKGROUND / CONTEXT:**

The City's Personnel Policies was last updated on February 1st, 2022. Staff intends to update these policies as needed to ensure compliance with all applicable state and federal laws. The City's insurance carrier, Citycounty Insurance Services (CIS), provides members with draft policies that include all required policies, as well as best practice policies to minimize exposure for employment claims. Staff reviewed the sample policies and implemented the required updated and new policies.

Staff is recommending the proposed policy changes to Council based on modifications in state and federal law, mandates by our insurance company as well as updating best practices, as they relate to our employment policies. A listing and brief explanation of material changes and additions to the City of Sandy's Personnel Policies is provided below.

### **KEY CONSIDERATIONS / ANALYSIS:**

#### **Updates to existing policies required by Federal and state law:**

##### FMLA/OFLA Policies

As an organization that employs more than 25 employees, we are required to follow both of these acts for any employee who meets the requirements. These policies have been updated to reflect new Public Health Emergency language.

##### Workers' Compensation

As an employer in Oregon, we are responsible to provide workers' compensation coverage to employees in the event of an on-the-job injury. This policy was updated to include a more detailed description of which health care providers are acceptable to provide documentation regarding an employees condition.

##### Workplace Safety



As an employer in Oregon, we are required to have a safety committee or hold safety meetings. Staff has updated the language to reflect that employees may be asked to participate in the safety committee as part of their employment with the City of Sandy.

#### Equal Employment Opportunities Policies

This section has been updated to include "race definition", "protective hairstyles" and further define "gender identity", along with updating no-harassment language to be inclusive of volunteers and interns.

#### **Updates related to internal policy changes:**

##### Employee Classification

Medial Benefit eligibility has been changed from 20 hours per week to 30 hours per week to match requirements identified in the Affordable Care Act (ACA). No employees are being impacted by this change. This change does not change sick or vacation leave eligibility.

##### Compensatory Time

The maximum amount of compensatory time allowed has been decreased from 240 hours to 80 hours. As the Council may recall, this was a change that was made in the recent collective bargaining agreement with the Sandy Police Association. The intent with this change is to streamline our payroll processes and be consistent across the board for all employees who are eligible to earn compensatory time. In addition, this change will bring the City in line with comparable cities. Any employee who has reached their maximum accrual would be required to take their overtime pay in cash, in-lieu of earning compensatory time. Based on the most recent payroll, this will affect nine employees. Human Resources will work with the impacted employees and will be provided various options to ensure compliance no later than June 30, 2024.

##### Fringe Benefits and Additional Compensation

The maximum allowance for a gym membership will increase from \$45 per month to \$50 per month. This will now be consistent with the allowance available to Sandy Police Association members. In addition, the modification to this program will now include on-line programs; for example, Peloton, Apple Fitness, etc.

##### Employee-Incurred Expenses & Reimbursement

The policy has been updated to reflect that mileage reimbursement is only available travel outside of city limits.

#### **Additions recommended by our insurance company as best practices (and consistent with many of the other cities who use CIS for Insurance services):**

##### Driving While on Business

This policy has been updated to include language specific to an employee who receives a ticket or citation while driving a City of Sandy owned vehicle or while on City of Sandy

business. They will be responsible for paying the fine or citation (if any) and may face discipline up to and including termination.

City staff will be notified of the changes after Council adopts these revised personnel policies. In addition, employees will be provided a copy of the entire document the second week of June and be required to sign/acknowledge the receipt of the updated policies to the effective date of July 1st, 2023.

**RECOMMENDATION:**

Staff recommends approving the comprehensive update to the personnel policy manual effective July 1, 2023.

**BUDGETARY IMPACT:**

None.

**SUGGESTED MOTION LANGUAGE:**

"I move to approve Resolution 2023-18, a resolution updating the Personnel Policies for the City of Sandy."

**LIST OF ATTACHMENTS/EXHIBITS:**

- Resolution 2023-18
- Personnel Policies - July 2023



NO. 2023-18

**A RESOLUTION ADOPTING AMENDMENTS TO THE PERSONNEL POLICIES FOR CITY OF SANDY EMPLOYEES**

**Whereas**, the City of Sandy Personnel Policies was last amended in February 2022; and

**Whereas**, the Personnel Policies should be reviewed and revised on a periodic basis to ensure compliance with employment laws and contemporary personnel management processes; and

**Whereas**, State and Federal laws and regulations, and employment best practices, continue to evolve, and the City Council is committed to keeping pace with these changes;

**NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Sandy**

This resolution is adopted by the Common Council of the City of Sandy and approved by the Mayor this 05 day of June 2023

\_\_\_\_\_  
Stan Pulliam, Mayor

ATTEST:

\_\_\_\_\_  
Jeff Aprati, City Recorder

#2023-18

**EXHIBIT A**

# **City of Sandy Personnel Policies**



Effective July 1, 2023



Welcome to the City of Sandy, we're glad to have you on our team. At the City of Sandy, we believe that our employees are our most valuable asset. In fact, we attribute our success as an organization in significant part to our ability to recruit, hire, and maintain a motivated and productive workforce. We hope that during your employment with the City of Sandy, you will become a productive and successful member of City of Sandy's team.

This employee handbook describes, in summary, the personnel policies and procedures that govern the employment relationship between the City of Sandy and its employees, other than those found in applicable collective bargaining agreements. The policies stated in this handbook are subject to change at any time at the sole discretion of the City of Sandy with or without prior notice. This handbook supersedes any prior handbooks or written policies of the City of Sandy that are inconsistent with its provisions. It does not, however, substitute for collective bargaining agreement provisions. To the extent that a provision in a valid collective bargaining agreement contradicts or is inconsistent with what is in this Employee Handbook, the collective bargaining agreement provision controls.

This handbook does not create a contract of employment between the City of Sandy and its employees. With the exception of employees subject to a collective bargaining agreement, all employment at City of Sandy is "at will." That means that either you or the City of Sandy may terminate this relationship at any time, for any reason, with or without cause or notice (unless you are subject to a collective bargaining agreement or written contract of employment). No supervisor, manager, or representative of City of Sandy other than the City Manager has the authority to enter into any agreement with you regarding the terms of your employment that changes our at-will relationship or deviates from the provisions in this handbook, unless the change or deviation is put in writing and signed by the City Manager (or that is included in a collective bargaining agreement).

You may receive updated information concerning changes in policy from time to time, and those updates should be kept with your copy of the handbook. If you have any questions about any of the provisions in the handbook, or any policies that are issued after the handbook, please ask the Human Resources Director.

Sincerely,

Tyler Deems  
Interim City Manager

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## I. Equal Employment Opportunity (EEO) Policies

The following EEO Policies apply to all employees. Members of management, elected officials, and employees alike are expected to adhere to and enforce the following EEO Policies. Any employee's failure to do so may result in discipline, up to and including termination.

All employees are encouraged to discuss these EEO Policies with the HR Director at any time if they have questions relating to the issues of harassment, discrimination, or bullying.

### *A. No-Discrimination, No-Retaliation Policy*

The City of Sandy provides equal employment opportunity to all qualified employees and applicants without unlawful regard to race, color, religion, gender identity, pregnancy (including childbirth and related medical conditions), sexual orientation, national origin, age, disability, genetic information, veteran's status, domestic violence victim status, or any other status protected by applicable federal, Oregon, or local law. The City of Sandy also recognizes an employee's right to engage in protected activity under Oregon and federal law, as discussed in various policies below, and will not retaliate against an employee for engaging in protected activity.

For purposes of this and all other City of Sandy policies, "race" is defined to include physical characteristics that are historically associated with race, including but not limited to natural hair, hair texture, hair type and protective hair styles. Further, "protective hairstyles" is defined as "hairstyle, hair color or manner of wearing hair, including braids (regardless of whether the braids are created with extensions or styled with adornments, locks, and twists)".

The City of Sandy's commitment to equal opportunity applies to all aspects of the employment relationship – including but not limited to, recruitment, hiring, compensation, promotion, demotion, transfer, disciplinary action, layoff, recall, and termination of employment.

### *B. Diversity Equity and Inclusion (DEI) Statement*

The City of Sandy is committed to integrating equity into the fabric of our organization and the delivery of public services, in pursuit of equal, fair, and just outcomes for all. The City of Sandy will work intentionally and collaboratively to eliminate racial disparities and address the long-term, systemic root causes of inequality and racial injustice.

### *C. Statement Regarding Pay Equity*

The City of Sandy supports Oregon's Pay Equity Law and federal and Oregon laws prohibiting discrimination between employees based on a protected class (as defined by Oregon law) in the payment of wages or other compensation for work of comparable character. Employees who believe they are receiving wages or other compensation at a rate less than that of which the City of Sandy pays wages or other compensation to other employees for work of comparable character are encouraged to discuss the issue with the HR Director.

#### *D. No-Harassment Policy*

The City of Sandy prohibits harassment and sexual assault in the workplace, or harassment and sexual assault outside the workplace that violates its employees, volunteers, and interns' right to work in a harassment-free workplace. Specifically, the City of Sandy prohibits harassment or conduct related to an individual's race, color, religion, sex, pregnancy, sexual orientation, gender identity, national origin, age, disability, genetic information, veteran status, domestic violence victim status, or any other protected status or activity recognized under Oregon, federal, or local law.

Each member of management is responsible for creating an atmosphere free of discrimination, harassment, and sexual assault. Further, all employees are responsible for respecting the rights of other employees and to refrain from engaging in conduct prohibited by this policy, regardless of the circumstance, and regardless of whether others participate in the conduct or did not appear to be offended. All employees are encouraged to discuss this policy with their immediate supervisor, any member of the management team, or with the HR Director, at any time if they have questions relating to the issues of discrimination or harassment.

This policy applies to and prohibits sexual or other forms of harassment that occur during working hours, during City of Sandy -related or -sponsored trips (such as conferences or work-related travel), and during off-hours when that off-duty conduct creates an unlawful hostile work environment for any of City of Sandy's employees. **Such harassment is prohibited whether committed by City of Sandy employees or by non-employees, such as elected officials, members of the community, volunteers, interns, and vendors.**

#### Sexual Harassment

Sexual harassment includes unwelcome sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature (regardless of whether such conduct is "welcome"), when:

- Submission to such conduct is made either implicitly or explicitly a term or condition of employment;
- Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual; or
- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive work environment.

Some examples of conduct that could give rise to sexual harassment are unwanted sexual advances; demands for sexual favors in exchange for favorable treatment or continued employment; sexual jokes; flirtations; advances or propositions; verbal abuse of a sexual nature; comments about an individual's body, sexual prowess, or deficiency; unwelcoming touching or assault; sexually suggestive, insulting, or obscene comments or gestures; displays of sexually suggestive objects or pictures; or making derogatory remarks about individuals who are gay, lesbian, bisexual or transgender; or discriminatory treatment based on sex. This is not a complete list.

### Other Forms of Prohibited Harassment

City of Sandy policy also prohibits harassment against an individual based on the individual's race, color, religion, national origin, age, sex, pregnancy, sexual orientation, gender identity, national origin, age, disability, genetic information, veteran status, domestic violence victim status, and any other status or activity recognized under Oregon, federal or local law.

Such harassment may include verbal, written or physical conduct that denigrates makes fun of, or shows hostility towards an individual because of any protected class, or protected activity, and can include:

- Jokes, pictures (including drawings), epithets, or slurs;
- Negative stereotyping;
- Displaying racist symbols anywhere on City of Sandy property;
- "Teasing" or mimicking the characteristics of someone with a physical or mental disability;
- Criticizing or making fun of another person's religious beliefs, or "pushing" your religious beliefs on someone who doesn't have them;
- Threatening, intimidating, or hostile acts that relate to a protected class; or protected activity;
- Written or graphic material that denigrates or shows hostility or aversion toward an individual or group because of the protected status; or
- Negative comments or teasing a person about their natural hair, hair texture, hair type or hair style (see definition of "race" on page 1). Employees may not touch another employee's hair without permission to do so, even if the touch is extended out of curiosity or as a compliment.

This is not a complete list. All employees are expected to exercise common sense and refrain from other similar kinds of unprofessional conduct.

### Complaint Procedure

Each member of management is responsible for creating an atmosphere free of discrimination, harassment, and bullying. Further, all employees are responsible for respecting the rights of other employees and strictly adhering to the letter and spirit of this policy. All employees, volunteers or interns are encouraged to discuss this policy with their immediate supervisor, any member of the management team, or the HR Director, at any time if they have questions relating to the issues of discrimination, harassment, or bullying.

Employees are strongly encouraged to tell the harasser that the behavior is offensive and unwanted, and that they want it to stop. Employees who have experienced any harassment, discrimination, or bullying, are expected, and required to bring the matter to the attention of Human Resources or a supervisor or member of management as soon as possible.

In addition, any employee who observes any conduct that he or she believes constitutes harassment, discrimination, or bullying, or who receives information about these types of incidents that may have occurred, must immediately report the matter to the HR Director.

### Investigation and Confidentiality

All complaints and reports will be promptly and impartially investigated and will be kept confidential to the extent possible, consistent with City of Sandy's need to investigate the complaint and address the situation. If conduct in violation of this policy is found to have occurred, City of Sandy will take prompt, appropriate corrective action, and any employee found to have violated this policy will be subject to disciplinary action, up to and including termination of employment.

Employees who have been subjected to harassment, sexual assault, or discrimination are encouraged to use the City of Sandy's complaint-reporting procedure, described above, to ensure a timely, thorough investigation and handling of the situation. Employees may, however, seek redress from the Oregon Bureau of Labor and Industries (BOLI) pursuant to ORS 659A.820 to 659A.865, or in a court under any other available law, whether criminal or civil. Although the City of Sandy cannot provide employees with legal advice, employees should be aware of the statute of limitations applicable to harassment or discrimination claims under ORS 659A.030, 659A.082 or 659A.121 (five years). Further, before an employee can take any legal action against the City of Sandy, the employee must provide written notice of the claim within 180 days of the act or omission the employee claims has caused him/her harm. When an employee can prove harm as a result of unlawful harassment or discrimination in an administrative proceeding or in a court, remedies available to the employee include enforcement of a right, imposition of a penalty, or issuance of an order to the employee's employer (in limited circumstances).

### Protection against Retaliation

City of Sandy prohibits retaliation in any way against any employee because the employee has made a good-faith complaint pursuant to this policy or the law, has reported (in good faith) sexual assault, harassing, discriminatory, or discriminatory conduct, or has participated in an investigation of such conduct.

Employees who believe they have been retaliated against in violation of this policy should immediately report it to the HR Director or any supervisor or member of management. Any employee who is found to have retaliated against another employee in violation of this policy will be subject to disciplinary action up to and including termination of employment.

See *also* the No-Discrimination, No-Retaliation Policy, above, and the Reporting Improper and Unlawful Activity Policy, below.

### Other Resources Available to Employees

The City of Sandy provides an Employee Assistance Program (EAP) through Canopy to employees and dependents. For access to confidential help 24 hours a day, seven days a week, call toll-free: 1-800-433-2320, or go online to [www.canopywell.com](http://www.canopywell.com). The EAP program provides confidential counseling services and educational tools such as resources relating to eldercare, childcare, legal consultation, financial coaching, identity theft, and others.

The City of Sandy cannot provide legal resources to its employees or referrals to specific attorneys. Employees may contact the Oregon State Bar for more information: <https://www.osbar.org/public/>.

### Other Employee Rights

Nothing in this policy is intended to diminish or discourage an employee who has experienced workplace harassment or discrimination, or sexual assault, from talking about or disclosing his/her experience.

The City of Sandy is committed to creating and maintaining a workplace free of sexual assault, harassment, discrimination, and retaliation and it has confidence in the process it has developed for addressing good-faith complaints. However, Oregon law requires the City of Sandy to inform employees that if they have been aggrieved by workplace harassment, discrimination or sexual assault and want to enter into an agreement with the City of Sandy regarding his/her experience and/or employment status, the employee should contact Human Resources. The employee's request to enter into such an agreement must be in writing (email or text is acceptable). Requests of this nature will be considered on a case-by-case basis; such agreements are not appropriate for every situation. If the City of Sandy and employee do reach an agreement, the City of Sandy will not require an employee to enter into a nondisclosure agreement (which would prohibit the employee from discussing or communicating about his/her experiences in the workplace or the terms of the agreement) or a non-disparagement agreement (which would prohibit the employee from speaking slightly about the City of Sandy or making comments that would lower the City of Sandy in rank or reputation). If, however, the employee makes a request for an agreement under this paragraph, nondisclosure and non-disparagement are terms that the City of Sandy and the employee may agree to. The employee will have seven days to revoke the agreement after signing it.

### *E. No-Bullying Policy*

City of Sandy strives to promote a positive, professional work environment free of physical or verbal harassment, "bullying," or discriminatory conduct of any kind. The City of Sandy, therefore, prohibits employees from bullying one another or engaging in any conduct that is disrespectful, insubordinate, or that creates a hostile work environment for another employee for any reason. For purposes of this policy, "bullying" refers to repeated, unreasonable actions of individuals (or a group) directed towards an individual or a group of employees, which is intended to intimidate and that creates a risk to the health and safety of the employee(s). Examples of bullying include:

- Verbal Bullying: Slandering, ridiculing, or maligning a person or his/her family; persistent name calling that is hurtful, insulting or humiliating; using a person as butt of jokes; abusive and offensive remarks.
- Physical Bullying: Pushing; shoving; kicking; poking; tripping; assault, or threat of physical assault; damage to a person's work area or property.
- Gesture Bullying: Non-verbal threatening gestures, glances that can convey threatening messages.
- Exclusion Bullying: Socially or physically excluding or disregarding a person in work-related activities. In some cases, failing to be cooperative and working well with co-workers may be viewed as bullying.

- **Cyber Bullying:** Bullying that takes place using electronic technology, which includes devices and equipment such as cell phones, computers, and tablets as well as communication tools including social media sites, text messages, chat, and websites. Examples of cyberbullying include transmitting or showing mean-spirited text messages, emails, embarrassing pictures, videos or graphics, rumors sent by email or posted on social networking sites, or creating fake profiles on web sites for co-workers, managers or supervisors or elected officials.

Employees who have experienced bullying in violation of this policy, who have witnessed an incident of bullying, or who have credible information about an incident, are expected and should bring this matter to the attention of their supervisor or a member of management as soon as possible. If conduct in violation of this policy is found to have occurred, the City of Sandy will take prompt, appropriate action, and any employee found to have violated this policy will be subject to disciplinary action, up to and including termination of employment.

#### *F. Disability Accommodation Policy*

City of Sandy is committed to complying fully with the Americans with Disabilities Act (ADA) and Oregon's disability accommodation and anti-discrimination laws. We are also committed to ensuring equal opportunity in employment for qualified persons with disabilities.

##### Accommodations

City of Sandy will make reasonable efforts to accommodate a qualified applicant or employee with a known disability, unless such accommodation creates an undue hardship on the operation of City of Sandy.

##### Requesting an Accommodation

A reasonable accommodation is any change or adjustment to a job or work environment that does not cause an undue hardship on the department or unit (or, in some cases, City of Sandy) and that permits a qualified applicant or employee with a disability to participate in the job application process, to perform the essential functions of a job, or to enjoy benefits and privileges of employment equal to those enjoyed by employees without disabilities. For example, a reasonable accommodation may include providing or modifying equipment or devices, job restructuring, allowing part-time or modified work schedules, reassigning an individual, adjusting, or modifying examinations, modifying training materials or policies, providing readers and interpreters, or making the workplace readily accessible to and usable by people with disabilities.

Employees should request an accommodation as soon as it becomes apparent that a reasonable accommodation may be necessary to enable the employee to perform the essential duties of a position. All requests for accommodation should be made with the HR Director and should specify which essential functions of the employee's job cannot be performed without a reasonable accommodation. In most cases, an employee will need to secure medical verification of his or her need for reasonable accommodation.



### *G. Pregnancy Accommodation Policy*

Employees who are concerned that their pregnancy, childbirth, or a related medical condition (including lactation) will impact their ability to work should contact Human Resources to discuss their options for continuing to work and, if necessary, leave of absence options. The City of Sandy will provide one or more reasonable accommodations pursuant to this policy for employees with known limitations unless such accommodations impose an undue hardship on the City of Sandy's operations.

Although this policy refers to "employees," the City of Sandy will apply this policy equally to an applicant with known limitations caused by pregnancy, childbirth, or a related medical condition.

#### Requesting a Pregnancy-Related Accommodation

Employees who are concerned that their pregnancy, childbirth, or a related medical condition will limit their ability to perform their duties should request an accommodation as soon as it becomes apparent that a reasonable accommodation may be necessary to enable the employee to work. All requests for accommodation should be made with Human Resources and should specify which essential functions of the employee's job cannot be performed without a reasonable accommodation. In most cases, information from the employee's doctor may be needed to assist the City of Sandy and the employee find an effective accommodation, or to verify the employee's need for an accommodation. Both the City of Sandy and employee must monitor the employee's accommodation situation and make adjustments as needed.

#### No Discrimination, No Retaliation

The City of Sandy prohibits retaliation or discrimination against any employee who, under this policy: (1) asked for information about or requested accommodations; (2) used accommodations provided by the City of Sandy; or (3) needed an accommodation.

Employees who ask about, request, or use accommodations under this policy and applicable Oregon law have the right to refuse an accommodation that is unnecessary for the employee to perform the essential functions of the job or when the employee does not have a known limitation. Under Oregon law, an employer can't require an employee to use FMLA if a reasonable accommodation can be made that doesn't impose an undue hardship on the operations of the City of Sandy. Also, no employee will be denied employment opportunities if the denial is based on the need of the City of Sandy to make reasonable accommodations under this policy.

#### Leave of Absence Options for Pregnant Employees

Employees who are pregnant or experiencing pregnancy-related medical conditions should also be aware of their leave of absence options under the Family Medical Leave Act. See policies later in this document or speak with the HR Director.

### *H. Reporting Improper or Unlawful Conduct – No Retaliation*

Employees may report concerns about the City of Sandy's compliance with any law, regulation, or policy, using one of the methods identified in this policy. The City of Sandy will not retaliate against employees who disclose information that the employee reasonably believes is evidence of:

- A violation of any federal, Oregon, or local law, rules or regulations by the City of Sandy;
- Mismanagement, gross waste of funds, abuse of authority, or substantial and specific danger to public health resulting from action of the City of Sandy;
- A substantial and specific danger to public health and safety resulting from actions of the City of Sandy; or
- The fact that a recipient of government services is subject to a felony or misdemeanor arrest warrant.

Further, in accordance with Oregon law, the City of Sandy will not prohibit an employee from discussing the activities of a public body or a person authorized to act on behalf of a public body with a member of the Legislative Assembly, legislative committee staff acting under the direction of a member of the Legislative Assembly, any member of the elected governing body of a political subdivision, or an elected auditor of a city, county, or metropolitan service district.

#### Employee Reporting Options

In addition to the City of Sandy's Open-Door Policy (see section I), employees who wish to report potential improper or unlawful conduct should first talk to his or her supervisor. If you are not comfortable speaking with your supervisor, or you are not satisfied with your supervisor's response, you are encouraged to speak with the HR Director. Supervisors and managers are required to inform the HR Director about reports of improper or unlawful conduct they receive from employees.

Reports of unlawful or improper conduct will be kept confidential to the extent allowed by law and consistent with the need to conduct an impartial and efficient investigation.

If the City of Sandy were to prohibit, discipline, or threaten to discipline an employee for engaging in an activity described above, the employee may file a complaint with the Oregon Bureau of Labor and Industries or bring a civil action in court to secure all remedies provided for under Oregon law.

#### Additional Protection for Reporting Employees

Oregon law provides that, in some circumstances, an employee who discloses a good faith and objectively reasonable belief of the City of Sandy's violation of law will have an "affirmative defense" to any civil or criminal charges related to the disclosure. For this defense to apply, the disclosure must relate to the conduct of a coworker or supervisor acting within the course and scope of his or her employment. The disclosure must have been made to either: (1) a state or federal regulatory agency; (2) a law enforcement agency; (3) a manager with the City of Sandy; or (4) an Oregon-licensed attorney who represents the employee making the report/disclosure. The defense also only applies in situations where the information disclosed was lawfully accessed by the reporting employee.

#### Policy Against Retaliation

The City of Sandy will not retaliate against employees who make reports or disclosures of information of the type described above when the employee reasonably believes he or she is disclosing information about conduct that is improper or unlawful.

In addition, the City of Sandy prohibits retaliation against an employee because he or she participates in good faith in any investigation or proceeding resulting from a report made pursuant to this policy. Further, no City of Sandy employee will be adversely affected because they refused to carry out a directive that constitutes fraud or is a violation of local, Oregon, federal or other applicable laws and regulations. The City of Sandy may take disciplinary action (up to and including termination of employment) against an employee who has engaged in retaliatory conduct in violation of this policy.

This policy is not intended to protect an employee from the consequences of his or her own misconduct or inadequate performance simply by reporting the misconduct or inadequate performance. Furthermore, an employee is not entitled to protections under this policy if the City of Sandy determines that the report was known to be false, or information was disclosed with reckless disregard for its truth or falsity. If such a determination is made, an employee may be subject to discipline up to and including termination of employment.

## II. Classification and Compensation

### A. Probationary Period of Employment

All new employees, including current employees who are promoted or transferred within the City of Sandy, are hired into a probationary period that generally lasts no less than six months. The probationary period is an extension of the employee selection process. During this period, you are considered to be in training and under observation and evaluation by your manager. Evaluation of your adjustment to work tasks, conduct and other work rules, attendance and job responsibilities will be considered during the probationary period. This period gives you an opportunity to demonstrate satisfactory performance for the position, and provides an opportunity to determine if your knowledge, skills and abilities and the requirements of the position match. It is also an opportunity for you to decide if the City of Sandy meets your expectations of an employer.

At or before the end of the probationary period, a decision about your employment status will be made. The City of Sandy will decide whether to: (1) Extend your probationary period; (2) Move you to regular, full-time or regular, part-time status; or (3) Terminate your employment.

Employees are not guaranteed any length of employment upon hire or transfer/promotion; both you and City of Sandy may terminate the employment relationship during the probationary period for any lawful reason. Further, completion of the probationary period or continuation of employment after the probationary period does not entitle you to remain employed by City of Sandy for any definite period. Both you and City of Sandy are free to terminate the employment relationship, at any time, with or without notice and for any reason not prohibited by law.

### B. Employee Classification

City of Sandy classifies employees as follows:

- Regular Full-time: Employment in an established position requiring 35 - 40 hours or more of work per week. Full-time employees are eligible to participate in City of Sandy's benefit programs.

- Regular Part-time: Employment requiring 20 - 34.99 hours of work per week. Normally a part-time schedule, such as portions of days or weeks, will be established. Occasional workweeks of over 40 hours will not constitute a change in status from part-time to full-time. Regular, part-time employees working less than 30 hours per week are not eligible for benefits except those mandated by applicable law, (for example, sick leave). They will accrue vacation based on their pro-rated schedule.
- On-Call: Employment which varies in nature and does not have a predetermined or predictable schedule. Occasional workweeks with a predetermined schedule will not constitute a change in status from on-call to part-time or full-time. On-call employees are not eligible for benefits other than those mandated by applicable law (for example, sick leave)
- Temporary/Seasonal/Interns: Employment in a job established for a specific purpose or project, for a specific period (typically less than six months), or for the duration of a specific project or group of assignments. This category of employment can either be full-time or part-time. These employees are not eligible for benefits other than those mandated by applicable law (for example, sick leave).

Additionally, all employees are defined by federal and Oregon law as either “exempt” or “nonexempt,” which determines whether the employee is eligible for overtime. Employees will be instructed as to whether they are exempt or non-exempt at the time of hire or when a promotion or demotion occurs. All employees, regardless of employment classification, are subject to all City of Sandy rules and procedures.

### *C. Employment Changes*

#### Transfers

Requests from employees for transfers from one department to another shall be made in writing and shall be directed to the employee’s present department director and referred to the appropriate department director and the HR Director. Such requests shall be given consideration when a suitable vacancy occurs; however, no employee shall be transferred to a position for which she/he does not possess the minimum qualifications.

#### Promotions

All qualified vacancies shall, whenever possible, be filled by promoting qualified employees within City service. Notification of open positions will be made via email to all staff. Nevertheless, the City Manager may recruit from outside City service whenever it is reasonable to believe that better qualified candidates are available outside current employees. The appointment to fill the vacancy shall be made on a competitive basis, where qualifications and ability are relatively equal, seniority within City service shall be the determining factor.

#### Layoffs

If there are changes of duties in the organization, lack of work, or lack of funds, the City Manager may lay off employees; however, the City Manager shall first make every reasonable effort to integrate those employees into another department by transfer. When layoffs are required, the City Manager shall base the decision on relative merit and shall give due consideration to

seniority in City service only where the employee’s qualification and ability are relatively equal. Layoffs shall be for a period not to exceed six months. After six months, employees not reinstated will be terminated (see section VI, Termination of Employment).

Rehires

Temporary/Seasonal/Intern employees are eligible for rehire to the same or substantially similar position within twelve months of separating from service of City of Sandy. The employee must have separated from service in good standing to be eligible for rehire. The employee must express interest in the position in writing to the HR Director. The employee will be subject to all the same requirements of a newly hired employee, including but not limited to, background check, driving record check, and drug test, if required for the position. The employee will not need to re-start the probationary period if rehired in the same position.

*D. The Workweek*

The workweek is a seven-day work period beginning Monday at 12:00 a.m. through Sunday at 11:59 p.m. Typically, business hours are from Monday through Friday 8:00 a.m. through 5:00 p.m. Departments may have different workweeks or business hours depending on their individual needs.

*E. Meal Periods and Rest Breaks*

Nonexempt employees are required to take a paid, uninterrupted 10-minute rest break for every four-hour segment or major portion thereof in the work period. The rest break should be taken in the middle of each segment, whenever possible. Whenever a segment exceeds two hours, the employee must take a rest break for that segment.

Nonexempt employees are required to take at least a 30-minute unpaid meal period when the work period is six hours or greater. The law requires an uninterrupted period in which the employee is relieved of all duties. No meal period is required if the work period is less than six hours. If, because of the nature or circumstances of the work, an employee is required to remain on duty or to perform any tasks during the meal period, the employee must inform his or her supervisor before the end of the shift so that the City of Sandy may pay the employee for that work. Meal periods and rest breaks are mandatory and are not optional. An employee’s meal period and rest break(s) may not be taken together as one break. Meal periods and rest breaks may not be “skipped” in order to come in late or leave early. An employee who fails to abide by this policy and applicable laws may be subjected to discipline, up to and including termination.

<b><u>Length of Work Period</u></b>	<b><u>Rest Breaks</u></b>	<b><u>Meal Periods</u></b>
2 hours or less	0	0
2 hours & 1 min – 5 hours & 59 minutes	1	0
6 hours	1	1
6 hours & 1 minutes – 10 hours	2	1
10 hours & 1 minutes – 13 hours & 59 minutes	3	1

#### *F. Rest Breaks for Expression of Breast Milk*

The City of Sandy will provide reasonable rest periods to accommodate an employee who needs to express milk for her child eighteen (18) months of age or younger. If possible, the employee will take the rest periods to express milk at the same time as the rest breaks or meal periods that are otherwise provided to the employee. If not possible, the employee is entitled to take reasonable time as needed to express breast milk.

The City of Sandy will treat the rest breaks used by the employee for expressing milk as paid rest breaks up to the amount of time the City of Sandy is required to provide as paid rest breaks and/or meal periods under applicable personnel rules or collective bargaining agreements. Additional time needed beyond the paid rest breaks and/or meal periods may be taken as unpaid time.

If an employee takes unpaid rest breaks, the City of Sandy may, at the discretion of the employee's supervisor, allow the employee to work before or after her normal shift to make up the amount of time used during the unpaid rest periods. The City of Sandy will allow, but not require, an employee to substitute paid leave time for unpaid rest periods taken in accordance with this rule.

The City of Sandy will make a reasonable effort to provide the employee with a private location within close proximity to the employee's work area to express milk. For purposes of this policy, "close proximity" means within walking distance from the employee's work area that does not appreciably shorten the rest or meal period. A "private location" is a place, other than a public restroom or toilet stall, in close proximity to the employee's work area for the employee to express milk concealed from view and without intrusion by other employees or the public.

If a private location is not within close proximity to the employee's work area, the City of Sandy will identify a private location the employee can travel to. The travel time to and from the private location will not be counted as a part of the employee's break period.

#### Notice

An employee who intends to express milk during work hours must give their supervisor or HR Director reasonable oral or written notice of her intention to do so in order to allow the City of Sandy time to make any preparations necessary for compliance with this rule.

#### Storage

Employees are responsible for storing expressed milk. Employees may bring a cooler or other insulated food container to work for storing the expressed milk. If an office provides access to refrigeration for personal use, an employee who expresses milk during work hours may use the available refrigeration.

## *G. Overtime*

### Time-and-a-Half

The City of Sandy pays one and one-half times a non-exempt employee's hourly rate for all hours worked over 40 in any workweek. See "Employee Classification," above. Compensatory time cannot be used towards calculating hours worked.

### Assignment of Overtime Work

You may be required to work overtime. When overtime work is required by City of Sandy on a particular job on a shift commencing on a day other than Saturday, Sunday, or a holiday, the non-exempt employee performing that job at the conclusion of his or her straight-time hours will normally be expected to continue to perform the job on an overtime basis.

When overtime is required by the City of Sandy on a Sunday or on a holiday, City of Sandy will endeavor to give the employees required to work notice of their assignment during their last shift worked prior to such Sunday or Holiday.

### Supervisor Authorization

No overtime may be worked by non-exempt employees unless specifically authorized in writing by a supervisor or management. Employees who work unauthorized overtime may be subject to discipline up to and including termination.

### Compensatory (Comp) Time

Overtime hours can be paid or, at the employee's option with City of Sandy approval, accumulated at time and one-half up to a maximum of 80 hours and taken as comp time off. When an employee is separated from employment with the City of Sandy, any remaining comp time will be paid to the employee.

## *H. Standby Pay*

### Public Works and SandyNet

At the discretion of the respective Director, the staff may be assigned to standby duty on weekends and after normal working hours on weekdays. Compensation for standby duty for a one-week period will be equivalent to ten (10) hours worked. Standby duty that falls on an observed holiday will be compensated at the equivalent to an additional 2.5 hours. Employees on standby duty will have no restrictions on their activities other than:

- Remaining within the metro area;
- Being reachable at all times; and
- Refraining from use of alcohol or other substances that would impair judgement or ability to perform work.

Employees assigned to standby duty will, when called out, be compensated based on the actual time worked, including travel time, with two hours minimum time credited. Employees called out who are not on standby duty (and, therefore, not receiving standby pay) will be credited for actual time worked, including travel time, with a minimum of two hours.

## Police

Patrol Sergeants shall be assigned to Standby Duty as a regular function of their position. Compensation for Standby Duty for a one-day (24 hour) period will be equivalent to one (1) hour of time worked at their normal hourly wage. Standby duty that falls on a city recognized holiday will be compensated at the equivalent of one and one half (1.5) hours for a one-day (24 hour) period. Patrol Sergeants will have no restrictions on their activities other than:

- Remaining within the metro area;
- Being reachable at all times; and
- Refraining from use of alcohol or other substances that would impair judgement or ability to perform work.

When it is determined that a call out response is necessary, Patrol Sergeants will be compensated at their standard overtime rate based on the actual time worked in lieu of the standby duty pay, including travel time, with a minimum of two (2) hours credited.

It is recognized that certain unforeseen circumstances (individual or family illness, emergency, etc.) can result in Patrol Sergeants who are on standby duty not being able to fulfill the duties listed. During these times, the Patrol Sergeant on standby will need to notify the Chief of Police or Lieutenant as soon as is possible of the circumstance so their duties can be reassigned. Standby Duty pay will resume for this member once they are able to take over the required duties.

### *I. Flexible and Telecommuting Work Schedules*

At the discretion of an employee's supervisor, regular full-time employees may request flexible or telecommuting work scheduling of their work hours on a case-by-case basis. **Flexible schedules** allow for employees to work more hours than scheduled one day in exchange for working a lesser number of hours another day during a given seven- or fourteen-day work period. **Telecommuting** is defined as a process for eligible employees to establish a schedule that includes working from an alternative location other than the normal work location (typically a city facility). Employees must enter into a written agreement with the employee's supervisor stating the flexible schedule or telecommuting agreement. Some departments may be unable to offer flexible or telecommuting schedules for certain positions and/or during certain times of the year.

### *J. Bilingual Pay*

Bilingual pay equal to 3% of an employee's base salary will be granted to employees who are bilingual. This pay incentive is only applicable to employees who are bilingual in a language that is used to serve the population in which their position works with. Competency, usage, and job requirements will be determined by the department director, who will recommend the pay increase to the City Manager for final approval.



### *K. Timekeeping Requirements*

All non-exempt employees must accurately record time worked via electronic timecard for payroll purposes. Filling out another employee's timecard, allowing another employee to fill out your timecard, or altering any timecard will be grounds for discipline up to and including termination. An employee who fails to record his or her time may be subjected to discipline as well.

Salaried exempt employees are required to record their time away from the office (for example, sick, vacation, and holiday) via electronic timecard.

### *L. Employee-Incurred Expenses and Reimbursements*

The City of Sandy will pay actual and reasonable business-related expenses you incur in the performance of your job responsibilities if they are: (1) listed below or elsewhere in this handbook; and (2) pre-approved by your supervisor/manager before they are incurred. The City of Sandy will not pay for or reimburse the costs incurred by a spouse, registered same-sex domestic partner or travel companion who accompanies the employee on City of Sandy approved travel.

Employees must provide a completed and signed expense report and evidence of proof of purchase (receipts) within one month of the expense being incurred or the employee risks forfeiting their payment or reimbursement. All reimbursements will be processed via monthly payroll as a non-taxable item.

Some examples of actual and reasonable business-related expenses that the City of Sandy will reimburse/pay for include:

- *Conferences or Workshops:* Employees will be reimbursed for authorized conferences or workshops directly related to their position with City of Sandy;
- *Education:* Employees will be reimbursed for authorized educational expenses directly related to their position with City of Sandy;
- *Meals:* Employees will be reimbursed for reasonable meal expenses incurred while conducting official City of Sandy business; and
- *Mileage and Parking:* Employees will be reimbursed for authorized use of their personal vehicles at a rate established by the Internal Revenue Service for travel **outside** of City limits only. Reasonable parking costs are also reimbursed upon submission of receipts on an expense report. Any traffic citations or court-ordered fees relating to driving or parking offenses (including parking tickets) are the responsibility of the employee and will not be reimbursed by City of Sandy.

### *M. Payroll Policies*

All employees will be paid monthly. The pay period is defined as the 24<sup>th</sup> – 23<sup>rd</sup>. Payday is the last working day of each month for all employees.

The City of Sandy does not provide advance payments of salary or loans from salary to be earned.

Employees are eligible for a step increase annually, dependent upon the availability of such an increase in the current salary schedule. Step increases will take effect the first day of the pay period following their anniversary date.

Net pay will be directly deposited into the employee's bank account unless an employee requests otherwise. Checks are available for pick up at City Hall. If an employee requests to pick up his/her check from City of Sandy, only the employee named on the paycheck will be allowed to do so unless the employee provides written permission to City of Sandy for someone else to receive the check.

#### *N. Statement Regarding Pay Practices*

The City of Sandy makes all efforts to comply with applicable Oregon and federal wage and hour laws. In the event you believe that the City of Sandy has made any improper deductions, has failed to pay you for all hours worked or for overtime, or has failed to properly calculate your wages in any way, you must immediately report the error to Human Resources. City of Sandy will investigate all reports of improper pay practices and will reimburse employees for any improper deductions or omissions. No employee will suffer retaliation or discrimination because he or she has reported any errors or complaints regarding the City of Sandy's pay practices.

#### *O. Position Classification Policies*

The City Council is responsible for adopting and amending a position classification and compensation plan for all employees. This classification plan shall consist of all positions in City service defined by range specifications and identified by position title. The classification plan shall be so developed and maintained that all positions substantially similar with respect to duties, responsibilities, authority, and character of work are included within the same range and that the same schedules of compensation may be made to apply with equity under like working conditions to all positions in the same range. Copies of this plan are available in the HR Director's office.

Positions may be reclassified whenever the duties of the position change materially, provided that the reclassification can be accomplished within the limitations of the current budget cycle. Reclassification of a position shall not be used to circumvent the effects of disciplinary action or to avoid restrictions concerning compensation.

The HR Director shall be responsible for keeping the classification current through periodic studies of positions within City service. Neighboring communities, as well communities of similar population size shall be used as comparators for salary and benefit purposes. The City Manager, with the help of the HR Director, shall examine the salary range for each class of position and determine whether the current minimum and maximum salaries should be maintained, increased, or decreased for the following year. Changes in cost of living, utilizing the CPI (Consumer Price Index) shall be considered during this evaluation.

Except in extenuating circumstances, all appointments will be made at the first step of the class for the position.

### *P. Reporting Changes to an Employee's Personal Data*

Because personnel records are used to administer pay and benefits, and other employment decisions, employees are responsible for keeping information current regarding changes in name, address, phone number, exemptions, dependents, beneficiary, etc. Keeping your personnel records current can be important to you with regard to pay, deductions, benefits and other matters. If you have changes in any of the following items, please notify the HR Director to assure that the proper updates/paperwork are completed as quickly as possible:

- Name;
- Marital status/Domestic Partnership (for purposes of benefit eligibility determination only);
- Address or telephone number;
- Dependents;
- Person to be notified in case of emergency;
- Other information having a bearing on your employment; and
- Tax withholding.

Employees may not intentionally withhold information from the City of Sandy about the items listed above in order to continue to receive benefits or anything of value for themselves or anyone else. Upon request, the City of Sandy may require employees to provide proof of marital status/domestic partnership status. Employees who violate this policy may be subject to discipline, up to and including termination.

### *Q. Relatives in City Service*

Relatives of current employees, or individuals involved in an intimate personal or financial relationship with a current employee, are eligible for hire at the City of Sandy subject to the same selection process and job requirements and will be evaluated in the same manner as any other applicant. However, persons will not be hired or promoted into positions in which one family member (as defined by Oregon law) or person involved in an intimate personal or financial relationship, would fall under the direct line of supervision of the other family member or partner.

All employees shall avoid being in a position where they are subject to supervisory or oversight authority by a family member, member of their household, or a person with whom they have an intimate personal or financial relationship. If the relative relationship is established after employment as a result of organizational restructure, marriage, or a development of an intimate personal or financial relationship, the employees involved have an obligation to immediately inform their supervisor, or Human Resources. The employees and the City of Sandy will jointly make a good faith effort to find an alternative assignment for one of the two employees. Depending on business need, this may include, but is not limited to restructuring duties, assignment to another position, and assignment to another shift or change in supervision. If no alternative assignment is available, the two employees will have 30 days to decide who will resign. If a decision is not made within 30 days, the City of Sandy will make the final decision, based on the City of Sandy's operational and financial needs.

Policy violations including, but not limited to, failure to disclose a family relation, or an intimate personal or financial relationship, will be investigated by the City of Sandy. Policy violations may result in progressive discipline of employees, up to and including termination of employment. Supervisors and lead workers may be disciplined for taking employment actions based upon the relationship.

#### *R. Performance Reviews*

All City of Sandy employees will receive periodic performance reviews. Performance reviews serve as one factor in decisions related to employment, such as training, merit pay increases, job assignments, employee development, promotions, retention, and discipline/termination. Any employee who fails to satisfactorily perform the duties of their position is subject to disciplinary action (including termination).

The City of Sandy's goal is to provide an employee with his/her first formal performance evaluation within six months to one year after hire or promotion. After the initial evaluation, the City of Sandy will strive to provide a formal performance review on an annual basis.

Reviews will generally include the following:

- An evaluation of the employee's quality and quantity of work;
- A review of exceptional employee accomplishments;
- Establishment of goals for career development and job enrichment;
- A review of areas needing improvement; and
- Setting of performance goals for the employee for the following year.

Employees who disagree with a performance evaluation may submit a written response with reasons for disagreement. The employee's response shall be filed with the employee's performance evaluation in the employee's personnel file. Such a response must be filed no later than 30 days following the date the performance evaluation was received.

Supervisors and managers are encouraged to provide employees with informal evaluations of their employees' work on an as-needed basis.

#### *S. Reimbursement Pay for Public Works Education*

Examinations must be taken during regular work hours and employees will be paid straight time for the examination and travel to and from the examination site. Employees using a personal vehicle to travel to and from the examination site may apply for mileage reimbursement per the City's standard policy.

The City of Sandy will pay application and examination fees for eligible employees with the following exceptions: The City of Sandy will pay for one application and examination fee and one certification preparatory class per employee per program (water, wastewater). After two failed attempts the City of Sandy will pay for the examination fee but will not pay for further preparatory classes. If the employee does not pass the exam(s) any additional attempts to apply for certification preparatory classes in the same calendar year or after two failed attempts will be at the employee's expense.

The City of Sandy will continue to pay certification renewal fees and relevant, required continuing education in order to maintain certification for employees.

*T. Certification Pay for Police Sergeants*

Supervisory Certificate

A supervisory certificate is a mandatory requirement of the Sergeant position and must be obtained within 24 months from hire date. Certification pay is equal to 4% of base pay.

**III. Time Off and Leaves of Absence**

*A. Attendance, Punctuality, and Reporting Absences*

Employees are expected to report to work as scheduled, on time and be prepared to start work. Employees are also expected to remain at work for their entire work schedule, except for unpaid break periods or when required to leave on authorized City of Sandy business, and perform the work assigned to or requested of them. Late arrivals, early departures, or other absences from scheduled hours are disruptive and must be avoided.

Unless specified otherwise in a policy below, employees who will be unexpectedly absent from work for any reason or who will not show up for work on time must inform their supervisor via a telephone call or email no later than one hour before the start of the employee's shift/workday. Not reporting to work and not calling to report the absence is a no-call/no-show and is a serious matter. The first instance of a no call/no show will result in a final written warning. The second separate offense may result in termination of employment with no additional disciplinary steps. A no call/no show lasting three days may be considered job abandonment and may be deemed an employee's voluntary resignation of employment.

*B. Vacation*

All Regular, full-time employees accrue vacation leave monthly. The amount of vacation to which an employee becomes entitled to is determined by the employee's length of service from their hire date. For Regular, full-time employees, vacation accrues as follows:

<b>Length of Service (years)</b>	<b>Accrual</b>
1 <sup>st</sup> - 3 <sup>rd</sup> year (0 - 36 months)	88 per year / 7.33 per month
3 <sup>rd</sup> - 5 <sup>th</sup> year (37 - 60 months)	108 per year / 9.00 per month
5 <sup>th</sup> - 10 <sup>th</sup> year (61 - 120 months)	128 per year / 10.67 per month
10 <sup>th</sup> - 15 <sup>th</sup> year (121 - 180 months)	168 per year / 14.00 per month
15 <sup>th</sup> year (181 -192 months)	176 per year / 14.66 per month
16 <sup>th</sup> year (193 - 204 months)	184 per year / 15.33 per month
17 <sup>th</sup> year (205 - 216 months)	192 per year / 16.00 per month
18 <sup>th</sup> year (217 - 228 months)	200 per year / 16.66 per month
19 <sup>th</sup> year (229 - 240 months)	208 per year / 17.33 per month

20 <sup>th</sup> year (241 - 252 months)	216 per year / 18.00 per month
21 <sup>st</sup> year (253 - 264 months)	224 per year / 18.66 per month
22 <sup>nd</sup> year (265 - 276 months)	232 per year / 19.33 per month
23 <sup>rd</sup> year (277 months; maximum accrual)	240 per year / 20.00 per month

**Note: Employee must complete full month of service to get to the next accrual.**

The maximum annual accrual of vacation leave is not to exceed 240 hours (six weeks).

Regular, part-time employees accrue vacation monthly in the proportion that their normally scheduled number of hours bears to 40 per week. For example, a regular, part-time employee who usually works 20 hours per week would earn 44 hours of vacation during his or her first year of service.

Department Directors and the City Manager will accrue an additional 40 hours of vacation leave annually; the maximum annual accrual of vacation leave is not to exceed 280 hours (seven weeks).

Vacation may not be taken until it is earned. Vacation leave is not to be banked and then never used. Therefore, the total vacation accrual cannot exceed a maximum of 320 hours (eight weeks). Once this limit is reached, vacation leave will no longer accrue, until the balance is brought below the maximum.

Employees may sell back to City of Sandy up to 80 hours of accrued vacation annually, limited to the following conditions:

- A minimum of a like number of vacation hours are being taken as vacation within two weeks, and
- Vacation sell backs shall only occur once during any fiscal year, and
- City of Sandy shall receive two weeks' prior written notice from any employee requesting a vacation buy back; and
- The vacation buy back will be processed via the normal payroll process.

Employees who terminate employment during their probationary period shall not be entitled to pay out of their accrued vacation leave. Employees who have successfully completed their probationary period, gained Regular employment status, and separated from service in good standing (meaning not terminated for violation of City of Sandy policies, procedures, or performance issues) shall be entitled to payment of all accrued vacation leave. In the case of death of an employee, compensation shall be paid to the beneficiary in the same manner that salary due to the decedent is paid.

### *C. Sick Leave*

City of Sandy provides eligible employees with sick leave as required by Oregon's Paid Sick Leave Law. The City of Sandy's policy is more generous than the law requires. This policy will be updated as necessary to reflect changes in and to ensure compliance with Oregon law.

Employees with questions about this policy may contact the HR Director. Please also refer to the Oregon Sick Leave Law poster that is posted at City Hall.

### Eligibility and Accrual of Paid Sick Leave

Under Oregon's Paid Sick Leave Law and this policy, "employee" includes full-time, part-time, hourly, salaried, exempt and nonexempt employees. Sick leave runs concurrently with Oregon Family Medical Leave, and other leave where allowed by law.

Employees begin to accrue paid sick leave on the first day of employment but may not use paid sick leave until the 31st day of employment. After the 31st day of employment, paid sick leave may be used as it is accrued.

Full-time, exempt employees will accrue sick leave at a rate of 10 hours per pay period (prorated for any partial month worked); Non-exempt employees will accrue at the rate of 2.31 hours for every 40 hours worked. For purposes of calculating sick leave accruals, hours worked include regular, vacation, sick, overtime, comp time (when used, not earned), and worker's compensation leave. Paid sick leave shall be taken in hourly increments. Total sick leave accumulation shall not exceed 1,500 hours. Once the limit is reached, sick leave will no longer accrue until the balance is brought below the maximum.

### Pay Rate and Carryover

Paid sick leave will be paid at the employee's regular rate of pay. Exempt employees are presumed to work 40 hours in each workweek for purposes of their sick leave accrual unless their normal workweek is less than 40 hours, in which case sick leave is accrued based on the employee's normal workweek. Generally, sick leave pay will be included in the paycheck for the payroll period after sick leave is used, provided the employee submits adequate documentation verifying that the absence was for a qualifying reason as defined in the "Use of Sick Leave" section below.

Sick leave is meant to be used or carried over; any unused sick leave will not be cashed out upon separation from employment. If an employee leaves employment and is rehired within 90 days, the employee's sick leave balance will be restored. Unused sick leave is reported to PERS upon an employee's separation.

### Use of Sick Leave

Accrued paid sick leave may be used for the following reasons:

- For the diagnosis, care, or treatment of a mental or physical illness, injury or health condition or need for preventive medical care. This is available for the employee or his/her covered family member.
  - "Family member" means the eligible employee's spouse, same-gender domestic partner (as described in ORS106.300 to 106.340), biological child, adopted child, stepchild, foster child; same-gender domestic partner's child, parent, adoptive parent, stepparent, foster parent, parent-in-law; same-gender domestic partner's parent, grandparent, grandchild; and any individual with whom the employee has or had a loco parentis relationship.
- For any purpose allowed under the Oregon Family Leave Act, including bereavement leave.

- If the employee, or the employee's minor child or dependent, is a victim of domestic violence, harassment, sexual assault or stalking as defined by Oregon law and requires leave for any of the purposes under Oregon's domestic violence leave law (ORS 659A.272).
- In the event of certain public health emergencies or other reasons specified under Oregon's sick leave law.

Employees absent from work for a qualifying reason must use accrued sick time hours for that reason and on each subsequent day of absence.

Employee Notice of Need for Sick Leave

*Foreseeable Sick Leave.* If the need for sick leave is foreseeable, an employee must notify their supervisor as soon as practicable before the leave using the City of Sandy's notification procedures. Generally, an employee must provide at least 10 days' notice for foreseeable sick leave. The request shall include the anticipated duration of the sick leave, if possible. Employees must make a reasonable effort to schedule foreseeable sick time in a manner that minimally disrupts the operations of the City of Sandy. Employees must notify their supervisor of any change in the expected duration of sick leave as soon as is practicable.

*Unforeseeable Sick Leave:* If the need for sick leave is unforeseeable, the employee must notify their supervisor as soon as practicable and comply generally with City of Sandy's notification procedures. Generally, an employee should notify his/her immediate supervisor of unforeseeable sick leave at least one hour prior to the beginning of his/her shift, unless physically unable to do so, at which time notice should be given as soon as possible.

An employee must contact his/her supervisor daily while on sick leave, unless an extended period of sick leave has been prearranged with the supervisor or when off work on protected leave. The employee shall inform his/her supervisor of any change in the duration of sick leave as soon as practicable.

If an employee fails to provide proper notice or make a reasonable effort to schedule leave in a manner that is only minimally disruptive to the organization and operations, City of Sandy may deny the use and legal protections of sick leave.

Sick Leave Documentation

If an employee takes more than three consecutive scheduled workdays as sick leave, City of Sandy may require reasonable documentation showing that the employee was absent for an approved reason. Reasonable documentation includes documentation signed by a healthcare provider, or documentation for victims of domestic violence, harassment, sexual assault, or stalking.

Sick Leave Abuse

If City of Sandy suspects sick leave abuse, including but not limited to repeated use of unscheduled sick leave or repeated use of sick leave adjacent to weekends, holidays, vacations and paydays, City of Sandy may require documentation from a healthcare provider on a more frequent basis. Employees found to have abused sick leave as described here may also be subject to discipline, up to and including termination.



#### *D. Leave Donations*

An employee may donate sick, vacation, and/or compensatory time to another employee who has exhausted all available earned leave (sick leave, vacation leave and compensatory time, etc.) before using any donated leave. The employee must be in documented need of sick leave and meets the eligibility requirement of FMLA/OFLA. The sick, vacation, and/or compensatory time will be valued at the donating employee's current rate of pay, and then converted to the appropriate amount of leave based on the recipients' rate of pay. Donated hours shall not be processed in an amount greater than that which is approximately necessary to cover the employee's next occurring pay period. Donors must complete and sign the Sick Leave Donation form and turn into the HR department.

During a qualifying leave event, requests for donations may only be made once. The request shall be in writing to the HR Director, who will notify City of Sandy employees of the request and provide a specific time period for which donations may occur. Donations will be processed in the order that they are received. No employee shall receive more than twelve weeks of donated leave in any rolling twelve-month period. Employees may not donate more than 80 hours or fifty percent (50%) of their current sick leave balance, whichever is less. Employees cannot borrow against future accruals to donate. Employees who are currently on approved leave cannot donate time to another employee.

If an employee is otherwise eligible for paid health benefits, the employee will continue to receive those benefits while receiving donated leave.

#### *E. Holidays*

##### Holidays

The City of Sandy recognizes eleven holidays each year. All regular, full-time employees will receive eight hours of straight-time compensation for each holiday. Regular, part-time employees receive pay for each designated holiday in the proportion that their normally scheduled number of hours equals 40 hours per week. The holidays celebrated are:

- New Year's Day
- Martin Luther King, Jr. Day
- Presidents' Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day
- Day After Thanksgiving
- Christmas Day

A holiday that falls on a weekend will be observed on either the preceding Friday or the following Monday to coincide with local custom.

The City Manager has the discretion to authorize additional office closures based on operational needs.

To be eligible for holiday pay, an employee must have worked his or her regularly scheduled hours the workday before and the workday after the holiday or have been on an approved vacation day or any other excused absence under City of Sandy policy. If an employee is on vacation when a holiday is observed, the employee will be paid for the holiday and will be granted an alternate day of vacation at a later date.

Any hourly, non-exempt employee required to work on a holiday will receive overtime pay for the hours worked, in addition to their regularly entitled holiday compensation.

#### *F. Family Medical Leave*

##### **FMLA/OFLA Policy**

The following is a summary of Family and Medical Leave policy and procedures under the federal Family Medical Leave Act (FMLA) and the Oregon Family Leave Act (OFLA). Generally, and as will be discussed, eligible employees are entitled to 12 weeks of unpaid leave for the reasons identified below. Federal and state law prohibit retaliation against an employee with respect to hiring or any other term or condition of employment because the employee asked about, requested, or used Family and Medical Leave. In all cases, applicable Oregon and federal laws, rules, policies, and collective bargaining agreements govern the employee's and the City of Sandy's rights and obligations, not this policy.

Employees seeking further information should contact the HR Director. Please also refer to the "Employee Rights and Responsibilities Under the Family Medical Leave Act" and "Oregon Family Leave Act" notices posted in each City building, which are incorporated here by reference.

##### **Definitions**

###### *Child/Son or Daughter*

For purposes of OFLA, "child" includes a biological, adopted, foster or stepchild, the child of a registered same-sex domestic partner or a child with whom the employee is in a relationship of *in loco parentis*. For purposes of OFLA Serious Health Condition Leave, the "child" can be any age; for all other types of leave under OFLA, the "child" must be under the age of 18 or over 18 if incapable of self-care.

A "son or daughter" is defined by FMLA as a biological, adopted, or foster child, a stepchild, a legal ward, or a child of a person standing *in loco parentis* who is either under 18 years of age or is 18 years of age or older and "incapable of self-care because of a mental or physical disability" at the time FMLA leave is to commence. FMLA also provides separate definitions of "son or daughter" for FMLA military family leave that are not restricted by age — see below.

###### *Eligible Employee*

OFLA – To qualify for OFLA leave for a Serious Health Condition or Sick Child Leave, an employee must have been employed for at least 180 days and worked an average of at least 25 hours per

week. To qualify for Parental Leave under OFLA, an employee must have been employed for at least 180 days (no per-week hourly minimum is required).

OMFLA — For purposes of Oregon Military Family Leave Act leave, the employee need have only worked 20 hours per week (no minimum length of employment required). A different calculation method applies for reemployed service members under USERRA who seek OMFLA leave; see the HR Director for more information.

FMLA — Employees are eligible for FMLA leave if they have worked for a covered employer for at least one year (which may be based on separate stints of employment) and for 1,250 hours during the 12 months preceding the date leave is to begin. They must also be employed at a worksite where 50 or more employees are employed by the employer within 75 miles of that worksite.

Public Health Emergency Leave – Employees are eligible to take any OFLA leave during a Public Health Emergency if they have worked: (a) more than 30 days immediately before the date on which the leave would begin; or (b) an average of 25 hours per week in the 30 days immediately before the date on which the leave would begin. This is available to employees who are eligible for OFLA only. See the definition of “public health emergency” below.

Leave under Oregon and federal law will run concurrently when permitted.

#### *Family Medical Leave*

This includes all the types of leave identified in the section below, entitled “Reasons for Taking Leave,” unless otherwise specified.

#### *Family Member*

- For purposes of FMLA, “family member” is defined as a spouse, parent or a “son” or “daughter” (defined above).
- For purposes of OFLA, “family member” includes the definitions found under FMLA and also includes adult children (for “serious health condition” leave only), a parent-in-law, grandparent, grandchild, registered same-sex domestic partner, and parent or child of a registered same-sex domestic partner.

#### *Serious Health Condition*

“Serious health condition” is defined under FMLA and OFLA as an illness, injury, impairment, or physical or mental condition that involves either an overnight stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents the employee from performing the functions of the employee’s job or prevents the qualified family member from participating in school or other daily activities. Under OFLA only, “serious health condition” includes any period of absence for the donation of a body part, organ, or tissue, including preoperative or diagnostic services, surgery, post-operative treatment, and recovery.

Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than three consecutive calendar days combined with at least two visits to a health care provider or one visit and a regimen of continuing treatment, or incapacity due to pregnancy, or incapacity due to a chronic condition.

Other conditions may meet the definition of a “serious health condition;” see HR Director for more information. The common cold, flu, earaches, upset stomach, minor ulcers, headaches other than migraine, routine dental or orthodontia problems, periodontal disease, and cosmetic treatments (without complications), are examples of conditions that are not generally defined as serious health conditions.

#### *Public Health Emergency*

For purposes of OFLA only, a “public health emergency” is a public health emergency declared under ORS 433.441 or an emergency declaration declared under ORS 401.165. Examples of this include when the State of Oregon declared a COVID-19 state of emergency in March 2020 and the wildfire state of emergency in June 2021.

#### Reasons for Taking Leave

Family Medical Leave may be taken under any of the following circumstances:

1. Call to Active-Duty Leave: Eligible employees with a spouse, son, daughter or parent on active duty or call to active duty status in the regular Armed Forces, National Guard or Reserves in support of a contingency operation may use their 12-week leave entitlement to address certain “qualifying exigencies.” “Qualifying exigencies” may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions, and attending post-deployment reintegration briefings. This type of leave is available under FMLA only; however, under OFLA, specifically under the Oregon Military Family Leave Act, during a period of military conflict, as defined by the statute, eligible employees with a spouse or registered same-sex domestic partner who is a member of the Armed Forces, National Guard, or military reserve forces of the U.S. and who has been notified of an impending call or order to active duty, or who has been deployed, is entitled to a total of 14 days of unpaid leave per deployment after the military spouse or registered same-sex domestic partner has been notified of an impending call or order to active duty and before deployment and when the military person is on leave from deployment.
2. Employee’s Serious Health Condition Leave: To recover from or seek treatment for an employee’s serious health condition, including pregnancy-related conditions and prenatal care.
3. Family Member’s Serious Health Condition Leave: To care for a family member with a serious health condition.
4. Parental Leave: For the birth of a child or for the placement of a child under 18 years of age for adoption or foster care. Parental leave must be completed within 12 months of the birth of a newborn or placement of an adopted or foster child.
5. Pregnancy Disability Leave: For incapacity due to pregnancy, prenatal medical care or birth.
6. Servicemember Family Leave: Eligible employees may take up to 26 weeks of leave to care for a “covered servicemember” during a single 12-month period. A “covered servicemember” is a current member of the Armed Forces, including a member of the National Guard or Reserves, who has a serious injury or illness incurred in the line of duty on active duty that may render the servicemember medically unfit to perform his/her duties

for which the servicemember is undergoing medical treatment, recuperation, or therapy; or is in outpatient status; or is on the temporary disability retired list. Under some circumstances, a veteran will be considered a “covered servicemember.” This type of leave is available under FMLA only.

7. Sick Child Leave: To care for a child who suffers from an illness or injury that does not qualify as a serious health condition but that requires home care. This type of leave does not provide for routine medical and dental appointments or issues surrounding the availability of childcare when the child is not ill or injured. Sick child leave is not available if another family member is able and willing to care for the child. This type of leave is available only to employees who are eligible under OFLA.
8. Bereavement Leave. This type of leave is addressed under OFLA; see the Bereavement Leave Policy for more information.

#### Length of Leave

In any One-Year Calculation Period, eligible employees may take:

1. Up to 12 weeks of Parental Leave, Serious Health Condition Leave (employee’s own or family member), Sick Child Leave, or Call to Active Duty Leave;
2. An additional 12) weeks of leave may be available to an eligible employee for an illness, injury or condition related to pregnancy or childbirth that disables the employee; and
3. Employees who take the entire 12 weeks of OFLA Parental Leave may be entitled to an additional 12 weeks of Sick Child Leave.

When leave is taken for Servicemember Family Leave, an eligible employee may take up to 26 weeks of leave during the One-Year Calculation Period to care for the servicemember. During the One-Year Calculation Period in which Servicemember Family Leave is taken, an eligible employee is entitled to a combined total of 26 weeks of FMLA Leave (some of which may include other types of FMLA-specific leaves of absence).

#### One-Year Calculation Period

The “12-month period” during which leave is available (also referred to as the “One-Year Calculation Period”) will be determined by a rolling 12-month period measured backward from the date an employee uses any Family Medical Leave. Each time an employee takes Family Medical Leave, the remaining leave entitlement would be any balance of the 12 weeks which has not been used during the immediately preceding 12 months.

#### Intermittent Leave

Intermittent or reduced schedule leave may be taken during a period of Family Member or Employee Serious Health Condition Leave or Servicemember Family Leave. Additionally, Call to Active Duty Leave may be taken on an intermittent or reduced leave schedule basis. An employee may be temporarily reassigned to a position that better accommodates an intermittent or reduced schedule; employees covered by OFLA will not be reassigned without his/her expressed consent and agreement. Employees must make reasonable efforts to schedule planned medical treatments to minimize disruption of City of Sandy operations, including consulting management prior to the scheduling of treatment in order to work out a treatment schedule which best suits

the needs of both City of Sandy and the employee. Intermittent leave for Parental Leave is not available.

#### Employee Responsibilities — Notice

Employees must provide at least 30 days' notice before Family Medical Leave is to begin if the reason for leave is foreseeable based on an expected birth, placement for adoption or foster care, planned medical treatment for a serious health condition of the employee or of a family member, or the planned treatment for a serious injury or illness of a covered servicemember (Servicemember Family Leave). If 30 days' notice is not practicable, because of a lack of knowledge of approximately when leave will be required to begin, a change in circumstances, or a medical emergency, notice must be given as soon as practicable. If the situation giving rise to a Sick Child Leave is unforeseeable, an employee must give verbal or written notice to City of Sandy within 24 hours of commencement of the leave.

For Call to Active Duty Leave, notice must be provided as soon as practicable, regardless of how far in advance such leave is foreseeable.

Whether leave is to be continuous or is to be taken intermittently or on a reduced schedule basis, notice need only be given one time, but the employee must let the HR Director know as soon as practicable if dates of scheduled leave change or are extended, or were initially unknown.

If circumstances change during the leave and the leave period differs from the original request, the employee must notify the HR Director within three business days, or as soon as possible. Further, employees must provide written notice within three days of returning to work.

Regardless of the reason for leave, or whether the need for leave is foreseeable, employees will be expected to comply with City of Sandy's normal call-in procedures. Employees who fail to comply with City of Sandy's leave procedures may be denied leave, subject to discipline, or the start date of the employee's Family Medical Leave may be delayed.

#### Certification

Generally speaking, employees must provide sufficient information for City of Sandy to determine if the leave may qualify for FMLA or OFLA protection and the anticipated timing and duration of the leave. Sufficient information may include that the employee is unable to perform job functions, the family member is unable to perform daily activities, the need for hospitalization or continuing treatment by a health care provider, or circumstances supporting the need for either Call to Active Duty or Servicemember Family Leave.

Employees also must inform the City of Sandy if the requested leave is for a reason for which FMLA leave was previously taken or certified. Additionally:

1. Employees requesting serious health condition leave for themselves or to care for a covered family member will be required to provide certification from the health care provider of the employee or the covered family member to support the request.
2. Employees requesting sick child leave under OFLA may be required to submit, at a minimum, a note from a doctor if the employee has requested to use more than three days (i.e., one three-day occurrence or three separate instances) of sick child leave within a one-year period.

Employees must furnish City of Sandy's requested medical certification information within 15 calendar days after such information is requested by City of Sandy. In some cases (except for leave to care for a sick child), City of Sandy may require a second or third opinion, at City of Sandy's expense. Employees also may be required to submit subsequent medical verification.

Employees will not be asked for, and they should not provide, any genetic information about themselves or a family member in connection with a FMLA/OFLA medical certification.

#### Medical Certification Prior to Returning to Work

If Family Medical Leave is for the employee's own serious health condition, the employee must furnish, prior to returning to work, medical certification from his/her health care provider stating that the employee is able to resume work.

#### Substitution of Paid Leave for Unpaid Leave

Employees are required to use accrued paid leave, including, vacation, compensatory time, and sick leave prior to a period of unpaid leave of absence on Family Medical Leave. Use of accrued paid leaves will run concurrently with Family Medical Leave. If the employee has no accrued paid leave, vacation, compensatory time, or sick leave available to use during a Family Medical Leave, the leave will be unpaid.

#### Holiday Pay While on Leave

Employees receiving short or long-term disability will not qualify for holiday pay. Employees using vacation pay or sick pay during a portion of approved Family Medical Leave in which a holiday occurs will qualify to receive holiday pay. Employees who are on unpaid leave during a holiday will not qualify to receive holiday pay.

#### On-the-Job Injury or Illness

Periods of employee disability resulting from a compensable on-the-job injury or illness will qualify for FMLA Leave if the injury or illness is a "serious health condition" as defined by applicable law.

OFLA leave will not be reduced by and will not run concurrently with any period the employee is unable to work because of a disabling compensable on-the-job injury; however, if the injury or illness is a "serious health condition" as defined by Oregon law and the employee has refused a bona fide offer of light-duty or modified employment, OFLA leave will commence.

If the employee's serious health condition is the result of an on-the-job injury or illness, the employee may qualify for workers' compensation time-loss benefits.

#### Benefits While on Leave

If an employee is on approved FMLA or OFLA Leave, City of Sandy will continue the employee's health coverage under any "group health plan" on the same terms as if the employee had continued to work. An employee wishing to maintain health insurance during a period of approved FMLA or OFLA leave will be responsible for bearing the cost of his/her share of group health plan premiums which had been paid by the employee prior to the FMLA or OFLA leave. Employees on a non-paid leave status will not accrue vacation, sick leave, or other benefits (other

than health insurance) while the employee is on a non-paid- FMLA or OFLA leave. The leave period, however, will be treated as continuous service (i.e., no break in service) for purposes of vesting and eligibility to participate in City of Sandy benefit plans.

#### Job Protection

Employees returning to work from Family Medical Leave will be reinstated to their former position. If the position has been eliminated, the employee may be reassigned to an available equivalent position. Reinstatement is not guaranteed if the position has been eliminated under circumstances where the law does not require reinstatement.

Employees are expected to promptly return to work when the circumstances requiring Family Medical Leave have been resolved, even if leave was originally approved for a longer period. If an employee does not return to work at the end of a designated Family Medical Leave period, reinstatement may not be available unless the law requires otherwise.

The use of Family Medical Leave cannot result in the loss of any employment benefit that accrued prior to the start of an employee's leave.

Employees who work for other employers during a "serious health condition" leave may be subject to discipline up to and including termination. Additionally, all employees who use Family Medical Leave for reasons other than the reason for which leave had been granted may be subject to discipline up to and including termination.

#### *G. Bereavement Leave*

Employees who qualify for OFLA may take up to two weeks of unpaid bereavement leave per death of a Family Member (defined below). Employees who have worked for City of Sandy for more than 30 days may use up to 40 hours of accrued sick leave for bereavement purposes, and who have experienced the death of a Family Member (defined below). Employees who have worked for City of Sandy for fewer than 30 days or less may not be eligible for leave; see the HR Director for more information.

Bereavement leave may be used to attend the funeral or alternative to a funeral of the family member, to make arrangements necessitated by the death of the family member, or to grieve the death of the family member. The two weeks of bereavement leave must be taken in the 60-day period following notice of death of a family member and will be deducted from the employee's available leave time under OFLA. For purposes of this policy, "Family Member" is defined to include the employee's spouse, same-sex domestic partner (registered), child, parent, parent-in-law, grandparent, or grandchild, or the same relations of an employee's same-sex domestic partner (registered) or spouse.

Employees who wish to take bereavement leave must inform City of Sandy as soon as possible after receiving notification of a Family Member's death. Although prior notice is not required, verbal notice must be provided within 24 hours of beginning leave. Written notice must be provided to the City of Sandy within three days of returning to work. Employees are required to use any available sick leave during the period of bereavement leave; vacation time will be used if the employee has no available sick leave.



## *H. Jury and Witness Duty*

### Jury Duty

The City of Sandy will grant employees time off for mandatory jury duty and/or jury duty orientation. A copy of the court notice must be submitted to the employee's manager to verify the need for such leave. If an employee is called for jury duty, the employee should be granted leave with pay. Compensation received (except travel reimbursement) shall be remitted to the City. In cases where the compensation does not clearly distinguish the amount for travel, the employee may deduct mileage at the current IRS mileage rate.

The employee is expected to report for work when doing so does not conflict with court obligations. It is the employee's responsibility to keep his or her supervisor or manager informed about the amount of time required for jury duty.

### Witness Duty

Time spent serving as a witness in a work-related, legal proceeding will be treated as time worked for pay purposes, provided the time served occurs during regularly scheduled hours, the employee is subpoenaed to testify, and the employee submits witness fees to the City of Sandy upon receipt.

Except for employee absences covered under City of Sandy's "Crime Victim Leave Policy" or "Domestic Violence Leave and Accommodation Policy," employees who are subpoenaed to testify in non-work-related legal proceedings must use any available vacation time to cover their absence from work. If the employee does not have any available vacation time, the leave will be taken without pay. Employees must present a copy of the subpoena served on them to their supervisor for scheduling and verification purposes no later than 24 hours after being served.

## *I. Religious Observances Leave and Accommodation Policy*

The City of Sandy respects the sincerely held religious beliefs and observances of all employees. The City of Sandy will make, upon request, an accommodation for such observances when a reasonable accommodation is available that does not create an undue hardship on City of Sandy's business. Employees may use vacation or unpaid time for religious holy days or to participate in a religious observance or practice; if accrued leave is not available, then an employee may request to take unpaid leave. Requests for religious leave or accommodation should be made with the HR Director.

## *J. Crime Victim Leave Policy*

Any employee who has worked an average of at least 25 hours per week for 180 days is eligible for reasonable, unpaid leave to attend criminal proceedings if the employee or his or her immediate family member (defined below) has suffered financial, social, psychological, or physical harm as a result of being a victim of certain felonies, such as kidnapping, rape, arson, and assault.

"Immediate family member" includes a spouse, registered same-sex domestic partner, father, mother, sibling, child, stepchild, or grandparent.

Employees who are eligible for crime victim leave must:

- Use any accrued, but unused vacation/sick leave during the leave period;
- Provide as much advance notice as is practicable of his/her intention to take leave (unless giving advance notice is not feasible); and
- Submit a request for the leave in writing to the HR Director as far in advance as possible, indicating the amount of time needed, when the time will be needed, and the reason for the leave.

In all circumstances, City of Sandy may require certification of the need for leave, such as copies of any notices of scheduled criminal proceedings that the employee receives from a law enforcement agency or district attorney's office, police report, a protective order issued by a court, or similarly reliable sources.

#### *K. Domestic Violence Leave and Accommodation Policy*

All employees are eligible for reasonable unpaid leave to address domestic violence, harassment, sexual assault, or stalking of the employee or his or her minor dependents.

Reasons for taking leave include the employee's (or the employee's dependent's) need to: seek legal or law enforcement assistance or remedies; secure medical treatment for or time off to recover from injuries; seek counseling from a licensed mental health professional; obtain services from a victim services provider; or relocate or secure an existing home.

Leave is generally unpaid, but the employee may use any accrued vacation or sick leave while on this type of leave.

When seeking this type of leave, the employee should provide as much advance notice as is practicable of his or her intention to take leave, unless giving advance notice is not feasible.

Notice of need to take leave should be provided by submitting a request for leave in writing to the HR Director as far in advance as possible, indicating the time needed, when the time will be needed, and the reason for the leave. City of Sandy will then generally require certification of the need for the leave, such as a police report, protective order or other evidence of a court proceeding, or documentation from a law enforcement officer, attorney, healthcare professional, member of the clergy, or victim services provider.

If more leave than originally authorized needs to be taken, the employee should give the City of Sandy notice as soon as is practicable prior to the end of the authorized leave. When taking leave in an unanticipated or emergency situation, the employee must give oral or written notice as soon as is practicable. When leave is unanticipated, this notice may be given by any person on the employee's behalf.

Finally, employees who are victims of domestic violence, harassment, sexual assault, or stalking may be entitled to a "reasonable safety accommodation" that will allow the employee to more safely continue to work, unless such an accommodation would impose an "undue hardship" on City of Sandy. Please contact the HR Director immediately with requests for reasonable safety accommodations.

#### *L. Military Leave*

Employees who wish to serve in the military and take military leave should contact the HR Director for information about their rights before and after such leave. You are entitled to reinstatement upon completion of military service, provided you return or apply for reinstatement within the time allowed by law.

Further, eligible employees called for initial active duty for training and for all periods of annual active duty for training as a member of the National Guard, National Guard Reserve or of any reserve component of the Armed Forces of the United States or of the United States Public Health Service, may be entitled to leave with pay for all regular workdays that fall within a period not to exceed 15 calendar days in any federal training year. Weekend drill obligations are not considered "federal active duty" for training under this policy; other requirements apply. Please contact the HR Director for more information and to make arrangements for this paid leave.

#### *M. Other Leave*

Other types of leave without pay will be considered on an individual basis by the City Manager and HR Director, keeping in mind the individual department and overall City of Sandy's operational needs.

### **IV. Employee Benefits**

#### *A. Insurance Benefits*

Employees who meet the definition of "benefit eligible" under both City of Sandy policy and that of its health insurance provider are entitled to the benefit options offered by City of Sandy. These benefits include medical, dental, and vision coverage in a cost share program. Additional information may be obtained through the HR Director. The City of Sandy will pay its share of health insurance costs to all employees who terminate employment in good standing; for three months after 10 years of service, and six months after 15 years of service.

City of Sandy will provide regular, full-time employees with \$100,000 of term life insurance coverage, as well as \$100,000 of accidental death and dismemberment coverage. These plans are paid for by the City of Sandy in full. Additional life insurance coverage may be purchased at the expense of the employee.

The group insurance policy and the summary plan description issued to employees set out the terms and conditions of the health insurance plan offered by City of Sandy. These documents govern all issues relating to employee health insurance. As other employee benefits are offered by the City of Sandy, employees will be advised and provided with copies of relevant plan documents. Copies are available from the HR Director.

Additional insurance benefits and programs are offered to employees, including flexible spending account (FSA) and supplemental insurance. These offerings are at the employee's option. Any additional premium expense is the responsibility of the employee.

### *B. Employee Assistance Program (EAP)*

This free, confidential service is provided to all employees and their covered dependents who may be experiencing life problems. Information regarding this service can be obtained by contacting the HR Director.

### *C. Workers' Compensation and Safety on the Job*

You are protected by workers' compensation insurance under Oregon law. This insurance covers you in case of occupational injury or illness by providing, among other things, medical care, compensation, and temporary or other disability benefits. Employees are expected to work safely and in a safe environment.

#### Steps to Take if You Are Injured on the Job

To ensure that you receive any workers' compensation benefits to which you may be entitled, you must do all the following:

1. Immediately report any work-related injury to your supervisor. You must report the injury at the time it happens, and no later than 24 hours after injury;
2. If an emergency, seek medical treatment first and then do the following. Call the Rapid Care Hotline to report your injury. They will assist in completing the required 801 form and assist with any further medical steps; and
3. Promptly complete an Incident Report and return it to the HR Director.

*Failure to timely follow these steps may negatively affect your ability to receive benefits.*

#### Return to Work

If you require workers' compensation leave, you will – under most circumstances – be reinstated to the same position that you held at the time your leave began, or to an equivalent position, if available. However, you must first submit documentation from a health care provider who is familiar with your condition certifying your ability to return to work and perform the essential functions of your position.

When returning from a workers' compensation leave you have no greater right to reinstatement than if you had been continuously employed rather than on leave. For example, if you would have been laid off had you not been on leave, or if your position is eliminated, and no equivalent or comparable positions are available, then you may not be entitled to reinstatement. These are only examples, and all reinstatement/reemployment decisions are subject to the terms of any applicable collective bargaining agreement. The City of Sandy does not discriminate against employees who suffer a workplace injury or illness.

#### Early Return-to-Work Program

Our Return-to-Work program provides guidelines for returning you to work at the earliest possible time after you have suffered an on-the-job injury or illness that results in time loss. This program is not intended as a substitute for reasonable accommodation when an injured employee also qualifies as an individual with a disability. The Return-to-Work Program is

intended to be transitional work, to enable you to return to your regular job in a reasonable period of time.

The Return-to-Work program for job-related injuries consists of a team effort by the City of Sandy, injured employees and their treating physicians, and our workers' compensation insurance carrier claims staff. The goal is to return our employees to full employment at the earliest possible date that is consistent with their medical condition and the advice of the treating physician.

If your doctor determines that you are able to perform modified work, City of Sandy will attempt to provide you with a temporary job assignment for a reasonable period of time until you can resume your regular duties (except where provided as an accommodation for a disability). If, due to a work-related injury, you are offered a modified position that has been medically approved, failure to phone in or report at the designated time and place may affect your compensation and employment with the City of Sandy. While you are on modified or transitional work, you are still subject to all other City of Sandy rules and procedures.

#### Salary Continuation

City of Sandy adopts a policy of providing salary continuation in place of temporary disability for employees who are off work as a result of a compensable workers' compensation claim. Salary continuation will be at the same wage with normal deductions withheld (i.e. taxes, medical, and other voluntary deductions) and same pay interval as the employee received at the time of injury. Additional information regarding this program can be received from the HR Director.

#### Overlap with Other Laws

The City of Sandy will account for other leave and disability laws that might also apply to your situation, such as the Americans with Disabilities Act (ADA) and FMLA or OFLA. If, after returning from a workers' compensation leave, it is determined that you are unable to perform the essential functions of your position because of a qualifying disability, you may be entitled to reasonable accommodation, as governed by the ADA and/or applicable Oregon laws covering disabilities in the workplace.

#### *D. Fringe Benefits and Additional Compensation*

ORS 244.040 prohibits a public official or a relative or member of the household of the public official from obtaining financial gain or avoidance of financial detriment, if that gain would not otherwise be available but for the public official's holding of the official position or office, except where the gift is part of an official compensation package, as determined by the public body that the public official serves.

Employees of City of Sandy receive certain and de minimis fringe benefits that are not available to the general public. The City of Sandy recognizes these benefits as part of the employee's official compensation package for the purposes of ORS 244.040. These fringe benefits include:

- Occasional, de minimis and infrequent use of City equipment and supplies such as pens, paper, office supplies, telephones, cell phones, copying machines, computers, tablets,

software and email systems in a manner consistent with the applicable use policies for such City equipment;

- Employees who use personal credit cards and are reimbursed by the City in a manner consistent with applicable City policies may accept any benefits earned from using a personal credit card that offers incentives such as cash rebates or frequent flyer miles based upon the dollar amount of purchases provided that the value of the benefits earned does not exceed fifty dollars in any calendar year;
- Computers, tablets, or other electronic equipment sold at cost to SandyNet employees, provided that such equipment is no longer of use to City of Sandy as determined by the IT Director;
- A fitness membership reimbursement (taxable benefit) is available monthly to all active employees in the City of Sandy. This includes on-line streaming program subscriptions, for example, Peloton or Apple Fitness Plus. This applies to only one program. Contact Human Resources for details about the program;
- A clothing allowance is available for certain positions. Talk to your manager directly to see if you qualify; and
- Occasional, de minimis and infrequent use of City owned vehicles in a manner consistent with applicable policies for the use of City vehicles.

Any financial benefit from the authorized use of such resources and equipment is considered additional compensation, and the employee is solely responsible for any resulting income tax consequences. Notwithstanding this additional benefit, unless expressly authorized otherwise by the City Manager or the Manager's designee, City property including but not limited to vehicles, tools, equipment, furniture, etc. is to remain on-site and should not be borrowed or removed for any non-City function or activity that is not a job-related requirement.

#### *E. PERS (Public Employees' Retirement System) Benefits*

City of Sandy participates in the Public Employees Retirement System (PERS); therefore, your designation as a Tier I, Tier II, or Oregon Public Service Retirement Plan (OPSRP) member will depend on your prior PERS service and PERS rules. An employee's designation and eligibility for participation in PERS or the OPSRP are determined by law. For more information about these plans, please contact PERS at 1-888-320-7377 or visit their website at [www.oregon.gov/PERS](http://www.oregon.gov/PERS). For information about City of Sandy's contributions to employee PERS or OPSRP plans, please see the HR Director. The City of Sandy pays the employees' contribution (6% of subject salary) on behalf of the employee.

#### *F. Educational Opportunities*

City of Sandy shall pay the full cost of tuition for courses directly related to the employee's work and conducted outside the employee's regular working hours, provided that:

- Funds for such expenditures are available in the current budget;
- The employee has made application for approval of the course and tuition benefit to their department director at least ten days prior to the registration of such course;
- The employee submits evidence of satisfactory completion of the course; and
- The employee is not receiving reimbursement for tuition from any other source;

The City of Sandy will pay the accredited educational institution upon successful completion of the course. Employees will be required to pay back City paid educational costs if the employee terminates employment with the City of Sandy within one year from the completion of the course.

Courses that are only offered during regular working hours may be approved by the department director, provided time off can be arranged conveniently and reasonable arrangements can be made to make up time off.

The costs of textbooks and technical publications required for such courses shall be the responsibility of the employee unless the course is required by the City.

## V. Miscellaneous Policies

### A. *Alcohol/Drug Use, Abuse and Testing*

The City of Sandy works to maintain a safe and efficient work environment. Employees who misuse controlled substances, prescription or illegal drugs, or alcoholic beverages pose a risk both to themselves and to everyone who comes into contact with or depends upon them and risks damage to City of Sandy's reputation.

The City of Sandy expects employees to report to work in a condition that is conducive to performing their duties in a safe, effective, and efficient manner. An employee's off-the-job as well as on-the-job involvement with drugs and alcohol can have a significant impact on the workplace and can present a substantial risk to the employee who is using alcohol and drugs, to coworkers and others.

This policy applies to all employees (except where noted in this policy or where it is inconsistent with applicable law and/or collective bargaining agreement principles). This policy revises and supersedes all previous drug and alcohol testing policies and practices.

#### Prohibited Conduct

The following conduct is strictly prohibited and will result in disciplinary action up to and including termination:

- Possession, sale and/or use of drugs on City of Sandy premises, while in City of Sandy provided clothes, while on City of Sandy or work-related travel, or while on City of Sandy business (other than employees who possess drugs while they are engaged in law-enforcement work);
- Failure to notify City of sandy of an arrest or conviction under any criminal drug or alcohol statute within five days of the arrest or conviction;
- Possession and/or consumption of alcoholic beverages or being under the influence of alcohol during work hours, while in City of Sandy provided clothes or on City of Sandy premises, while operation a City of Sandy vehicle (or while operating a personal vehicle in connection with the performance of City of Sandy business), or while performing job functions other than at the employee's home (other than employees who possess drugs while they are engaged in law-enforcement work); or

- Being under the influence of drugs while on duty, on City of Sandy premises, on City of Sandy work time, while in City of Sandy provided clothes, while on City of Sandy business, or while operating a City of Sandy vehicle (or while operating a personal vehicle in connection with the performance of City of Sandy business.

As used in this policy, “drug” includes, but is not limited to, any controlled substance listed in Schedules I through V of the Federal Controlled Substance Act, including marijuana that is otherwise lawful to use under Oregon, Washington, or any other state’s law.

Prescription Drugs and Medical Marijuana

Apart from medical marijuana, nothing in this rule is intended to prohibit the use of a drug taken under supervision by a licensed healthcare professional, where its use does not present a safety hazard or otherwise adversely impact an employee's performance or City of Sandy operations.

An employee who uses prescription or over-the-counter drugs that may impair the employee’s ability to safely perform the job, or that may affect the safety or well-being of others, must notify HR Director of such use immediately before starting or resuming work. The City of Sandy may reassign the employee using the prescription drugs to other work or take other appropriate action to accommodate the physical or mental effects of the medication. Failure to report use of prescription drugs covered by this rule will subject an employee to disciplinary action, up to and including termination. (Although an employee is not required to provide The City of Sandy with the name(s) of the prescription medication(s) taken, medical verification of the prescription may be required.)

Employees who use medical marijuana in connection with a disability should discuss with their supervisor other means of accommodating the disability in the workplace, as The City of Sandy will not agree to allow an employee to use medical marijuana as an accommodation. (See “Disability Accommodation Policy,” above.)

Testing

City of Sandy reserves the right to:

- Subject applicants who are given a conditional offer of employment in a safety-sensitive position to a drug and/or alcohol test;
- Test employees reasonably suspected of using drugs or alcohol in violation of this policy;
- Discipline or discharge employees who test positive or otherwise violate this policy; and
- Test employees when they: (1) cause or contribute to accidents that seriously damage a City of Sandy vehicle, machinery, equipment or property; (2) result in an injury to themselves or another employee requiring offsite medical attention; or (3) when the City of Sandy reasonably suspects that the accident or injury may have been caused by drug or alcohol use.

The phrase “reasonable suspicion” (or in any variation) used in this policy means an articulable belief based on specific facts and reasonable inferences drawn from those facts that an employee is more likely than not under the influence of controlled substances or alcohol or has used drugs or alcohol in violation of this policy. Circumstances which can constitute a basis for determining "reasonable suspicion" may include, but are not limited to:



- A pattern of abnormal or erratic behavior;
- Information provided by a reliable and credible source;
- A work-related accident;
- Direct observation of drug or alcohol use;
- Presence of the physical symptoms of drug or alcohol use (*i.e.*, glassy or bloodshot eyes, alcohol odor on breath, slurred speech, poor coordination and/or reflexes);
- Unexplained significant deterioration in individual job performance;
- Unexplained or suspicious absenteeism or tardiness;
- Employee admissions regarding drug or alcohol use; and
- Unexplained absences from normal work areas where there is reason to suspect drug or alcohol related activity.

Supervisors should detail in writing the specific facts, symptoms or observations that form the basis for their determination that reasonable cause exists to warrant alcohol or controlled substance testing of an employee or a search. This documentation shall be forwarded to the HR Director. Whenever possible, supervisors should locate a second employee or witness to corroborate his/her “reasonable suspicion” findings.

An employee whose initial laboratory screening test for controlled substances yields a positive result shall be given a second test, consistent with the test first given. The second test shall use a portion of the same test sample withdrawn from the employee for use in the initial screening test. If the second test confirms the initial positive test result, the employee shall be notified of the results in writing by the HR Director. The letter of notification shall state the substance identified by the laboratory tests. The employee may request a third test of the sample within 24 hours of receiving the letter of notification, but such testing will be paid for by the employee.

#### Search of Property

When reasonable suspicion exists to believe an employee possesses alcohol or a controlled substance on City of Sandy property or has otherwise violated provisions of this rule regarding possession, sale or use of controlled substances or alcohol, City of Sandy may search the employee's possessions located on City of Sandy property, including but not limited to, clothes, locker, lunchbox, toolbox, and desk. Employees should have no expectation of privacy in any items they bring on to the City of Sandy property, or in property, equipment or supplies provided by the City of Sandy to employees.

#### Employee Refusal to Test/Search

An employee who refuses to consent to a test or a search when there is reasonable cause to suspect that the employee has violated this policy is subject to disciplinary action up to and including termination. The reasons for the refusal shall be considered in determining the appropriate disciplinary action.

An employee who refuses to cooperate with any tests required by this policy is also subject to discipline, up to and including termination. This includes, but is not limited to, tampering with, or attempting to tamper with, a specimen sample, using chemicals or other ingredients to mask or otherwise cover up the presence of metabolites, drugs or alcohol in a specimen, or providing a

blood or urine specimen that was produced by anyone or anything other than the employee being tested.

#### Crimes Involving Drugs and/or Alcohol

Employees shall report:

- Any criminal arrest or conviction for drug- or alcohol-related activity within five days of the arrest or conviction;
- Entry into a drug court or diversion program; or
- Loss or limitation of driving privileges when the employee's job is identified as requiring a valid driver's license (regular or CDL).

Failure to report as required will result in disciplinary action up to and including termination.

#### Drug and Alcohol Treatment

The City of Sandy recognizes that alcohol and drug use may be a sign of chemical dependency and that employees with alcohol and drug problems can be successfully treated. City of Sandy is willing to help such employees obtain appropriate treatment.

An employee who believes that he or she has a problem involving the use of alcohol or drugs should ask a supervisor or the HR Director for assistance.

The City of Sandy will work with an employee to identify all benefits and benefit programs that may be available to help deal with the problem. Attendance at any rehabilitation or treatment program will be a shared financial responsibility of the employee and City of Sandy to the extent its existing benefits package covers some or all the program costs.

Although the City of Sandy recognizes that alcohol and drug abuse can be successfully treated and is willing to work with employees who may suffer from such problems, it is the employee's responsibility to seek assistance *before* drug or alcohol problems lead to disciplinary action. Once a violation of City of Sandy policy is discovered, the employee's willingness to seek City of Sandy or outside assistance will not "excuse" the violation and generally will have no bearing on the determination of appropriate disciplinary action.

#### Confidentiality

All information from an employee's drug and alcohol evaluation is confidential and only those with a need to know are to be informed of test results. Disclosure of such information to any other person, agency, or City of Sandy is prohibited unless written authorization is obtained from the employee.

#### *B. Mobile Devices Policy*

This policy applies to employee use of cell phones, smart phones (including iPhones and similar devices), tablets and similar devices, all of which are referred to as "cellular devices" in the Cellular Devices Policy.

#### Mobile Devices in General (both City of Sandy provided and personal mobile devices)

Employees are allowed to bring personal cell phones and cellular devices to work with them. During working hours, however, employees should refrain from using them during working hours.

Employees who use personal or City of Sandy provided cell phones/cellular devices may not violate City of Sandy's policies against harassment and discrimination. Thus, employees who use a personal or City of Sandy provided cell phone/cellular device to send a text or instant message to another employee (or to a citizen or someone not employed by the City of Sandy) that is harassing or otherwise in violation of City of Sandy's no-harassment and no-discrimination policies will be subject to discipline up to and including termination.

City of Sandy encourages nonexempt employees to not use their personal or City of Sandy provided cell phone/cellular device for work purposes outside of their normal work schedule without written authorization in advance from the HR Director. This includes, but is not limited to, reviewing, sending, and responding to emails or text messages, and responding to calls or making calls.

#### Employee Use of City of Sandy Provided Mobile Devices

Mobile devices are made available to City of Sandy employees on a limited basis to conduct City of Sandy's business. Determinations as to which employees receive City of Sandy provided cell phones will be made on a case-by-case basis; employees are not guaranteed a cell phone or cellular device. In some cases, the City of Sandy may provide a monthly data allowance to employees who regularly make calls on behalf of the City of Sandy away from the office (see the HR Director for more information).

Employees who receive a mobile device from City of Sandy must agree to not use the device for personal use except in emergency situations and must abide by all aspects of the Mobile Device Policy. Further, employees who receive a cell phone or mobile device from City of Sandy must acknowledge and understand that because the cell phone/mobile device is paid for and provided by City of Sandy, or subsidized by City of Sandy, any communications (including text messages) received by or sent from the cell phone/mobile device may be subject to inspection and review if City of Sandy has reasonable grounds to believe that the employee's use of the cell phone violates any aspect of the Mobile Device Policy or any other City of Sandy policy. **Employees should have no reasonable expectation of privacy in a City of Sandy provided or paid for mobile device.** An employee who refuses to provide City of Sandy access to his/her personal cell phone/cellular device in connection with an investigation and after reasonable notice may be subject to discipline, up to and including termination.

#### Mobile Devices and Public Records

City of Sandy related business conducted on City of Sandy provided or personal mobile devices, may be subject to disclosure under Oregon's Public Records laws. City of Sandy employees may use text messages to communicate factual and logistical information that is not part of or related to conducting official City business, unless that information has been documented elsewhere, or will be documented and retained as a separate public record according to the City's authorized

record retention schedule. In the absence of separate documentation, City of Sandy employees are not to use text messages for official purposes other than for routine communications that do not meet the definitions of a “public record.” Questions related to what is and is not a public record should be forwarded to the City Recorder.

#### Mobile Device Use While Driving

The use of a mobile device while driving may present a hazard to the driver, other employees, and the general public. Subject to a few narrow exceptions for emergency or public safety purposes, Oregon law also prohibits the use of handheld cell phones while driving, even if the driving is for work-related reasons. This policy is meant to ensure the safe operation of City of Sandy vehicles and the operation of private vehicles while an employee is on work time. It applies equally to the usage of employee-owned cell phones and phones provided or subsidized by the City of Sandy.

Employees are prohibited from using handheld cell phones for any purpose while driving on City of Sandy authorized or City of Sandy related business. This policy also prohibits employees from using a cell phone or other device to send or receive text or “instant” messages while driving on City of Sandy business (other than those employees engaged in law enforcement work). Should an employee need to make a business call while driving, the employee must locate a lawfully designated area to park and make the call, unless the employee uses a hands-free cell phone or cellular device for the call. In either situation, such calls should be kept short and should the circumstances warrant (for example, heavy traffic, bad weather), the employee should locate a lawfully designated area to park to continue or make the call, even if the employee is using a hands-free device. Violation of this policy will subject the employee to discipline, up to and including termination.

#### *C. Use of City of Sandy Email and Electronic Equipment and Services*

City of Sandy uses multiple types of electronic equipment and services for producing documents, research and communication including, but not limited to, computers, software, email, copiers, telephones, voicemail, fax machines, online services, cell phones (including text messaging), the Internet and any new technologies used in the future. This policy governs the use of such City of Sandy property.

#### Ownership

All information and communications in any format, stored by any means on or received via City of Sandy’s electronic equipment or services is the sole property of City of Sandy.

#### Use

All of City of Sandy’s electronic equipment, facilities and services are provided and intended for City of Sandy business purposes only and not for personal matters, communications, or entertainment. In addition, access to the Internet, websites and other electronic services paid for by the City of Sandy are intended to be used for City of Sandy business. Incidental use is acceptable under specific circumstances. See “Fringe Benefits and Additional Compensation” policy above. This means, for example, that employees may not use the City of Sandy provided Internet, or City of Sandy electronic equipment and services to:

- Display or store any sexually explicit images or documents, or any images or documents that would violate City of Sandy’s no-harassment, no-discrimination or bullying policies;
- Play games (including social media games) or to use apps of any kind;
- Engage in any activity that violates the rights of any person or company protected by copyright, trade secrets, patent or other intellectual property (or similar laws or regulations);
- Engage in any activity that violates the rights to privacy of protected healthcare information or other City of Sandy specific confidential information;
- Engage in any activity that would introduce malicious software purposefully into a workstation or network (e.g., viruses, worms, Trojan horses); or
- Download or view streaming video for personal use. This includes, without limitation, YouTube videos, movies, and TV shows. Streaming audio is allowed, providing it does not contain explicit material, adversely affect network speed, or interfere with others’ ability to work.

Further, employees may not use City of Sandy provided email addresses to create or manage personal accounts (e.g., shopping websites, personal bank accounts, and social media accounts). City of Sandy email addresses for professional-based social media accounts such as LinkedIn may be allowed with the approval of the employee’s supervisor.

Inspection and Monitoring – No Right to Privacy

Employee communications, both business and personal, made using City of Sandy electronic equipment, facilities, and services are not private. Any data created, received, or transmitted using City of Sandy equipment, facilities or services are the property of City of Sandy and usually can be recovered even though deleted by the user.

All information and communications in any format, stored by any means on City of Sandy’s electronic equipment or services, are subject to inspection at any time without notice. Personal passwords may be used for purposes of security, but the use of a personal password does not affect City of Sandy’s ownership of the electronic information, electronic equipment, facilities, or services, or City of Sandy’s right to inspect such information. City of Sandy reserves the right to access and review electronic files, documents, archived material, messages, email, voicemail, and other such material to monitor the use of all of City of Sandy’s electronic equipment, facilities and services, including all communications and internet usage and resources visited. The City of Sandy will override all personal passwords if it becomes necessary to do so for any reason.

Personal Hardware and Software

Employees may not install personal hardware or software on City of Sandy’s computer systems without approval from the department director and IT Director. All software installed on City of Sandy’s computer systems must be licensed. Copying or transferring of City of Sandy owned software may be done only with the written authorization of the City Manager.

Unauthorized Access

Employees are not permitted unauthorized access to the electronic communications of other employees or third parties unless directed to do so by City of Sandy management. No employee

can examine, change, or use another person's files, output, or username unless they have explicit authorization from the department director and IT Director to do so.

#### Security

Many forms of electronic communication are not secure. Employees who use cell phones, cordless phones, fax communications or email sent over the Internet should be aware that such forms of communication are subject to interception and these methods of communicating should not be used for privileged, confidential, or sensitive information unless appropriate encryption measures are implemented.

#### Inappropriate Websites

City of Sandy's electronic equipment, facilities or services must not be used to visit Internet sites that contain obscene, hateful, or other objectionable materials, or that would otherwise violate City of Sandy's policies on harassment and discrimination.

#### *D. Social Media*

For purposes of this policy, "social media" includes all means of communicating or posting information or content of any sort on the Internet, including to your own or someone else's web log or blog, journal or diary, personal website, social networking or affinity website, web bulletin board or a chat room, whether or not associated or affiliated with City of Sandy, as well as any other form of electronic communication.

Ultimately, you are solely responsible for what you post online. Before creating online content, consider some of the risks and rewards that are involved. Keep in mind that any of your conduct that adversely affects your job performance, the performance of co-workers, or otherwise adversely affects our citizens or people who work on behalf of City of Sandy or City of Sandy's legitimate business interests may result in disciplinary action up to and including termination.

#### Prohibited Postings

Employees will be subject to discipline, up to and including termination, if they create and post any text, images or other media that violate City of Sandy's no-harassment and no-discrimination policies and that include discriminatory remarks, harassment, or threats of violence or similar inappropriate or unlawful conduct.

Do not create a link from your blog, website or other social networking site to a City of Sandy owned or maintained website without identifying yourself as a City of Sandy employee.

Express only your personal opinions. Never represent yourself as a spokesperson for the City of Sandy. If City of Sandy is a subject of the content you are creating, be clear and open about the fact that you are a City of Sandy employee and make it clear that your views do not represent those of City of Sandy or its employees or elected officials.

#### Encouraged Conduct

Always be fair and courteous to coworkers, the citizens we serve, City of Sandy's employees and elected officials, and suppliers or other third parties who do business with the City of Sandy. Also, keep in mind that you are more likely to resolve work-related complaints by speaking directly

with your co-workers or by utilizing our Open-Door Policy than by posting complaints to a social media outlet. Nevertheless, if you decide to post complaints or criticism, avoid using statements, photographs, video, or audio that reasonably could be viewed as malicious, obscene, threatening or intimidating, that disparage citizens, co-workers, City of Sandy employees or elected officials, or that might constitute harassment or bullying. Examples of such conduct might include offensive posts meant to intentionally harm someone's reputation or posts that could contribute to a hostile work environment on the basis of race, sex, disability, religion or any other status protected by law or City of Sandy policy.

Maintain the confidentiality of City of Sandy's confidential information. Do not post internal reports, policies, procedures or other internal, City of Sandy related confidential communications or information. (See "Confidential City of Sandy Information" policy, below.)

#### Request for Employee Social Media Passwords

City of Sandy's supervisors and managers are prohibited by law from requiring or requesting an employee or an applicant for employment to disclose or to provide access through the employee's or applicant's username and password, password or other means of authentication that provides access to a personal social media account. This includes, without limitation, a username and password that would otherwise allow a supervisor/manager to access a private email account not provided by City of Sandy.

Nothing in this policy prohibits City of Sandy from requiring an employee to produce content from his or her social media or internet account in connection with a City of Sandy sponsored investigation into potential misconduct, unlawful or unethical behavior, or policy or rule violations.

#### *E. External Links*

City of Sandy only allows hyperlinks in its website if the links connect to websites that fall into one of the following categories:

- The website is owned by an organization that is parented with, sponsored by, or supported by City of Sandy;
- The website is educational in nature; and
- The website is a governmental website or is sponsored by a state or local government.

City of Sandy will not allow any hyperlinks to any websites that advocate hate, bias, or discrimination, extremism or which contain information or hyperlinks associated with partisan political activity.

The links to websites that are external to the City of Sandy may provide additional information that may be useful or interesting and are being provided consistent with the intended purpose of the City of Sandy website. These external links are not endorsements of the organization, nor do they ensure the accuracy, relevance, timeliness, or completeness of the information. Further, the inclusion of links in hypertext on the City of Sandy web site are not intended to reflect their importance, nor are they intended to endorse any views expressed or products or services offered by the author of the reference or the organization operating the server on which the reference is maintained.

Links may be made to our website from personal and organizational web pages. We request that you link to our website rather than downloading portions of it to another web server, so that viewers will see the most up-to-date information.

Every effort has been made to provide accurate and complete information. However, we cannot guarantee that there will be no errors. City of Sandy does not assume any legal liability for the accuracy, completeness, or usefulness of any information, product, or process disclosed herein, or represents that use of such information, product, or process would not infringe on privately owned rights.

#### *F. Department Rules and Regulations*

Each department of the City of Sandy is encouraged to establish departmental rules, regulations, and procedures. Such rules, regulations, and procedures shall be in harmony with the provisions of these personnel rules and regulations and shall be binding on the employees of that department.

#### *G. Confidential City of Sandy Information*

Employees must not access, use, or disclose sensitive or confidential information or data except in accordance with City of Sandy policies, practices, and procedures, and as authorized by state or federal laws or regulations. Employees with access to confidential information, including but not limited to customer or employee financial, medical, or personal information (including, without limitation, Social Security numbers), are responsible for the safekeeping and handling of that information to prevent unauthorized disclosure. Employees who access, use, or disclose confidential information contrary to Oregon or federal laws or for personal use or financial gain may be subject to civil or criminal penalties under those laws, in addition to appropriate disciplinary action for violating this policy.

No records or information including (without limitation) protected medical data, documents, files, records, computer files or similar materials (except in the ordinary course of performing duties on behalf of the City of Sandy) may be removed from our premises without permission from the City Manager. Likewise, any materials developed by City of Sandy's employees in the performance of their jobs is the property of City of Sandy and may not be used for personal or financial gain. Additionally, the contents of records or information otherwise obtained in regard to the City of Sandy's business may not be disclosed to anyone, except where required for a business purpose or when required by law.

#### *H. Ethics*

At City of Sandy, we believe in treating people with respect and adhering to ethical and fair business practices. We expect employees to avoid situations that may compromise their reputation or integrity, or that might cause their personal interests to conflict with the interests of the City of Sandy or the City of Sandy's citizens.

Employees are expected to model and reinforce ethical behavior in accordance with our policies. This includes, but is not limited to, maintaining the privacy and confidentiality of information protecting the assets of the organization, conducting business with honesty, following through on commitments, admitting mistakes, and showing consistency in words and actions.



We at the City of Sandy are public employees, and as such, are also subject to the State of Oregon's ethics laws. In some cases, these laws provide additional limitations on employees, such as prohibitions on gifts and strict definitions of conflict of interest. If you are coming to the City of Sandy from work in the private sector, you may find that some activities that are common business practices in the private sector are prohibited in the public sector. Information on these laws is available at the Oregon Government Ethics Commission website: <http://www.oregon.gov/OGEC>.

If you have questions about whether an activity meets the City of Sandy's or Oregon's ethical standards, please talk with your manager. Employees who violate the Ethics Policy, or who violate Oregon ethics laws, may be subject to disciplinary action up to and including termination.

#### *I. Open-Door Policy*

City of Sandy's Open-Door Policy is based on our belief that open, honest communication between managers and employees should be a common business practice. City of Sandy's managers and supervisors are responsible for creating a work environment where employee input is welcomed, and where issues are surfaced early and shared without the fear of retaliation (when the employee provides the input in good faith). If you have a complaint, suggestion, or question about your job, working conditions, or the treatment you are receiving from anyone in the City of Sandy, please raise them first with your immediate supervisor. If you are not satisfied with the response from your immediate supervisor, or if your issue involves your immediate supervisor, request to have the facts/situation reviewed by the HR Director.

#### *J. Outside Employment*

Generally, employees may obtain employment with an employer other than the City of Sandy or engage in private income-producing activity of their own so long as that activity is not otherwise prohibited by these rules. Employees are responsible for ensuring that their outside employment does not conflict with these rules.

An employee is prohibited from, directly or indirectly, soliciting or accepting the promise of future employment based on the understanding that the offer is influenced by the employee's official action.

Employees may not accept outside employment that involves:

- The use of City of Sandy time (including the employee's work time), facilities, equipment and supplies, or the prestige or influence of the employee's position with City of Sandy. In other words, the employee may not engage in private business interests or other employment activities on the City of Sandy's time or using the City of Sandy's property;
- The performance of an act that may later be subject to control, inspection, review, or audit by the department for whom the employee works; or
- Receipt of money or other consideration for performance of duties that the employee is required to perform for the City of Sandy.

The City of Sandy requires employees to report outside employment to their Supervisor and the HR Director on an annual basis, or sooner if any changes in outside employment occurs.

### *K. Criminal Arrests and Convictions*

Employees must promptly and fully disclose to their supervisor on the next working day:

- All drug- or alcohol-related arrests, citations, convictions, guilty pleas, no contest pleas or diversions that result from conduct which occurred while on duty, on City of Sandy property, or in an City of Sandy vehicle (see “Alcohol/Drug Use, Abuse and Testing” policy above);
- All arrests, citations, convictions, guilty pleas, or no contest pleas that result from crimes involving the theft or misappropriation of property, including money; or
- If you are arrested, cited, or convicted of a violation of any law that will prevent you from performing the essential functions of your position.

Reporting an arrest or conviction will not automatically result in termination of employment. Situations will be evaluated on a case-by-case basis.

Employees who are unavailable to report for work because they have been sent to jail or prison may not use sick leave or vacation time to cover the absence, and may be subject to disciplinary action, including termination.

### *L. Political Activity*

Employees may engage in political activity except to the extent prohibited by Oregon law when on the job during working hours. This means that employees cannot:

- Be required to give money or services to aid any political committee or any political campaign;
- Solicit money or services (including signatures) to aid or oppose any political committee, nomination or election of a candidate, ballot measure or referendum, or political campaign while on the job during working hours (this is not intended to restrict the right of City of Sandy employees to express their personal political views); or
- Be disciplined or rewarded in any manner for either giving or withholding money or services for any political committee or campaign.

### *M. Inclement Weather/Emergency Closing*

Except for regularly scheduled holidays identified by the City of Sandy (see “Holidays” section) City of Sandy is open for business on Mondays through Fridays during normal business hours. If there are circumstances beyond our control, such as inclement weather, a national crisis, or other emergencies that make one or more of our office locations inaccessible for all or part of a regularly scheduled workday, the City Manager (or his/her designee) will decide whether to and to what extent the City of Sandy will close. In the event of a closure, employees will be notified via email, sent to their City of Sandy provided email address. In addition, closure information will be posted on the City of Sandy website.

In the event of extreme bad weather, we recognize that each employee’s ability to safely reach work may be different. If you cannot safely report to work in such circumstances, you should contact your manager. Essential staff are expected to report to work for the overall safety of the city and citizens. If nonessential staff cannot reach the office and are able to serve the City of

Sandy from home, you should do so subject to approval by your manager or supervisor. If the city is open but a nonessential employee cannot safely report to work, the employee may use vacation leave and notify their supervisor.

#### *N. Driving While on Business*

Employees using a private vehicle to conduct City of Sandy's business must possess a valid driver's license and must carry auto liability insurance. Employees who use their own vehicles for authorized City of Sandy business use should make any necessary arrangements with their insurance carriers.

The City of Sandy may verify the validity of your driver's license and/or your driving record at the time of hire and at any point during your employment. While on City of Sandy business, drivers are expected to make every reasonable effort to operate their vehicle safely, with due regard for potential hazards, weather, and road conditions. Drivers are to obey all traffic laws, posted signs and signals, and requirements applicable to the vehicle being operated. Seatbelts are to be used in all vehicles while on business. Drivers are to ensure that the use of prescribed or over the counter drugs does not interfere with their ability to drive while on business; operating a vehicle under the influence of alcohol or controlled substances is prohibited. Employees are responsible for notifying their manager of any subsequent restrictions, limitations, or other change in their driving status within 72 hours of the change or new restrictions/limitations.

Employees who receive a ticket or citation while driving a City of Sandy owned vehicle or while on City of Sandy business will be responsible for paying the fine (if any) associated with the ticket or citation and may face discipline up to and including termination.

#### *O. Workplace Violence*

The City of Sandy recognizes the importance of a safe workplace for employees, customers, vendors, contractors, and the general public. A work environment that is safe and comfortable enhances employee satisfaction as well as productivity. Therefore, threats and acts of violence made by an employee or member of the public against another person's life, health, well-being, family, or property will be dealt with in a zero-tolerance manner by the City of Sandy.

All employees have an obligation to report any incidents that pose a real or potential risk of harm to employees or others associated with the City of Sandy, or that threaten the safety, security, or financial interests of the City of Sandy. Employees should make such reports directly to the HR Director.

The City of Sandy also may conduct an investigation of a current employee where the employee's behavior raises concern about work performance, reliability, honesty, or potentially threatens the safety of co-workers or others. See policy on "Workplace Inspections."

#### *P. Workplace Inspections – No Right to Privacy or Confidentiality*

This policy applies to inspections and investigations conducted by City of Sandy pursuant to policy or law unless otherwise modified by a different policy in this Handbook.

An employee investigation may include, but is not limited to, investigation of criminal records; it may also include a search of desks, work areas, file cabinets, voicemail systems and computer

systems. **Employees are strongly discouraged from storing personal items in the desks, lockers, work areas, file cabinets and other office equipment or furniture, as well as voicemail and computer systems assigned to them by the City of Sandy; these areas are not private.**

All information related to reports generated from inspections and investigations, including the name of the reporting employee(s), will be kept as confidential as possible under the circumstances.

#### *Q. Workplace Safety*

In addition to defined working conditions and physical requirements detailed in each position description, employees are accountable for working safely, following established policies and procedures, utilizing all designated personal protective equipment (PPE) and/or safety equipment assigned for each task, and reporting all injuries and hazards to their supervisor immediately. Employees may be asked to participate in the Safety Committee for a one-year assignment as part of their employment with the City of Sandy. Supervisors and Managers are accountable for ensuring the safety performance of employees, applying consistent practices in compliance with federal, state, and local regulations, and providing guidance to maintain a safe and healthy work environment. Concerns related to workplace safety should be brought to the attention of the HR Director.

#### *R. Fragrances in the Workplace*

The City of Sandy strives to ensure the comfort and safety of staff and visitors by encouraging employees to be mindful of the scented products that they use. Many City of Sandy offices are small, enclosed spaces. City of Sandy requests that all scented products be used in a manner which is courteous and respectful of those around you. If you are experiencing issues related to scented products in the workplace, please contact the HR Director for assistance in finding a solution that is mutually agreeable to all employees.

#### *S. Smoke-Free Workplace*

The City of Sandy provides a tobacco-free environment for all employees and visitors. For purposes of this policy, "tobacco" includes the smoking of any tobacco-based product, smoking in any form (including, without limitation, cigars, and e-cigarettes), and the use of oral tobacco products or "chew/spit" tobacco. Marijuana is also prohibited under this policy. This policy applies to employees, volunteers, and any visitors to City of Sandy property, vehicles, or facilities/buildings.

City of Sandy buildings and vehicles are tobacco-free areas. Tobacco use is prohibited during working hours. Further, the City of Sandy prohibits tobacco use in or around City of Sandy vehicles, equipment, machinery, and property.

If you wish to smoke, you must do so outside of City of Sandy's facilities/buildings, and out of visitor view. Smoking and the use of tobacco is not allowed on city property.

#### *T. Animals in the Workplace*

Employees are not allowed to bring pets or other animals into the City of Sandy facilities or City owned vehicles, and any other building, site or vehicle owned, controlled, or operated by the City

of Sandy. City owned parks and greenspaces are excluded from this definition only when the employee is not working for or performing any duties on behalf of the City of Sandy.

In certain circumstances, the City of Sandy may be willing to accommodate service or working animals for employees with known disabilities. Please see the HR Director for further information.

## VI. Termination of Employment

### A. *Workplace Rules and Prohibited Conduct*

Any violation of the rules or prohibited conduct in this policy may result in discipline, up to and including termination. This list of prohibited conduct is illustrative only; other types of conduct injurious to security, personal safety, employee welfare and City of Sandy's operations, some of which are described elsewhere in this Handbook, may also be grounds for discipline, up to and including termination.

- Falsification of employment or other City of Sandy records.
- Recording of work time of another employee or allowing any other employee to record your work time or allowing falsification of any time sheets (your own or another employee's).
- Theft or the deliberate or careless damage or destruction of any City of Sandy property, or the property of any other employee, citizen, vendor or third party.
- Unauthorized use of City of Sandy equipment, materials, or facilities.
- Provoking a fight or fighting during work hours or on City of Sandy property.
- Engaging in criminal conduct while at work.
- Causing, creating, or participating in a significant or substantial disruption of work during working hours on City of Sandy property.
- Insubordination, including but not limited to failure or refusal to obey the orders or instructions of a supervisor or member of management, or the use of abusive or threatening language toward another City of Sandy employee, customer, or vendor.
- Failure to notify a supervisor when unable to report to work, or when leaving work during normal working hours without permission from a supervisor to do so.
- Failure to observe work schedules, including rest breaks and meal periods. You are expected to be at work on time, remain until your workday ends, and perform the work assigned to or requested of you.
- Sleeping or malingering on the job.
- Excessive personal telephone calls during working hours.
- Unprofessional appearance during normal business hours.
- Failing to attend scheduled work sessions and related activities at conferences, workshops, or educational events that are paid for by the City of Sandy.
- Misrepresentation of City of Sandy policies, practices, procedures, or your status or authority to enter into agreements on behalf of the City of Sandy. Employees may not use the City of Sandy's name, logo, likeness, facilities, assets, or other resources of the City of Sandy for personal gain or private interests.
- Violations of the Ethics Policy or Oregon's Ethics laws.

- Violation of any safety, health, security or City of Sandy policy, rule, or procedure. Employees are expected to act in accordance with all appropriate codes, laws, regulations, and policies, regardless of whether they are set by the City of Sandy or outside regulatory or legislative bodies.
- Failing to timely pay water/sewer/tax accounts with the City of Sandy on time, and/or whose City of Sandy provided services are disconnected. This includes, without limitation, situations where the employee writes a check to the City of Sandy that is refused for payment due to non-sufficient funds.
- Harassment or discrimination that violates City of Sandy policy.

This statement of prohibited conduct does not alter the City of Sandy's policy of at-will employment. With the exception of employees subject to a collective bargaining agreement or contract of employment, the City of Sandy remains free to terminate the employment relationship at any time, with or without cause or notice.

#### *B. Corrective Action/Discipline Policy*

Employees are expected to perform to the best of their abilities at all times. There will be occasions, however, where employees perform at an unsatisfactory level, violate a policy or law, or commit an act that is inappropriate. When performance or conduct does not meet the City of Sandy standards, the City of Sandy will determine whether it will terminate the employee's employment or provide the employee a reasonable opportunity to correct the deficiency through progressive discipline (such as, in no particular order, verbal warnings, written warnings, suspensions without pay, and demotions). The corrective action process will not always commence with a verbal counseling or include a sequence or steps. Some acts, particularly those that are intentional or serious, warrant more severe action (including termination) on the first or subsequent offense.

In lieu of terminating employment of an employee for serious violations of City of Sandy policies, procedures, and rules and for other inappropriate behavior or conduct, City of Sandy may choose to provide the employee a final opportunity to continue employment in the form of a last-chance agreement. The City of Sandy may also choose to send the employee to training or an education opportunity.

In all cases, the City of Sandy retains sole discretion to determine the nature and extent of any discipline based upon the circumstances of each individual case. Accordingly, the City of Sandy reserves the right to proceed directly to a written warning, demotion, last chance agreement, or termination for misconduct or performance deficiency, without any prior disciplinary steps, when the City of Sandy deems such action appropriate. The City of Sandy retains the right to terminate any employee's employment at any time and for any reason, with or without advance notice or other prior disciplinary action (other than those employees who are subject to a collective bargaining agreement or contract of employment).

#### *C. Grievance Policy*

The City of Sandy shall promptly consider and equitably adjust employee grievances relating to employment conditions and relationships. Furthermore, the City of Sandy desires to adjust the

causes of grievances informally; both supervisors and employees are expected to resolve problems as they arise. In the event that problems are not resolvable through an informal process in the course of daily departmental practices, a formal grievance procedure may be initiated by the aggrieved employee(s).

The following steps shall be followed in submitting and processing a grievance:

1. The aggrieved employee(s) shall present their grievance in written form, including any substantiating evidence or documentation, to the department director, or immediate supervisor, if appropriate. The grievance should be signed and dated by all aggrieved parties and presented to the department director or supervisor within ten (10) working days of the occurrence, not including the date of the occurrence. The aggrieved employee(s) shall acknowledge receipt of the response with their signature(s) and date received.
2. If the grievance is not settled in Step One, above, the written grievance shall be presented along with any substantiating evidence or documentations in its original form to the City Manager within ten (10) working days after the department director's or supervisor's response is presented, not including the date of the response. The City Manager may meet with the aggrieved employee(s), the immediate supervisor, if appropriate, and the department director. The City Manager shall reply to the grievance in writing within ten (10) working days of the date of the presentation of the written grievance, not including the date of the presentation. The decision of the City Manager shall be final and binding.

If the aggrieved employee(s) do not initiate and follow the grievance procedures as established by this section, the grievance shall be considered not to have existed.

Any grievance not taken to the next step of the grievance procedure shall be considered settled on the basis of the last reply made and received in accordance with the provisions of this section. Following the settlement of a formally presented written grievance, the department director shall document the terms of the settlement, including any action to be taken. Both the department director and the aggrieved employee(s) shall sign the written report and include the date of signature.

#### *D. Retirement or Resignation from Employment*

If you choose to resign or retire, it is anticipated that you will give the City of Sandy as much notice as possible – preferably, a minimum of two weeks. When giving your two-weeks' notice, vacation, personal, or sick days should not be used in lieu of notice. If you do not give two-weeks' notice of your intent to leave the City of Sandy, you will not be eligible for re-employment at a later date.

Employees who miss three or more consecutive workdays without contacting their immediate supervisor are typically considered to have resigned their employment.

If the employee's decision to resign is based on a situation that could be corrected, the employee is encouraged to discuss it with the HR Director before making a final decision.

Employees must return all City of Sandy property, including phones, computers, identification cards, credit cards, keys, and manuals, to the HR Director on or before their last day of work.

*E. References*

All requests for references or recommendations must be directed to the HR Director. No manager, supervisor or employee is authorized to release references for current or former employees. Managers and supervisors are expressly prohibited from providing LinkedIn “recommendations” or using a website on the internet to discuss a current or former employee’s performance or termination of employment.

By policy, the City of Sandy discloses only the dates of employment and position(s) held by former employees. Former employees who authorize additional disclosures must make a request to do so in writing.





## Employee Acknowledgement

### Acknowledgement of Receipt of 2023 Personnel Policies

I acknowledge that I have received and will read a copy of the City of Sandy's 2023 Personnel Policies. I also understand that a copy of the Personnel Policies is available to me at any time to review in the Human Resources Department, or on-line via the Employee Intranet.

I understand that the City of Sandy has adopted the Personnel Policies only as a general guide about policies, work rules and the work environment, and that they are subject to change at any time in City of Sandy's sole discretion. I also understand that the Personnel Policies control over any other contradictory statements, other than those found in applicable collective bargaining agreements. I acknowledge that the Personnel Policies are not an employment contract and are not intended to give me any express or implied right to continued employment or to any other term or condition of employment.

I understand that either the City of Sandy or I may terminate my employment relationship at any time, for any lawful reason, with or without cause, and with or without advance notice, unless my employment is covered under a collective bargaining agreement. Other than promises that may be found in that collective bargaining agreement, I acknowledge that no promises have been made to me that are inconsistent with this "at will" statement.

I have reviewed or will review the City of Sandy's policies regarding equal employment opportunity and provides a workplace free of harassment and discrimination. I will bring any questions or concerns I have regarding equal employment opportunities, discrimination, retaliation or harassment to my supervisor, the HR Director, or any trusted manager or supervisor.

During my employment with the City of Sandy, I understand that it is my responsibility to remain informed about the policies as revisions, updates and new policies as issued, and to ask questions about any interpretation of any of the policies.

I have read this acknowledgement carefully before signing.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

*The original of this document will be kept in the Employee's personnel file. A copy will be provided to the Employee upon request.*



## Staff Report

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**Meeting Date:** June 5, 2023

**From** David Snider, Economic Development Manager

**SUBJECT:** Adoption of Economic Development Strategic Plan 2023

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### **DECISION TO BE MADE:**

To adopt the final version of the Economic Development Strategic Plan as amended.

### **PURPOSE / OBJECTIVE:**

To review additional content that was added to the Economic Development Strategic Plan per City Council request, and to adopt the plan if those requests were adequately addressed in the attached final version.

### **BACKGROUND / CONTEXT:**

During a work session at the [May 15th City Council meeting](#), the penultimate version of the Economic Development Strategic Plan (EDSP) was presented to the Sandy City Council by Elliot Weiss of Community Attributes Inc. Following thorough development by the Economic Development Advisory Board, the purpose of the work session was to give Council an opportunity to review the plan and request content additions or changes prior to adoption.

At this work session, Council recommended that two changes be incorporated into the plan. The changes made are as follows (new material in bold):

- Provide more emphasis on leveraging Sandy's transit system (Sandy Area Metro)
  - Additional action added to Strategy 1.1 (Improve access to health care, child care, job training and assistance programs) to reflect this request.
  - **Action 1.1.5: Work with Sandy Area Metro to identify opportunities to align transportation services, including through route planning, to improve access to assets and programs described above.**
- Highlight possibilities of leveraging metals fabrication in conjunction with the emerging mass timber industry.
  - Additional strategy and action added to Goal 3 (Build on our businesses and workers in manufacturing to establish Sandy as a destination for metals fabrication and related activities) to reflect this request.
  - **Strategy 3.2: Carve a niche in subsectors of metals fabrication specific to outdoor equipment and tool manufacturing and other unique regional assets.**
  - **Action 3.2.1: Collaborate with the private sector and other regional economic development organizations to host a summit or**

**convention in Sandy for local metal fabrication and related businesses to opportunities in outdoor equipment, tool manufacturing, mass timber components and other unique regional assets.**

The final version of the EDSP with these changes included is included as an attachment to this staff report and is intended to be the final copy of the Economic Development Strategic Plan.

**RECOMMENDATION:**

Staff recommends that the City Council review the additional content added to this final draft of the Economic Development Strategic Plan and adopt the plan if their concerns are adequately addressed.

**SUGGESTED MOTION LANGUAGE:**

"I move to adopt the Sandy Economic Development Strategic Plan 2023, as included in the agenda packet."

**LIST OF ATTACHMENTS/EXHIBITS:**

- City of Sandy Economic Development Strategic Plan 2023



# Economic Development Strategic Plan



March 2023

where innovation meets elevation

# ACKNOWLEDGEMENTS

## City of Sandy Staff

Jordan Wheeler, City Manager  
Greg Brewster, Director, SandyNet  
Jeff Aprati, Director of Policy and Community Relations  
David C. Snider, Economic Development Manager

## The Sandy Community

### The Economic Development Advisory Board

- Jeremy Pietzold (Chair, former Council President)
- Hans Wipper (Owner, Wippersnappers Kid's Play Place)
- William Schwartz (Owner, Boring Brewing)
- Khrys Jones (Executive Director, Sandy Area Chamber)
- Paul Reed (Owner, Mt. Hood Athletic Club)
- Kurt McKnight (Owner, Everfresh Fruit Company)
- Ernie Brache (Owner, AEC, Inc.)

Extra thanks to Hans Wipper and Tiffany Vanek for hosting the Future Fest event in October at Wippersnappers.

## Sandy Mayor & Council

Stan Pulliam, Mayor  
Laurie Smallwood, Council President  
Chris Mayton  
Rich Sheldon  
Kathleen Walker  
Carl Exner  
Don Hokanson  
Jeremy Pietzold (Fmr Council President)

## Public Consultants

### Community Attributes, Inc.

Chris Mefford, President & CEO, CAI  
Elliot Weiss, Project Manager, CAI  
Cassie Byerly, Planning Analyst, CAI  
Carly Bednarski, GIS Analyst, CAI  
Bryan Lobel, Senior Planner, CAI

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# A VISION...

## ...for Sandy's economic future

This vision statement is aspirational and describes what stakeholders in this planning process desire for the economic future of Sandy. Implementation of strategies and actions in this plan in the coming months and years will move Sandy forward toward this vision.

*Sandy is a vibrant community that leverages the economic might of the metropolitan area and the outdoor gems of Mt. Hood, offering businesses and residents a unique balance between professional opportunity and outstanding quality of place. We cherish the small businesses that propel our dynamic downtown and welcome visitors who wish to experience all that Sandy has to offer, while strategically investing in new, high-quality jobs for our talented residents.*



# INTRODUCTION

## Purpose

Simply put, an economic development strategic plan is a tool to articulate and realize your community's economic vision and take control of your economic future. At the heart of an Economic Development Strategic Plan is a roadmap to achieving this economic vision for a town, city, county, or region, typically in a 5- to 10-year time horizon.

- Establish a baseline against which to assess Sandy's economy by profiling the socio-economic characteristics of the City over time, and compared to the County, region, nation and / or peer cities.
- Identify & convene partners & stakeholders in Sandy's economic future and negotiates roles, capacities, and coordination.
- Articulate a diverse, sustainable, equitable and place-based vision for Sandy's economic future and establishes a roadmap for how to achieve it.

- Signal intention on the part of the City and its partners regarding economic policy to provide assurance to potential investors & developers.
- Facilitate implementation by identifying priority actions to develop near-term momentum and excitement for mid- and longer-term interventions.

## Process

The creation of Sandy's Economic Development Strategic Plan relied on data collection and analysis and robust outreach to stakeholders and the community at large. Key components of this process include the following:

- Economic Development Advisory Board Meetings.
- Technical Assistance Committee Meetings.
- Future Fest Open House.

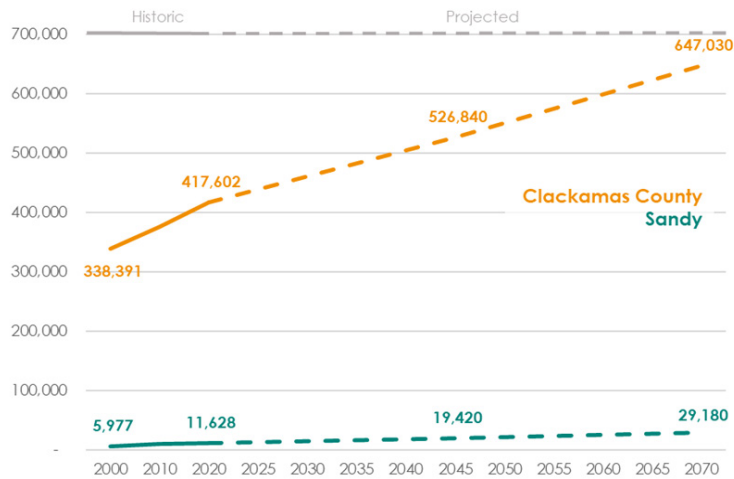
# Context

Supplemental information to the Economic Opportunity Analysis (EOA) was developed that highlights historic and projected population and economic trends, analysis of current jobs and employment, an assessment of conditions and trends of Sandy's resident workforce, housing, and COVID-19 impacts.

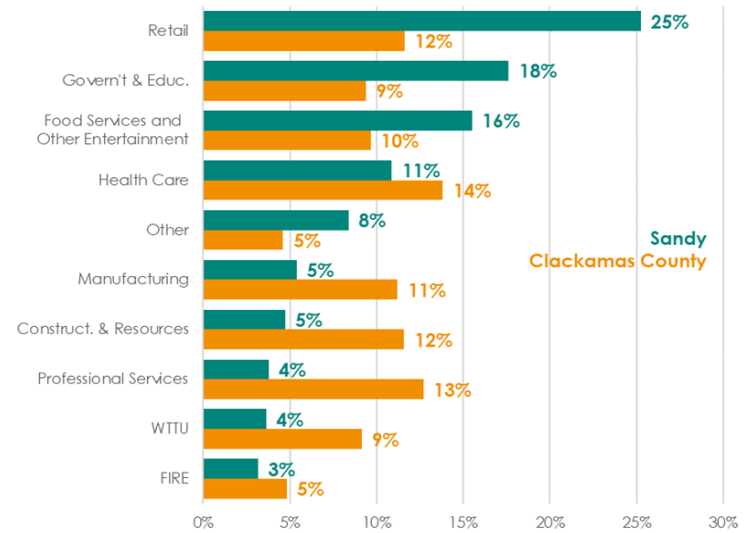


**SANDY'S LARGEST INDUSTRY IS RETAIL, WHICH ACCOUNTS FOR ONE-QUARTER OF ALL JOBS.**

Observed and Forecasted Population, City of Sandy and Clackamas County, 2000-2070 (PSU)



Share of Jobs by Industry, City of Sandy and Clackamas County, 2019 (LEHD)



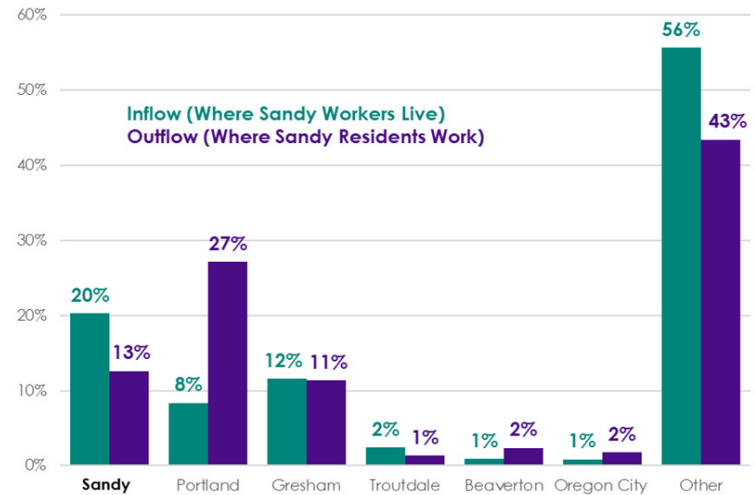
**SANDY WILL DOUBLE ITS POPULATION BY 2050 AND REACH A POPULATION OF 29,180 BY 2070. IT IS ESTIMATED TO ADD BETWEEN 2,000 AND 2,500 NEW JOBS AND CLOSE TO 3,000 NEW PEOPLE BY 2043.**



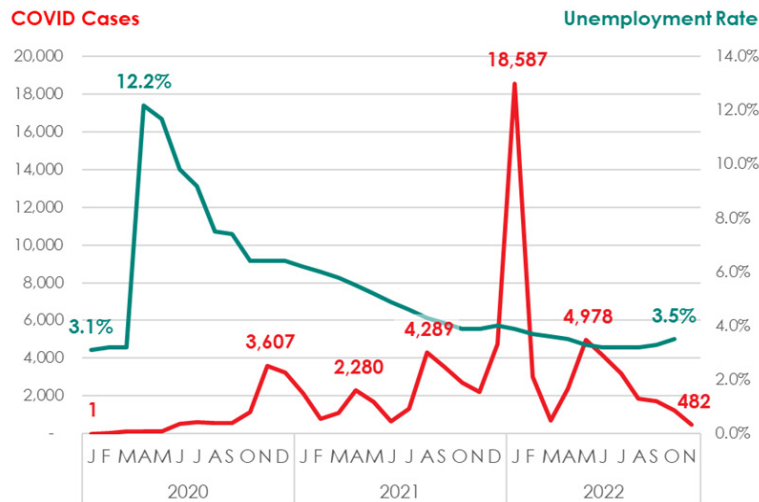


**OVER A QUARTER OF SANDY'S RESIDENTS COMMUTE TO WORK IN PORTLAND (27%), WHILE A SMALLER PORTION REMAIN IN SANDY (13%) OR COMMUTE TO GRESHAM (11%).**

Top Destinations and Origins for Commuters, City of Sandy, 2019 (LEHD)



Unemployment Rate and Positive COVID-19 Tests by Week, Clackamas County, 1/20-11/22 (Oregon Health)



**UNEMPLOYMENT IN CLACKAMAS COUNTY RETURNED TO NEAR PRE-PANDEMIC LEVELS IN LATE 2022 AS COVID CASES SPIKED AND THEN DECREASED TO BELOW SUMMER 2020 LEVELS.**



# CHAPTER 3

## Goals, Strategies & Actions

# Navigating this Document

The following section presents the Goals, Strategies, and Actions aimed at growing a sustainable and inclusive economy for Sandy. The following example illustrates how this section of the Strategic Plan is organized.

The plan contains 6 Goals around which the strategies and actions are organized. Goals are color-coded for easy identification.

Individual Strategies correspond to each goal with like colors. Strategies represent a cohesive approach to achieving a goal and consist of a number of specific, inter-related Actions.

Actions are where the rubber hits the road in this plan. Specific, implementable tactical measures are highlighted and organized numerically.

**goal 3** Build on our businesses and workers in manufacturing to establish Sandy as a destination for metals fabrication and related activities.

**Strategy 3.1: Support and identify opportunities for business expansion among strong base of metals fabrication industries**

**Action 3.1.1** Establish an informal quarterly forum for area metal fabrication businesses to share industry-specific retention and expansion needs.

**Strategy 3.2: Carve a niche in subsectors of metals fabrication specific to outdoor equipment and tool manufacturing**

**Action 3.2.1** Collaborate with the private sector and other regional economic development organizations to host a summit or convention in Sandy for local metal fabrication and related businesses to opportunities in outdoor equipment and tool manufacturing.

**Action 3.2.2** Identify opportunity sites for both expansion and recruitment of metals fabrication and outdoor tool manufacturing and equipment providers that responds to notable land constraints in the Economic Opportunity Analysis.

**Action 3.2.3** Establish marketing to support alignment between area metal fabrication industries and outdoor gear and apparel.

chapter 3 | Goals, Strategies, and Actions 19

## Goals At-A-Glance

- goal 1** Improve systems to ensure broad and durable access to economic opportunity and maintain Sandy's high quality of life.
- goal 2** Leverage our investments in technology to maximize economic benefits.
- goal 3** Build on our assets in manufacturing to establish Sandy as a destination for metals fabrication and related activities.
- goal 4** Cultivate innovation in specialty food and beverage industries and align with the region's robust food storage and processing sector.
- goal 5** Invest in hospitality and place-based tourism to make Sandy the most active and vibrant basecamp for Mt. Hood area adventures.
- goal 6** Be a leader as both retail hub and heart of East Clackamas County.

# Strategies At-A-Glance

- 1.1 Improve access to health care, child care, job training, and assistance programs
- 1.2 Expand job training and wraparound services for youth and disadvantaged workers
- 2.1 Foster entrepreneurship and drive new business creation
- 2.2 Invest in broader awareness and utility of sandynet and other resources and amenities that support and attract home-based workforce
- 3.1 Support and identify opportunities for business expansion among strong base of metals fabrication industries
- 3.2 Carve a niche in subsectors of metals fabrication specific to outdoor equipment and tool manufacturing
- 4.1 Leverage proximity to nearby produce growers and fruit loop to expand cold storage and processing industry
- 4.2 Expand on sandy's innovative outlets for food service providers
- 5.1 Identify and market opportunity sites for expansion of lodging and supportive retail connected to Mt. Hood vicinity opportunities
- 5.2 Establish sandy as the most active and vibrant basecamp for Mt. Hood area adventures
- 5.3 Expand on local recreation opportunities to establish sandy as its own destination for area outdoor adventures
- 6.1 Leverage undeveloped areas to support larger retail business expansion
- 6.2 Expand small downtown retail opportunities as part of pleasant street master plan and infill of underutilized sites
- 6.3 Focus business attraction on experiential retail and retail options that can sidestep competition with online shopping

# goal 1 Improve systems to ensure broad and durable access to economic opportunity and maintain Sandy's high quality of life.

## Strategy 1.1 Improve access to health care, child care, job training, and assistance programs

- Action 1.1.1** Communicate Sandy's anticipated needs and advocate for expansion of local health care facilities that ensure health services, with a specific focus on 24/7 urgent care.
- Action 1.1.2** Conduct outreach to the City of McMinnville, Sherman and White River health districts (or others as appropriate) to identify and implement best practices in expanding health care services in non-metropolitan settings.
- Action 1.1.3** Work with local healthcare providers to support and communicate resources available to attract qualified workers to Sandy, including onboarding, coaching & mentoring, and supportive services like childcare; position Sandy as a traveling nurse destination for skiers, climbers, mountain bikers, etc.
- Action 1.1.4** Expand accessible and affordable child care facilities to increase available workforce for local businesses and ensure greater economic mobility for working families.
- Action 1.1.5** Work with Sandy Area Metro (SAM) to identify opportunities to align transportation services, including through route planning, to improve access to assets and programs described above.



## Strategy 1.2: Expand Job training and wraparound services for youth and disadvantaged workers

**Action 1.2.1** Expand on job training, financial guidance, and assistance programs to remove barriers to economic opportunity for youth and other priority communities.

**Action 1.2.2** Enhance the career path into metal fabrication sectors by investigating the feasibility of a program with US Metal Works, Northwest Technologies, and / or other metal fab firms in and around Sandy, and Sandy High School and Mount Hood Community College to route middle and high school students to metal fab training, apprenticeships, and jobs.

**Action 1.2.3** Tailor youth and adult workforce training to skills and workforce gaps among nearby health service providers and low-barrier industries that support service needs in Sandy that can create career pathways for local youth and disadvantaged workers.

## **goal 2** Leverage our investments in technology to maximize economic benefits.

### **Strategy 2.1: Foster entrepreneurship and drive new business creation**

**Action 2.1.1** Develop "third place" options or programs, such as city-sponsored meet-ups, for entrepreneurs to connect and share information.

**Action 2.1.2** Expand link between areas schools and advanced technology and business management training programs.

### **Strategy 2.2: Invest in broader awareness and utility of SandyNet and other resources and amenities that support and attract home-based workforce**

**Action 2.2.1** Assess conditions or "audit" SandyNet as a resource in business and talent attraction to make Sandy a destination for telecommuters to live in. Identify gaps, upgrades, and opportunities for expansion in new development areas.

**Action 2.2.2** Identify partnerships with economic development partners in East Clackamas County and the Greater Portland region to develop and distribute marketing collateral communicating the benefits of SandyNet to remote workers and other target audiences.

**Action 2.2.3** Identify essential amenities and resource needs to ensure Sandy can retain and attract Oregon's growing workforce that is remote, home-based.

# goal 3

Build on our businesses and workers in manufacturing to establish Sandy as a destination for metals fabrication and related activities.

## Strategy 3.1: Support and identify opportunities for business expansion among strong base of metals fabrication industries

**Action 3.1.1** Establish an informal quarterly forum for area metal fabrication businesses to share industry-specific retention and expansion needs.

## Strategy 3.2: Carve a niche in subsectors of metals fabrication specific to outdoor equipment and tool manufacturing and other unique regional assets

**Action 3.2.1** Collaborate with the private sector and other regional economic development organizations to host a summit or convention in Sandy for local metal fabrication and related businesses to opportunities in outdoor equipment, tool manufacturing, mass timber components and other unique regional assets.

**Action 3.2.2** Identify opportunity sites for both expansion and recruitment of metals fabrication and outdoor tool manufacturing and equipment providers within the urban growth boundary (UGB) that may be available via annexation in the future.

**Action 3.2.3** Establish marketing to support alignment between area metal fabrication industries and outdoor gear and apparel.

# goal 4

Cultivate emerging innovators in specialty food and beverage industries and align business development activities with the robust food storage and processing sector of the region.

## **Strategy 4.1: Leverage proximity to nearby produce growers and Fruit Loop to expand cold storage and processing industry**

### **Action 4.1.1**

Identify existing retention and expansion needs among area food processing, produce, and / or cold storage industry activities – especially those paying higher wages or having higher local employment densities – and identify any gaps or opportunities associated with sites in commercially-zoned areas of new development.

## **Strategy 4.2: Expand on Sandy's innovative outlets for food service providers**

### **Action 4.2.1**

Establish a forum for local food service provider businesses to identify key opportunities for contracting with the City, other business expansion activities, and B2B intersects.

### **Action 4.2.2**

Establish alignment between specialty food and beverage entrepreneurs and broader food processing and storage industries associated with nearby produce suppliers and food facilities in nearby areas as well as industrial areas in Troutdale and other parts of Columbia Corridor.

## goal 5 Invest in hospitality and place-based tourism to make Sandy the most active and vibrant basecamp for Mt. Hood area adventures.

### Strategy 5.1: Identify and market opportunity sites for expansion of lodging and supportive retail connected to Mt. Hood vicinity opportunities

**Action 5.1.1** Identify key gaps in lodging options within the Mt. Hood vicinity and investigate feasibility of locating larger scale lodging in expansion areas and smaller, boutique lodging experiences on infill sites within downtown Sandy and Pleasant Street Master Plan area.

**Action 5.1.2** Establish connections with hotel, lodging providers locally and regionally to identify distinct needs (including Mt. Hood Expresss connections to winter sports and mountain biking destinations) associated with securing specific lodging types on specific opportunity sites.

### Strategy 5.2: Establish Sandy as the most active and vibrant basecamp for Mt. Hood area adventures

**Action 5.2.1** Make improvements to lodging, entertainment, food and beverage options that cater to interests and preferences of Mt. Hood visitors that are not met in nearby vicinity.

**Action 5.2.2** Continue to invest in downtown walkability with sidewalk and streetscape improvements as part of Pleasant Street Master Plan to ensure safety and community improvement for residents and approachability for outside visitors.

**Action 5.2.3** Support and highlight ODOT's Transit Vision Around the Mountain work underway to strengthen transit network connections linking the area's outdoor recreation destinations, including Mt. Hood, the Columbia Gorge, and ski resorts in Clackamas and Hood River Counties.

**Action 5.2.4**

Establish stronger presence of marketing specific to Sandy's recreation and accommodation assets to support build out planned community and tourism assets around Sandy (downtown park, Sandy River Park improvements, Pleasant Street, and Sandy Community Campus).

### Strategy 5.3: Expand on local recreation opportunities to establish Sandy as its own destination for area outdoor adventurers

**Action 5.3.1**

In alignment with the Parks Master Plan, identify and pursue opportunities to expand, designate, market, or otherwise improve local bikeways.

**Action 5.3.2**

Connect biking routes from Sandy to the Marmot Dam, Sandy Ridge and Government Camp. Invest in signage and facility improvements for a long-distance bikeway route off of US26 between downtown Sandy, Sandy Ridge, and extending to other trails and bikeway destinations (where appropriate) to improve access for cyclists and encourage extended visitation in Sandy.

**Action 5.3.3**

Improve signage and marketing of Meinig Memorial Park and Mt. Hood Scenic Byway - Jonsrud Viewpoint to leverage it more fully as a tourist attraction.

**Action 5.3.4**

Implement existing plans to establish downtown park, bicycle recreation assets, and formalize the entrypoint to Sandy River Park as part of parks development proposals.

**Action 5.3.5**

Connect Tickle Creek Trail to Cazadero Trail and other extensions to regional trails.

**Action 5.3.6**

Explore completion of a proposed trail system that may include formal pathway construction as well as informal, sidewalk trail extensions to form an 8-10-mile loop around the city that can be marketed as a connecting network between existing park and trail assets.

# goal 6 Be a leader as both retail hub and heart of East Clackamas County.

## Strategy 6.1: Leverage undeveloped areas to support larger retail business expansion

- Action 6.1.1** Secure large, anchor retail business to the 362nd and Bell St. area, or otherwise align recruitment activities with long term plans for the area.
- Action 6.1.2** Commission a new retail market analysis to determine specific targets appropriate for the expansion of Sandy's retail business sector with focus on Pleasant Street and newly developing areas.
- Action 6.1.2** Assess feasibility of recruitment of major outdoor equipment or apparel establishment to align with sub-sector development for outdoor tool and equipment manufacturing with a focus on areas of Sandy expected to redevelop in the near future.

## Strategy 6.2: Expand small downtown retail opportunities as part of Pleasant Street Master Plan and infill of underutilized sites

- Action 6.2.1** Leverage underutilized sites (including Muff property on Pleasant and Strauss, old lumberyard property, and current Sandy Community Campus site) and development proposals as part of Pleasant Street Master Plan to support expansion of existing retailers and recruitment of smaller scale retailers in region seeking to expand.

## **Strategy 6.3: Focus business attraction on experiential retail and retail options that can sidestep competition with online shopping**

### **Action 6.3.1**

Targeted recruitment of retail businesses based on demand in Sandy and nearby Estacada, Molalla and other E. Clackamas County communities.



# CHAPTER 4

## Implementation

# 1 Improve systems to ensure broad and durable access to economic opportunity and maintain Sandy's high quality of life.

## 1.1 Improve access to health care, child care, job training, and assistance programs

Strategy	Lead Organization	Supporting Organizations	Priority
1.1.1 Expansion of local health care facilities that ensure health services	Adventist Health Portland, Legacy Medical Group, Sandy Health Center, El Hospital Del Calzado, Providence, Kaiser Permanente	City of Sandy	Medium
1.1.2 Best practices in expanding health care services in non-metropolitan settings	City of Sandy	Adventist Health Portland, Legacy Medical Group, Sandy Health Center, El Hospital Del Calzado, Providence, Kaiser Permanente	Medium
1.1.3 Resources and positioning to attract qualified health care workers	City of Sandy	Adventist Health Portland, Legacy Medical Group, Sandy Health Center, El Hospital Del Calzado, Providence, Kaiser Permanente	Low
1.1.4 Access to child care facilities	City of Sandy	AntFarm Youth Services, Clackamas Workforce Partnership	High

## Implementation Metrics

- Metric 1a: Percent uninsured (health insurance)** (U.S. Census ACS)
- Metric 1b: Count of childcare workers, and home health aides** (U.S. Census ACS)
- Metric 1c: Social services expenditures per capita** (U.S. Census ACS)
- Metric 1d: Labor force participation rate** (U.S. Bureau of Labor Statistics; Census)
- Metric 1e: Unemployment rate** (U.S. Bureau of Labor Statistics)
- Metric 1f: Median income by occupation** (U.S. Census ACS)
- Metric 1g: Open job postings on Indeed.com** (Indeed.com)

**1.2** | Expand Job training and wraparound services for youth and disadvantaged workers

<b>1.2.1</b>	Job training, financial guidance, and assistance programs	Oregon Trail School District	AntFarm Youth Services, Sandy Area Chamber of Commerce, City of Sandy	Medium
<b>1.2.2</b>	Enhance the career path into metals fabrication	Oregon Trail School District	City of Sandy, Mt. Hood and Clackamas Community Colleges, local metals fabrication businesses	High
<b>1.2.3</b>	Tailor workforce training to skills and workforce gaps	Mt. Hood Community College, health care providers such as: Adventist Health Portland, Legacy Medical Group, Sandy Health Center, El Hospital Del Calzado, Providence, Kaiser Permanente	Oregon Trail School District and City of Sandy	High

## 2 Leverage our investments in technology to maximize economic benefits.

### 2.1 Foster entrepreneurship and drive new business creation

Strategy	Lead Organization	Supporting Organizations	Priority	
2.1.1	"Third place" programs for entrepreneurs	City of Sandy	Business Oregon and nearby incubator organizations in Gresham	Medium
2.1.2	Link between areas schools and advanced techand business training programs	Oregon Trail School District, Mt. Hood and Clackamas Community Colleges	City of Sandy, SandyNet Director (Greg Brewster)	Medium

### 2.2 Invest in broader awareness and utility of SandyNet and other resources and amenities that support and attract home-based workforce

2.2.1	Assess SandyNet as a resource in business and talent attraction	City of Sandy Economic Development Office, SandyNet Admin.	Marketing and economic consultants.	High
2.2.2	Economic development partnerships to market SandyNet	City of Sandy Economic Development Office, SandyNet Admin.	Greater Portland Inc., Clackamas County Economic Development Department	High
2.2.3	Essential amenities and resources to retain a remote, home-based workforce	City of Sandy	SACC, GPI and economic development partners.	Medium

## Implementation Metrics

**Metric 2a: Count of total business establishments** (ESRI Business Analyst; D&B Hoovers; Business Licenses)

**Metric 2b: Count of total employment** (U.S. Census LEHD)

**Metric 2c: New business starts and entrepreneur transitions (startup to growth, eg)** (U.S. Census BFS)

**Metric 2d: Number of private sector engagements with local educational institutions** (City of Sandy)

**Metric 2e: Count of SandyNet customers / bandwidth utilization** (SandyNet)

**Metric 2f: Marketing material distribution / page views** (City of Sandy)

**Metric 2g: Count of new business licenses** (City of Sandy)

### 3 Build on our businesses and workers in manufacturing to establish Sandy as a destination for metals fabrication and related activities.

#### 3.1 Support and identify opportunities for business expansion among strong base of metals fabrication industries

Strategy	Lead Organization	Supporting Organizations	Priority
3.1.1 Forum for area metal fabrication businesses	City of Sandy Economic Development Office	Oregon Manufacturing Innovation Center (OMIC), Oregon Manufacturing Extension Partnership (OMEP), local area metal fabrication businesses.	High

#### 3.2 Carve a niche in subsectors of metals fabrication specific to outdoor equipment and tool manufacturing

3.2.1 Host a summit or convention for local metal fabrication and related businesses	City of Sandy, Clackamas County Economic Development Department	Greater Portland Inc., Oregon Manufacturing Innovation Center (OMIC) and Oregon Manufacturing Extension Partnership (OMEP), Estacada Economic Dev.	Medium
3.2.2 Opportunity sites for metals fabrication and outdoor tool manufacturing	City of Sandy, Clackamas County Economic Development Department	Oregon Manufacturing Innovation Center (OMIC) and Oregon Manufacturing Extension Partnership (OMEP)	Medium
3.2.3 Alignment between metal fabrication industries and outdoor gear and apparel.	City of Sandy, Clackamas County Economic Development Department	Greater Portland Inc.? Clackamas County Business and Economic Development (Cyndi Moore)	Low

## Implementation Metrics

**Metric 3a: Count of new business establishments by industry** (ESRI; D&B Hoovers; City of Sandy)

**Metric 3b: Revenue growth by establishment in metals** (ESRI; D&B Hoovers)

**Metric 3c: Business retention & expansion visits** (City of Sandy)

**Metric 3d: Leads generated in target industry companies** (City of Sandy)

**Metric 3e: Growth in livable wage employment occupations** (U.S. Bureau of Labor Statistics)

**Metric 3f: Growth in target sector firms, employment, and wages** (U.S. Census LEHD)

## 4 Cultivate emerging innovators in specialty food and beverage industries and align business development activities with the robust food storage and processing sector of the region.

<b>4.1</b>	Leverage proximity to nearby produce growers and Fruit Loop to expand cold storage and processing industry			
<b>4.1.1</b>	Opportunities and needs of food processing, produce, and cold storage	City of Sandy	Everfresh Fruit Company administration	Medium
<b>4.2</b>	Expand on Sandy's innovative outlets for food service providers			
<b>4.2.1</b>	Forum for local food service provider businesses	SACC, Oregon Restaurant and Lodging Association (ORLA)	City of Sandy, Sandy Area Chamber of Commerce	Medium
<b>4.2.2</b>	Alignment between specialty entrepreneurs and food industries	City of Sandy	Sandy Commissary Kitchen, Sandy Area Chamber of Commerce	Medium

### Implementation Metrics

**Metric 4a:** Count of new business establishments by industry (ESRI; D&B Hoovers; City of Sandy)

**Metric 4b:** Revenue growth by establishment in food & beverage (ESRI; D&B Hoovers)

**Metric 4c:** Business retention & expansion visits (City of Sandy)

**Metric 4d:** Leads generated in target industry companies (City of Sandy)

**Metric 4e:** Growth in livable wage employment occupations (U.S. Bureau of Labor Statistics)

**Metric 4f:** Growth in target sector firms, employment, and wages (U.S. Census LEHD)

## 5 Invest in hospitality and place-based tourism to make Sandy the most active and vibrant basecamp for Mt. Hood area adventures.

**5.1** Identify and market opportunity sites for expansion of lodging and supportive retail connected to Mt. Hood vicinity opportunities

Strategy	Lead Organization	Supporting Organizations	Priority
<b>5.1.1</b> Gaps in lodging options	City of Sandy, SACC	Existing and prospective lodging businesses	High
<b>5.1.2</b> Build connections to identify distinct needs	City of Sandy, SACC	Hoteliers, hiking and mountain biking groups	Medium
<b>5.2</b> Establish Sandy as the most active and vibrant basecamp for Mt. Hood area adventures			
<b>5.2.1</b> Improve hospitality options	City of Sandy, SACC	Existing and prospective lodging businesses	Medium
<b>5.2.2</b> Invest in downtown walkability	City of Sandy	ODOT, City of Sandy Development Services Department	High
<b>5.2.3</b> Transit network connections for outdoor rec	City of Sandy Ec Dev Office, City of Sandy Transit Dept, Clackamas County	ODOT Public Transportation, Travel Oregon	Medium
<b>5.2.4</b> Outdoor recreation marketing	City of Sandy	SACC, Travel Oregon, other nearby chambers and tourist brochure producers, Clackamas County Tourism & Cultural Affairs	High

### Implementation Metrics

- Metric 5a: Growth of transient lodging tax revenue** (Clackamas County)
- Metric 5b: Growth in number of lodging & hospitality business / TLT / liquor licenses** (City of Sandy; Clackamas)
- Metric 5c: Growth in retail sales per capita** (Oregon Office of Economic Analysis)
- Metric 5d: Local recreation amenities messaging partnerships** (City of Sandy)
- Metric 5e: Net expansion of recreation infrastructure / facilities (eg, number of trail miles)** (City of Sandy)
- Metric 5f: Increased recreation / facilities spending** (City of Sandy)
- Metric 5g: Estimated/observed visitation at recreation sites** (U.S. Forest Service; City of Sandy; Clackamas County)
- Metric 5h: Highway 26 traffic counts** (Oregon Department of Transportation)
- Metric 5i: Hotel occupancy rates and REVPAR (revenue per available room) trends** (City of Sandy; Clackamas)

**5.3** | Expand on local recreation opportunities to establish Sandy as its own destination for area outdoor adventurers

<b>5.3.1</b>	Expand local bikeways	City of Sandy, City of Sandy Parks & Recreation Dept	Oregon Metro, ODOT	Medium
<b>5.3.2</b>	Bike route connectivity	City of Sandy, City of Sandy Parks & Recreation Dept	Bureau of Land Management, Clackamas County (Tourism and Economic Development)	Medium
<b>5.3.3</b>	Meinig and Jonsrud Viewpoint marketing	City of Sandy, City of Sandy Parks & Recreation Dept	PGE, Travel Oregon	Low
<b>5.3.4</b>	Implement existing multi-modal transit plans	City of Sandy, City of Sandy Parks & Recreation Dept	Partner agencies and funding partners	High
<b>5.3.5</b>	Connect Tickle Creek Trail to Cazadero Trail	City of Sandy, City of Sandy Parks & Recreation Dept, Clackamas County Tourism & Cultural Affairs	Metro, City of Sandy Parks & Recreation Department	Medium
<b>5.3.6</b>	Sandy Hiking Loop extension	City of Sandy, City of Sandy Parks & Recreation Dept	City of Sandy Parks & Recreation Department	Medium



## 6 Be a leader as both retail hub and heart of East Clackamas County.

### 6.1 Leverage undeveloped areas to support larger retail business expansion

Strategy	Lead Organization	Supporting Organizations	Priority
6.1.1 Anchor retail in 263rd and Bell St. area	City of Sandy	Consultant support and retail businesses	Medium
6.1.2 Pleasant Street retail market analysis	City of Sandy	Consultant support, Sandy Area Chamber of Commerce	High
6.1.3 Feasibility and alignment of major outdoor company	City of Sandy	Prosper Portland, GPI, CREDC, Washington County	Medium
6.2 Expand small downtown retail opportunities as part of Pleasant Street Master Plan and infill of underutilized sites			
6.2.1 Leverage underutilized sites and proposals as part of Pleasant Street Master Plan	City of Sandy	Consultant support, property owners, City of Sandy Development Services Dept	High
6.3 Focus business attraction on experiential retail and retail options that can sidestep competition with online shopping			
6.3.1 East Clackamas County retail recruitment	City of Sandy	Marketing consultants	Medium

## Implementation Metrics

**Metric 6a: Growth in retail sales per capita by category** (U.S. Census ACS)

**Metric 6b: Retail sales as a percent of personal income** (U.S. Census ACS)

**Metric 6c: Value of commercial property** (Clackamas County Assessor)

**Metric 6d: Count of tourist visitation** (Clackamas County TDC)

**Metric 6e: Retail gap analysis** (Oregon Office of Economic Analysis)

**Metric 6f: Dollars spent in local establishments / revenue.** (ESRI; D&B Hoovers)

# CHAPTER 5

## Appendix

# LANDSCAPE ASSESSMENT

## Planning & Policy Context

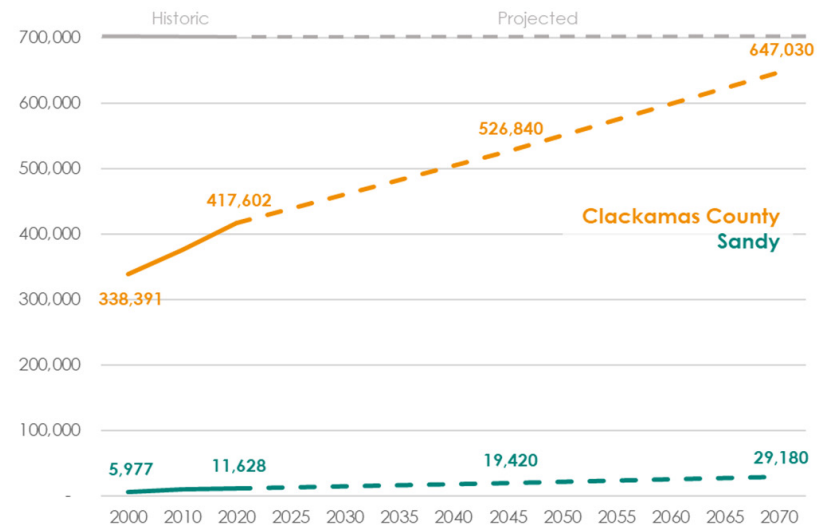
Localized planning aligns with Clackamas County's focus on broad-based business expansion with a strategic investment in industrial and commercial development consistent with area resident needs and other objectives for community livability and environmental quality.

**SANDY WILL DOUBLE ITS POPULATION BY 2050 AND REACH A POPULATION OF 29,180 BY 2070. IT IS ESTIMATED TO ADD BETWEEN 2,000 AND 2,500 NEW JOBS AND CLOSE TO 3,000 NEW PEOPLE BY 2043.**



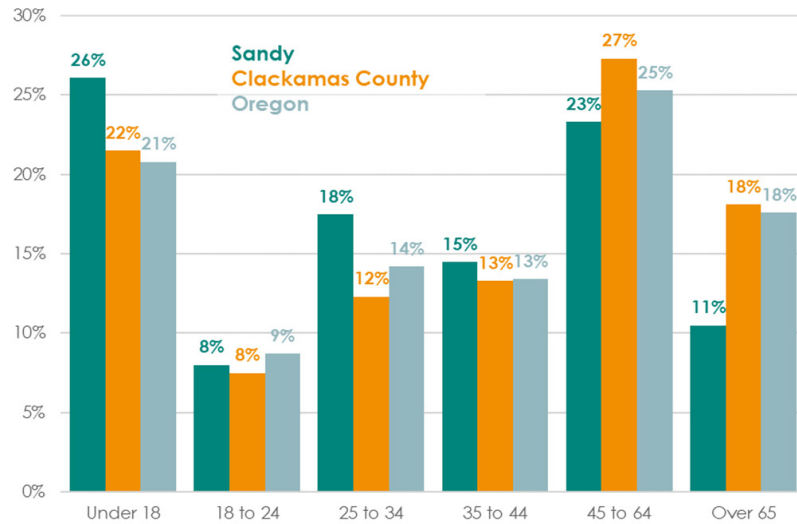
## Demographic Conditions

Historic and Projected Population, Clackamas County, 2000-2070



Source: Portland State University Population Research Center, 2020; CAI, 2022.

Age of Residents, Sandy and Clackamas County, 2020



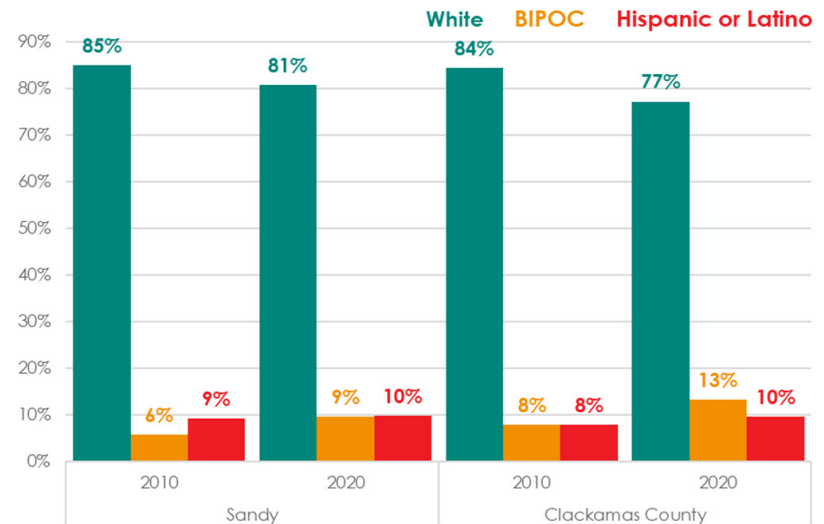
Source: ACS, 2010, 2020; CAI, 2022.

**SANDY HAS AN AGING POPULATION, BUT THE MEDIAN AGE IS LOWER THAN CLACKAMAS COUNTY AND OREGON.**



Race and Ethnicity of Residents, Sandy and Clackamas County, 2010 and 2020

**THE BIPOC POPULATION IN SANDY IS GROWING AT A FASTER RATE THAN CLACKAMAS COUNTY, CHANGING FROM 6% TO 9% OF THE POPULATION OVER THE LAST TEN YEARS.**



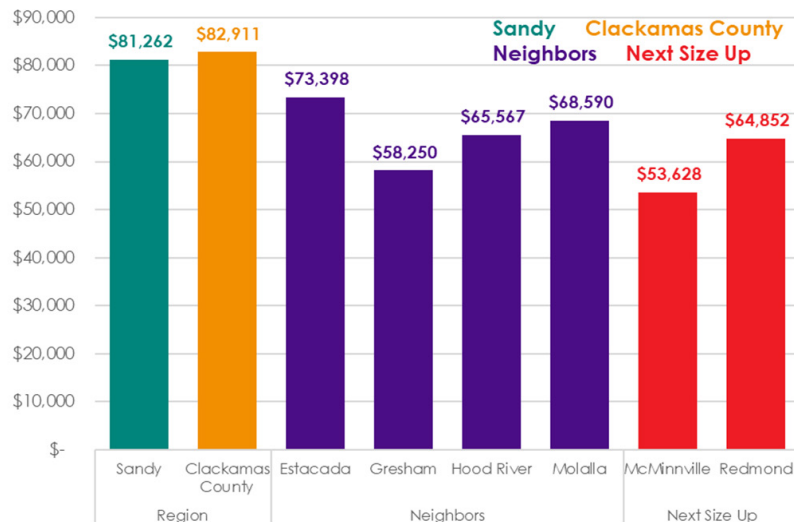
Source: ACS, 2010, 2020; CAI, 2022.

# Economic Indicators

Economic indicators refer to data on jobs that are based in Sandy or the region. Workers in these jobs commute from across the region and state. Data that refers to workers or job numbers in this section include, but are not limited to, workers who live in Sandy.

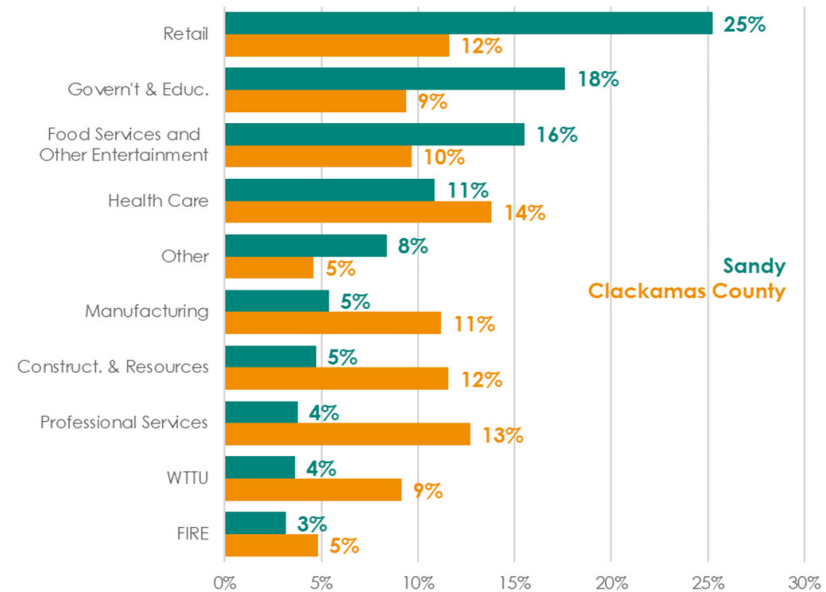
**SANDY'S LARGEST INDUSTRY IS RETAIL, WHICH ACCOUNTS FOR ONE-QUARTER OF ALL JOBS.**

Median Resident Income, Sandy and Clackamas County, 2020



Source: LEHD, 2019, 2020; CAI, 2022.

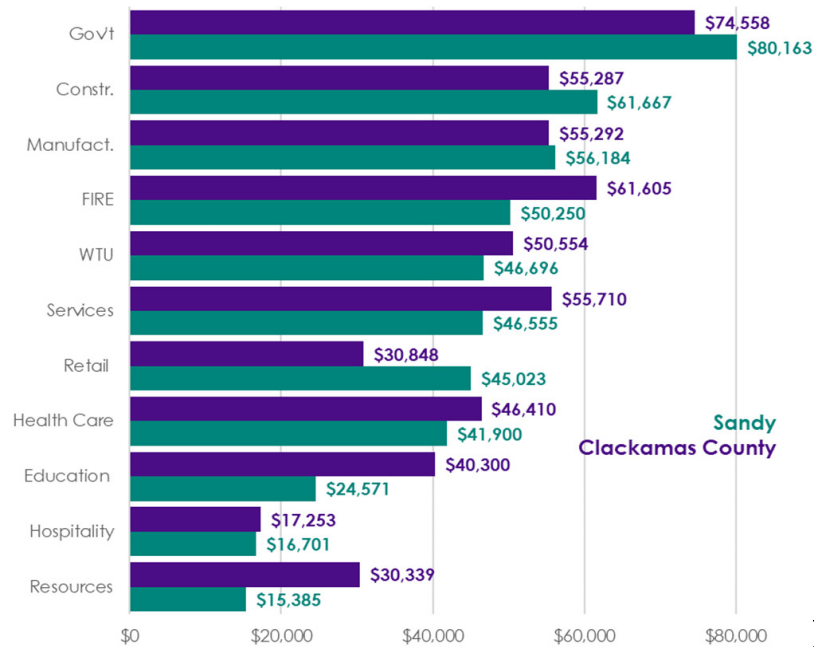
Employment by Industry, Sandy and Clackamas County, 2019 (Metric 3f, 4f)



Source: LEHD, 2019, 2020; CAI, 2022.

**SANDY'S MEDIAN INCOME (\$81,262) IS SLIGHTLY LOWER THAN CLACKAMAS COUNTY (\$82,911), BUT IT IS HIGHER THAN COMPARABLE NEIGHBORING CITIES AND CITIES OF THE NEXT SIZE UP (RANGING FROM \$58,250 TO \$73,400).**

Median Workforce Income by Industry, Sandy and Clackamas County, 2020



Source: ACS, 2020; CAI, 2022.

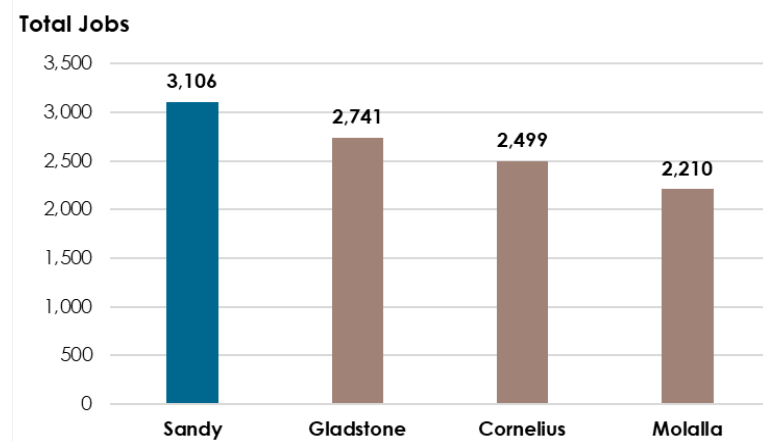


**GOVERNMENT JOBS PAY THE HIGHEST MEDIUM WAGE IN SANDY, WHILE THE LOWEST WAGES ARE IN THE HOSPITALITY AND NATURAL RESOURCES INDUSTRIES (RANGING FROM \$15,400 TO \$16,700).**

**SANDY AND CLACKAMAS COUNTY HAVE MANY OF THE SAME SECTORS REPRESENTED AMONG THEIR LARGEST EMPLOYERS.**



Total Employment, Sandy and Selected Comparison Cities, 2018 (Metric 2b)



Source: U.S. Census LEHD, 2018; CAI, 2022.

Major Employers, Clackamas County, 2022

Rank	Company	Employees	Sector	HQ
1	KinderCare Education	1,500	Education	Yes
2	NAVEX Global	1,000	Software-IT	Yes
3	Siemens EDA	1,000	Computers & Electronics	
4	Unosquare	768	Software-IT	Yes
5	Oregon Tool	700	Athletic & Outdoor	
6	The Greenbrier Companies	651	Manufacturing	Yes
7	TE Connectivity	601	Computers & Electronics	
8	Swire Coca-Cola	600	Food & Beverage	
9	Sysco	600	Food & Beverage	
10	Xerox Corporation	600	Computers & Electronics	
11	Micro Systems Engineering	550	Bioscience	Yes
12	Bob's Red Mill	500	Food & Beverage	Yes
13	Logical Position	405	Design and Media	Yes
14	Aldrich Group	377	Financial Services	Yes
15	Benchmade	359	Athletic & Outdoor	Yes
16	Teledyne Flir Systems	350	Manufacturing	Yes
17	ESS, Inc.	250	Climate Tech	
18	I&E Construction	219	Construction	Yes

Source: Portland Business Journal, Oregonian, local municipalities, LinkedIn, Greater Portland Inc., 2022; CAI, 2022.

## Major Employers, City of Sandy, 2022

Rank	Company	Sector
1	Oregon Trail School District	Education
2	Safeway Stores Inc.	Food & Beverage
3	US Metal Works Inc.	Metals &
4	Quality Tank Construction	Metals &
5	Web Steel Buildings NW	Metals &
6	G&L Screw Machine	Metals &
7	Konnel Construction	Construction
8	Firwood Medical Center	Health Care
9	Eclectic Institute Lab	Health Care
10	Suburban Ford	Automotive
11	Fred Meyer	Food & Beverage

Source: Clackamas County, 2022; CAI, 2022.

## Workforce Indicators

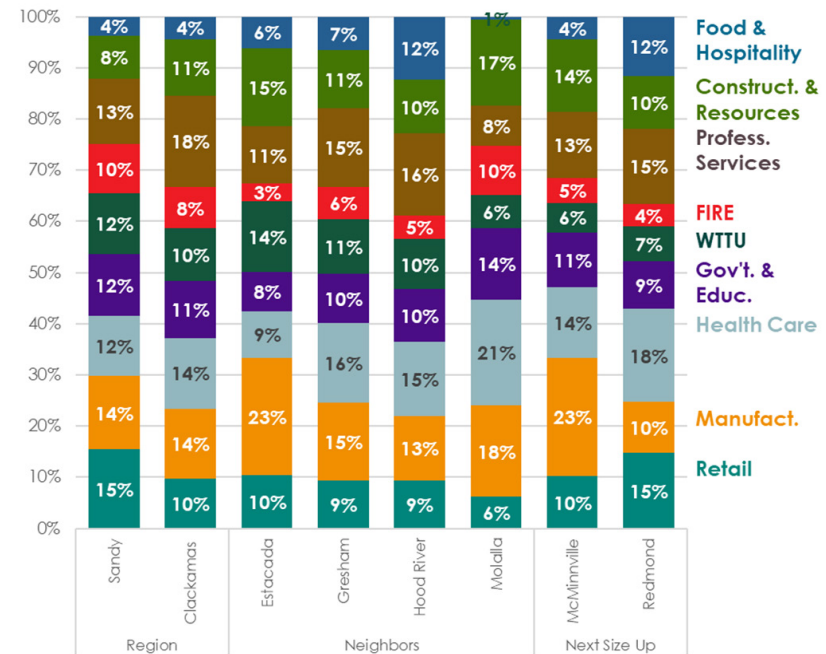
Workforce indicators refers to job numbers and industries of workers who live in Sandy. A portion of these jobs employ workers that live and work in the city, but data in this section will also refer to jobs across the county and region held by Sandy residents.

**SANDY'S RESIDENTS ARE EMPLOYED BY A DIVERSE SET OF INDUSTRIES WITH A SLIGHTLY HIGHER SHARE WITH JOBS IN RETAIL (15%), MANUFACTURING (14%), AND PROFESSIONAL SERVICES (13%).**



**MAJOR EMPLOYERS OF SANDY SPAN SIX INDUSTRIES: AUTOMOTIVE, CONSTRUCTION, EDUCATION, FOOD & BEVERAGE, HEALTH CARE, AND METALS & MACHINERY.**

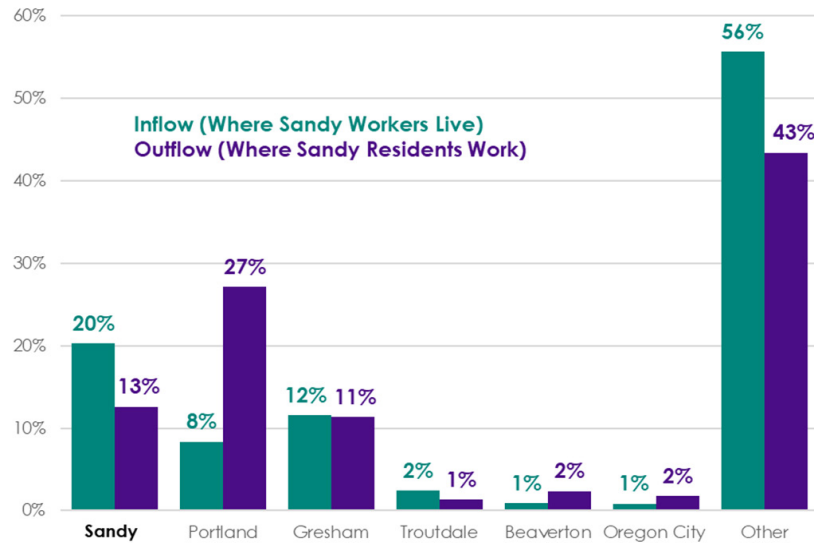
Resident Job Share by Industry, Sandy and Comparison Cities, 2020



Source: ACS, 2020; CAI, 2022.



### Top Destinations and Origins, Sandy, Clackamas County and Region, 2019



Source: U.S. Census LEHD, 2019; CAI, 2022.



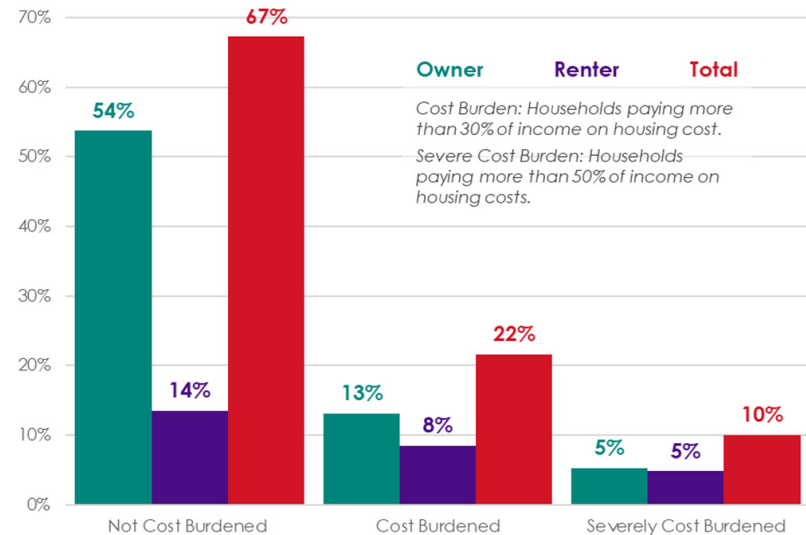
**OVER A QUARTER OF SANDY'S RESIDENTS COMMUTE TO WORK IN PORTLAND (27%), WHILE A SMALLER PORTION REMAIN IN SANDY (13%) OR COMMUTE TO GRESHAM (11%).**

## Housing Conditions

**ABOUT ONE THIRD OF SANDY'S RESIDENTS ARE EITHER COST-BURDENED (22%) OR SEVERELY COST-BURDENED (10%) WITH A HIGH SHARE THAT ARE HOMEOWNERS (18%) AND A SOMEWHAT LOWER SHARE THAT ARE RENTERS (13%).**



### Share of Cost Burdened Households, Sandy, 2015-2019



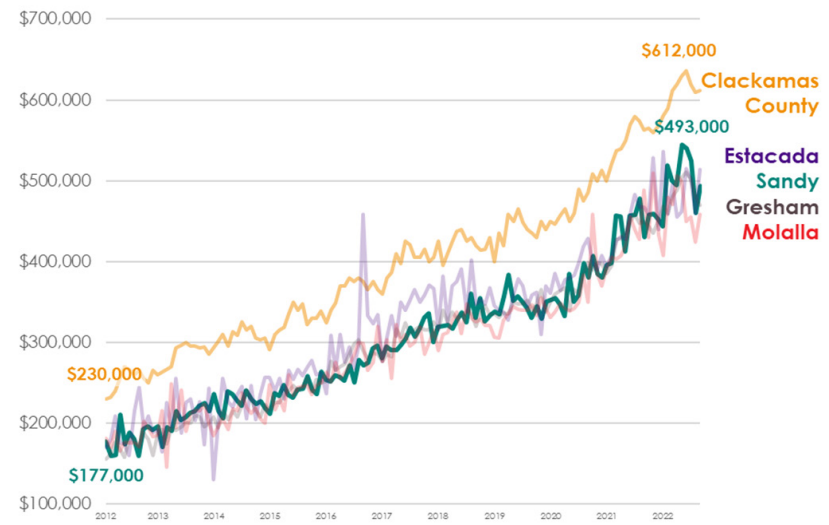
Source: HUD CHAS, 2015-2019; CAI, 2022.



**MEDIAN HOME SALE PRICES IN SANDY (\$493,000) ARE MORE AFFORDABLE THAN CLACKAMAS COUNTY (\$612,000) AND SIMILAR TO NEARBY GRESHAM, MOLALLA, AND ESTACADA.**



Median Home Sale Price, Sandy and Clackamas County, 2012-2022

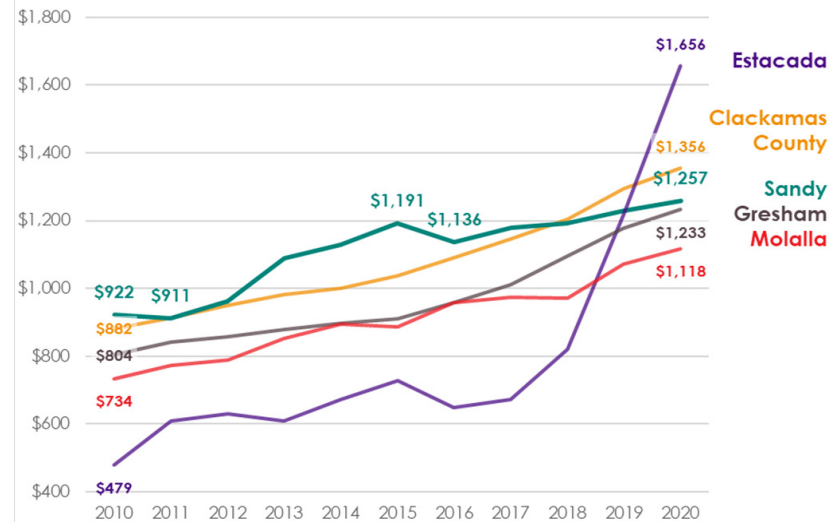


Source: Redfin, 2012-2022; CAI, 2022.

**MEDIAN RENTS IN SANDY ARE LESS AFFORDABLE THAN MOLALLA AND MORE AFFORDABLE THAN BOTH ESTACADA AND CLACKAMAS COUNTY AS A WHOLE - ESSENTIALLY THE SAME AS GRESHAM AT ABOUT \$1,250 PER MONTH**

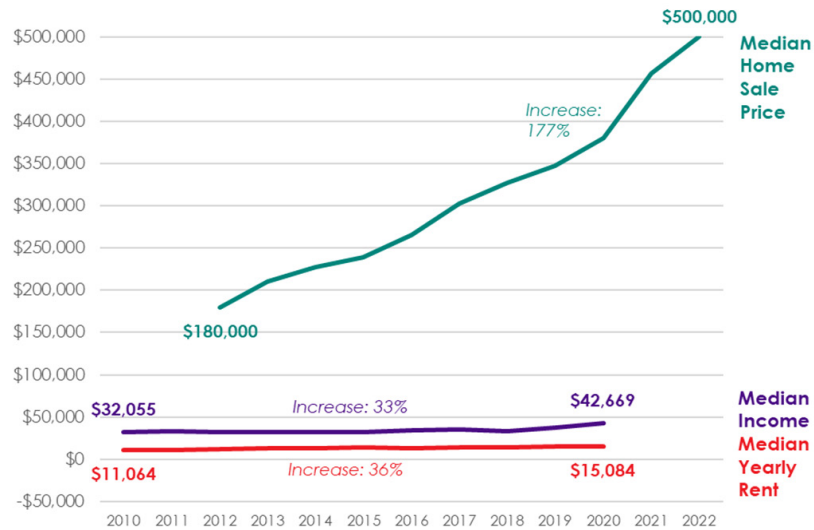


Median Rent, Sandy and Region, 2010-2020



Source: ACS, 2010-2020; CAI, 2022.

### Housing Costs and Income Change, Sandy, 2010 to 2022



Source: Redfin, 2022; ACS, 2010-2020; CAI, 2022.



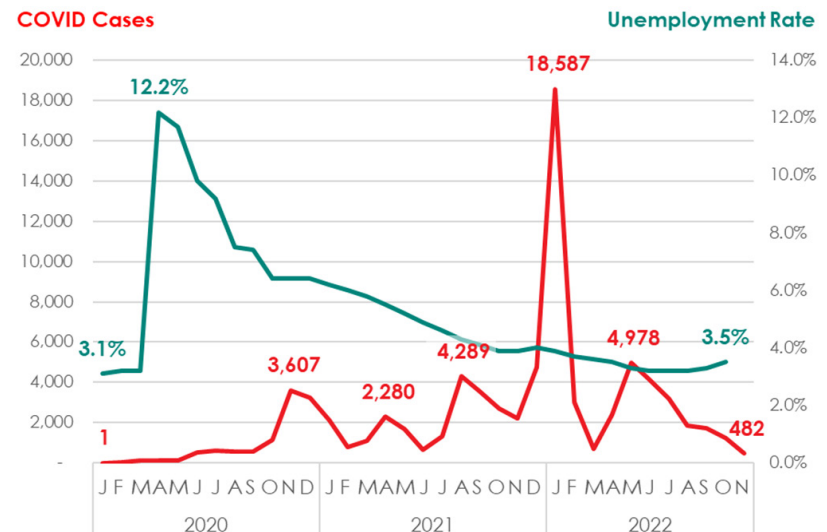
**MEDIAN INCOME HAS INCREASED AT ALMOST THE SAME RATE AS THE RISE OF MEDIAN YEARLY RENT, BUT HOMEOWNERSHIP IS BECOMING UNATTAINABLE AS INC.N SALES PRICE INCREASES**

## Covid-19 Impacts

**UNEMPLOYMENT IN CLACKAMAS COUNTY RETURNED TO NEAR PRE-PANDEMIC LEVELS IN LATE 2022 AS COVID CASES SPIKED AND THEN DECREASED TO BELOW SUMMER 2020 LEVELS.**



### Unemployment Rate and Positive COVID-19 Tests by Week, Clackamas County, January 2020-November 2022 (Metric 1e)



Source: Oregon Health, 2020; WA ESD, 2022; CAI, 2022.

# Industry Clusters

The existing and historic performance of specific industry clusters can inform planning and programming of site development investment priorities, investments in infrastructure and other industry supports. This section provides background research on high-performing industry clusters in the City of Sandy and Clackamas County, and an analysis of specific target industries identified for further investigation.

Key sectors and industries that are relevant to Sandy have been elevated by county and regional economic and workforce development organizations:

**DESIGN AND MEDIA; METALS AND MACHINERY; OTHER MATERIALS MANUFACTURING; FOOD AND BEVERAGE; APPAREL AND OUTDOOR; HEALTH CARE; AND WHOLESALE TRADE, TRANSPORT, AND DISTRIBUTION.**



Key Sectors and Industries	Metro CEDS	GPI CEDS	WSI Key Sectors	Clackamas County Emerging Trends	Sandy EOA
<b>Technology</b>					
Software	Yes	Yes		Yes	
Design & Media	Yes	Yes		Yes	Yes
Computer & Electronics	Yes	Yes			
Climate Tech	Yes	Yes			
Tech			Yes	Yes	
<b>Manufacturing</b>					
Metals & Machinery	Yes	Yes		Yes	Yes
Advanced Manufacturing			Yes	Yes	
Other Materials Manufacturing				Yes	Yes
<b>Services</b>					
Food & Beverage	Yes	Yes		Yes	Yes
Apparel & Outdoor	Yes	Yes			Yes
Health Care			Yes	Yes	Yes
Professional Business Services				Yes	
<b>Other</b>					
Wholesale Trade, Transport., & Distribution				Yes	Yes
Construction			Yes		
Agriculture, Nurseries & Greenhouses				Yes	

Sources: Oregon Metro, 2021; Greater Portland, Inc., 2021; Work Systems Inc., 2022; Clackamas County, 2022; ECONorthwest, 2022; CAI, 2022.

# Findings

## Demographic Conditions

- Sandy will double its population by 2050 and reach a population of 29,180 by 2070. It is estimated to add between 2,000 and 2,500 new jobs and close to 3,000 new people by 2043.
- The BIPOC population in Sandy is growing at a faster rate than Clackamas County, changing from 6% to 9% of the population over the last ten years.

## Economic Indicators

- Sandy's largest industry is retail, which accounts for one-quarter of all jobs.
- Sandy's median income (\$81,262) is slightly lower than Clackamas County (\$82,911), but it is higher than comparable neighboring cities and cities of the next size up (ranging from \$58,250 to \$73,400).
- Government jobs pay the highest median wage in Sandy (ranging from \$74,600 to \$80,200), while the lowest wages are in the Hospitality and Natural Resources industries (ranging from \$15,400 to \$16,700).

- Sandy and Clackamas County have many of the same sectors represented among their largest employers.
- Major employers of Sandy span six industries: Automotive, construction, education, food & beverage, health care, and metals & machinery.

## Workforce Indicators

- Sandy's residents are employed by a diverse set of industries with a slightly higher share with jobs in Retail (15%), Manufacturing (14%), and Professional Services (13%).
- Over a quarter of Sandy's residents commute to work in Portland (27%), while a smaller portion remain in Sandy (13%) or commute to Gresham (11%).

## Housing Conditions

- About one third of Sandy's residents are either cost-burdened (22%) or severely cost-burdened (10%) with a high share that are homeowners (18%) and a somewhat lower share that are renters (13%).

- Median home sale prices in Sandy (\$493,000) are more affordable than Clackamas County (\$612,000) and similar to nearby Gresham, Molalla, and Estacada.
- Median rents in Sandy are less affordable than Molalla and more affordable than both Estacada and Clackamas County as a whole - essentially the same as Gresham at about \$1,250 per month.

- Retail and Services; Tourism and Recreation; Health Care and Social Assistance; Remote Work and Office Using Employment; Metals and Fabrication Industries; Specialty Food and Beverage; and Clean Tech industries have been identified for further investment based on cluster analysis, demographic and site conditions, and community and city engagement.

## **COVID-19 Impacts**

- Unemployment in Clackamas County returned to near pre-pandemic levels in late 2022 as COVID cases spiked and then decreased to below Summer 2020 levels.

## **Industry Clusters**

- Key sectors and industries that are relevant to Sandy have been elevated by county and regional economic and workforce development organizations: Design and Media; Metals and Machinery; Other Materials Manufacturing; Food and Beverage; Apparel and Outdoor; Health Care; and Wholesale Trade, Transport, and Distribution.





## Staff Report

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**Meeting Date:** June 5, 2023  
**From** Ernie Roberts, Police Chief  
**SUBJECT:** IGA City of Sandy/City of Lake Oswego (LOCOM)

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**DECISION TO BE MADE:**

Whether to authorize the City Manager to sign an intergovernmental agreement for after hours record entry services.

**BACKGROUND / CONTEXT:**

Prior to 2020, the Clackamas County Sheriff's Office provided after hours record entry services for the City of Sandy. After the County made the decision to discontinue providing this service, the City entered into an intergovernmental agreement (IGA) with the City of Lake Oswego (specifically their dispatch communications service LOCOM) for after hours record entry services, which was [approved by the City Council on March 2, 2020](#). LOCOM provides dispatch services for the City of Lake Oswego, the City of West Linn, and the City of Milwaukie.

The current IGA expires on July 1, 2023. LOCOM has agreed to continue to provide after hours record entry services for the City of Sandy through June 30, 2025, as outlined in the new IGA.

**RECOMMENDATION:**

Authorize the City Manager to sign the IGA between the City of Sandy and the City of Lake Oswego as included in the agenda packet.

**BUDGETARY IMPACT:**

Year one (2023): \$4,900. Year two (2024): \$5,300. These costs have been accounted for in the BN 2023-25 budget.

**SUGGESTED MOTION LANGUAGE:**

"I move to authorize the City Manager to sign the IGA between the City of Sandy and the City of Lake Oswego as included in the agenda packet."

**LIST OF ATTACHMENTS/EXHIBITS:**

- Intergovernmental Agreement

**INTERGOVERNMENTAL AGREEMENT**

**PUBLIC SAFETY COMMUNICATIONS SERVICES**

THIS AGREEMENT is made and entered into by and between the CITY OF LAKE OSWEGO, an Oregon municipal corporation (hereinafter "Lake Oswego"), and the CITY OF Sandy, an Oregon municipal corporation ( hereinafter "Sandy").

**WITNESSETH:**

**RECITALS**

1. Lake Oswego operates through its Police Department, Communications Division, a public safety dispatching facility (hereinafter "LOCOM") to provide public safety dispatching services to fire and police departments of Lake Oswego, and the City of West Linn and City of Milwaukie police departments.
2. The parties to this Agreement desire for LOCOM to also provide warrant confirmation and associated limited information entries to the state and national law enforcement database systems for the City of Sandy.
3. The parties acknowledge that they have authority to execute this cooperative intergovernmental agreement pursuant to the terms of their respective municipal charters and pursuant to ORS 190.010.

NOW THEREFORE, it is agreed by and between the parties hereto as follows:

1. Description of Services to be Provided. Lake Oswego, through LOCOM, shall provide warrant confirmation and limited state and national law enforcement database system entry services through the Law Enforcement Data System (hereinafter LEDS) and the National Crime Information Center (hereinafter NCIC) for Sandy Police Department for the period of July 1, 2023, through June 30, 2025, as outlined on the attached Exhibit A.
  - a. All days and hours, LOCOM will confirm warrants. Sandy will provide LOCOM original physical copies of Municipal Warrants.
  - b. Weekdays between 5:00 pm and 8:00 am and on weekends and holidays, LOCOM will enter and/or remove priority information from LEDS and NCIC databases as set forth in Exhibit A.
  - c. LOCOM is a public safety answering point, and must prioritize those duties. The database system entries subject to this agreement are a lower priority, as outlined on Exhibit A. Best efforts will be made to complete warrant confirmation in the LEDS/NCIC required timelines.
  - d. LOCOM is authorized to utilize Sandy Police Department's Originating Agency Identifier (ORI) to execute these transactions.
  - e. LOCOM will develop protocols for the database entry and the confirmation process, along with any other necessary protocols to ensure accurate and timely transactions. Sandy must agree in writing to the protocols before services under this agreement commence.
  - f. LOCOM will take all reasonable and necessary steps to ensure that its services under this Agreement are provided in a manner that follow current Criminal Justice Information Security policies and procedures and/or other applicable State and/or Federal laws.
2. Control. The manner of LOCOM's performance of LEDS/NCIC services, including but not limited to the establishment of standards of personnel performance, the hiring, supervision and discipline of LOCOM employees, and all other matters incident to LOCOM 's performance of such services shall be under the exclusive authority of Lake Oswego.



3. Obligation of Lake Oswego to Provide Labor and Equipment. Lake Oswego shall provide personnel with required qualifications to make national and state database entries, supervision, equipment and supplies necessary to maintain the services to be rendered under this Agreement.
4. Obligation of Both Parties. Each party shall give the other immediate written notice of any action or suit filed or any claim made against that party in any way related to this Agreement.
5. Consideration. Sandy shall pay Lake Oswego as set forth for Sandy in Exhibit B, with the first payment within 30 days of this Agreement being executed, and the second year's payment within 30 days of the first anniversary of this Agreement.
6. Indemnity and Hold Harmless. Subject to the limitations of the Oregon Tort Claims Act ORS 30.260 *et. seq.*, and the Oregon Constitution:
  - a. Except to the extent caused by the acts or omissions of Sandy or its officers, agents and employees, Lake Oswego hereby covenants and agrees to defend, indemnify and hold Sandy and its officers, agents, and employees harmless from all liability, claims, actions or judgments to the proportionate extent caused by or resulting from any negligent act or omission of Lake Oswego or its officers, agents and employees in the performance of the duties to be performed by Lake Oswego under the terms of this Agreement. (Employees of LOCOM shall be deemed to be employees of Lake Oswego not as agents or employees of Sandy.)
  - b. Except to the extent caused by the acts or omissions of Lake Oswego, its officers, agents or employees, Sandy hereby covenants and agrees to defend, indemnify and hold Lake Oswego and its officers and employees harmless from all liability, claims, actions or judgments to the proportionate extent caused by or resulting from any act or omission of Sandy, its agents, officers, and employees in the performance of its duties under the terms of this Agreement or relating in any way to this Agreement, including without limitation the accuracy or timelines of the information and data provided to LOCOM.The indemnity obligations in this Section 6 shall survive termination or expiration of the Agreement.
7. Insurance. Each party agrees to maintain insurance levels or self-insurance in accordance with ORS 30.282, for the duration of this Agreement at levels necessary to protect against public body liability as specified in ORS 30.269 to 30.274.
8. Termination of Agreement. Lake Oswego may terminate this Agreement at any time for non-payment of any sum when due as required by Section 5 of this Agreement upon 30 days' notice of nonpayment. Otherwise, either party may terminate this agreement effective 180 day after providing written notice of termination to the other party.
9. Non-appropriation. Either party may terminate this Agreement, in whole or in part, upon thirty (30) days' written notice to Sandy, in the event that party fails to receive funding, appropriations or other expenditure authority at levels sufficient to perform the services set forth in this Agreement.
10. Amendment Provisions. The terms of this Agreement may be amended by mutual agreement of the parties. Any amendment shall be in writing, shall refer specifically to this Agreement, and

shall be executed by the parties.

11. Force Majeure. In the event that either party is unable to perform any of its obligations under this Agreement due to natural disaster, acts of war, actions or decrees of governmental bodies, or communications line or power failure extending more than 72 hours, or other unforeseeable circumstances beyond the control of the affected party (hereinafter referred to as a "Force Majeure Event"), the affected party shall immediately give notice to the other Party and shall do everything reasonably possible as determined by the affected party's City Manager or designee under the circumstances to resume performance. If the period of nonperformance exceeds fifteen (15) calendar days from the receipt of notice of the Force Majeure Event, the Party whose ability to perform has not been so affected may, by giving written notice, terminate this Agreement.
12. No Third-Party Beneficiaries. The parties expressly agree that nothing contained in this Agreement shall create any legal right or inure to the benefit of any third party. This Agreement is entered into for the benefit of the Parties. Except as set forth herein, nothing in this Agreement shall be construed as giving any benefits, rights, remedies or claims to any other person, firm, corporation or other entity, including, without limitation, the general public or any member thereof, or to authorize anyone not a party to this Agreement to maintain a suit for breach of contract, personal injuries, property damage, or any other relief in law or equity in connection with this Agreement.
13. Severability. The terms of this Agreement are severable and a determination by an appropriate body having jurisdiction over the subject matter of this Agreement that results in the invalidity of any part, shall not affect the remainder of this Agreement.
14. Remedies, Oregon Law, Dispute Resolution and Forum. The remedies provided under this Agreement shall not be exclusive. The parties shall also be entitled to any other equitable and legal remedies that are available. This Agreement shall be construed according to the laws of the State of Oregon. The parties shall negotiate in good faith to resolve any dispute arising out of this Agreement. If the parties are unable to resolve any dispute within fourteen (14) calendar days, the parties are free to pursue any legal remedies that may be available. Any litigation between the parties arising under this Agreement or out of work performed under this Agreement shall occur, if in the state courts, in the Clackamas County Circuit Court, and if in the federal courts, in the United States District Court for the District of Oregon located in Portland, Oregon.
15. Waiver. The failure of a party to insist upon the strict performance of any of the terms of this Agreement shall not be construed as a waiver or relinquishment of such terms, but the same shall continue and remain in full force and effect. No waiver of any breach of this Agreement shall be held to be a waiver of any other or subsequent breach of this Agreement.
16. Counterparts. This Agreement may be executed in two or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.
17. Integration. This Agreement constitutes the entire Agreement between the Parties and supersedes all prior written or oral discussions, proposals, presentations, understandings or agreements between the Parties on the subject.

18. Notice. Any notice under this Agreement shall be in writing and shall be effective when actually delivered or when deposited in the mail, registered or certified, addressed to the parties as follows:

Lake Oswego: Martha Bennett, City Manager  
City of Lake Oswego  
P.O. Box 369  
Lake Oswego, OR 97034

Sandy: Jordan Wheeler, City Manager  
City of Sandy  
39250 Pioneer Blvd.  
Sandy, OR 97055

IN WITNESS WHEREOF, the parties have executed this Agreement as of the last date of the signatures below.

CITY OF SANDY, an Oregon municipal corporation

CITY OF LAKE OSWEGO, an Oregon municipal corporation

\_\_\_\_\_  
By: Jordan Wheeler, City Manager

\_\_\_\_\_  
By: Martha Bennett, City Manager

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

APPROVED AS TO FORM:

APPROVED AS TO FORM:

\_\_\_\_\_  
Sandy City Attorney

\_\_\_\_\_  
Evan Boone  
Lake Oswego City Deputy City Attorney

EXHIBIT A

**LOCOM will:**

1. In compliance with LEDS/NCIC policies, verify and confirm all warrants, stolen and other "hits" by telephone and teletype on behalf of Sandy; including missing persons, stolen vehicles or license plates, firearms, articles, vehicle impounds.
2. Compose and send all time critical messages using the state and national computerized files.
3. Maintain the warrant file for Sandy 's municipal court.
4. Enter all missing persons, stolen vehicles or license plates, firearms and vehicle impounds.
5. Modify missing persons, stolen vehicles or license plates, firearms and vehicle impounds when appropriate to ensure the data is as comprehensive as possible.
6. Upon request, LOCOM will enter or remove articles after hours when entry or removal is a priority tied to public or officer safety and necessary for investigative purposes and a serial number or owner applied number is known.
7. Upon request, enter emergency protection orders and temporary orders.

**Sandy will:**

1. Provide sworn staff for after-hours confirmation of all non-warrant entries.
2. Enter Sandy warrants into LEDS/NCIC. A fax copy, electronic copy or the original warrant must be received at LOCOM the same business day. If a fax or electronic copy is submitted, the original warrant must be mailed to LOCOM.
3. Maintain staff to handle entries, confirmations and routine LEDS/NCIC communication functions during business hours, for all LEDS/NCIC functions except warrants.
4. Authorize LEDS to route all after-hours communication to an appropriate LEDS mnemonic for LOCOM.

**Both Parties Acknowledge:**

LOCOM is able to provide this service because it is a 24-HOUR emergency communications center. LOCOM's workload is prioritized AS LISTED BELOW to ensure the Center's primary duties are not compromised:

- a. Priority public safety dispatching services and the handling of all emergency phone calls before any other tasks.
- b. LEDS requests requiring a ten (10) minute confirmation, and in most cases, missing person entries.
- c. Non-emergency police, fire and EMS matters and business lines.

d. LEDS/NCIC entries: stolen vehicles, plates, firearms and vehicle impounds.

Exhibit B

<b>Agency</b>	<b>Year 1</b>	<b>Year 2</b>
Canby Police Department	8200.00	9000.00
Gladstone Police Department	2000.00	2200.00
Molalla Police Department	2000.00	2200.00
Oregon City Police Department	14,300.00	15,700.00
Sandy Police Department	4900.00	5300.00



## Staff Report

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**Meeting Date:** June 5, 2023  
**From** Tyler Deems, Deputy City Manager  
**SUBJECT:** Supplemental Budget - City of Sandy BN 21-23

---

### **BACKGROUND / CONTEXT:**

Local Budget Law allows for changes to be made to the budget after adopt in certain circumstances, specifically when conditions or situations arise since that were unknown at the time the budget was adopted. The current Biennium 2021-23 budget was adopted two years ago, in June 2021. Since then, certain projects have been undertaken that have necessitated some minor changes in the adopted budget. These changes are not uncommon, especially in the second year of the biennium.

Changes that are less than 10% of the total fund can be adopted at a regularly scheduled Council meeting. Changes that over 10% of the total fund require a public hearing. The changes for the General Fund are less than 10%, meaning no public hearing is required. Changes in the Street Fund, Water Fund, Wastewater Fund, Stormwater Fund, and Telecommunications are more than 10%, meaning is public hearing is required. A summary of the changes is provided below:

### **General Fund**

*General Revenue* - The General Revenue Department includes all general revenue received by the City, including property taxes, state shared revenues, and federal grants (ARPA specifically). These revenues are then transferred out to General Fund departments, like Police, Planning, and Parks & Recreation. The one item to note in this department that is different from the budget amounts is the amount received in ARPA funds. The original budget was \$2.3 million, while the actual allocation of ARPA funds ended up totaling \$2,529,223. Staff has been careful to keep these funds clearly identified in the Non-Departmental Department. As a result, this budget adjustment will transfer the additional funds received to Non-Departmental to ensure proper use in accordance with ARPA guidelines. The supplemental budget increases total resources in this department by \$229,223, and total transfers out by the same amount.

### **Street Fund**

Street Fund - Capital accounts for the all capital improvement projects associated with the City's street system. During the current biennium, significant capital improvements costs were incurred as a result of the Bell St / 362nd Ave extension. During the 2019-21 Biennium, the City obtained a Full Faith & Credit Obligation to fund the capital improvements. The majority of these proceeds were not spent during that biennium and

rolled over into the current biennium. However, the Biennium 2021-23 budget assumed that more of the funding would have spent prior to the current biennium, therefore a much larger beginning balance was realized at the beginning of this current biennium. As such, it is necessary increase resources by \$2.4 million, as well as an increase in Capital appropriations by that same amount.

#### **Water Fund**

During the current biennium capital improvements to Sandercock Reservoir, as well as other investments, begun on the City's water infrastructure. The majority of the work (over \$1 million) is being covered by a low interest loan. The remaining expenditures (\$300,000) are covered by higher than budgeted revenues. As a result of this, the appropriations in the Water Fund - Capital need to be increased by \$1.3 million to reflect the anticipated level of spending by the end of the biennium.

#### **Wastewater Fund**

With significant repairs to the existing wastewater treatment plant and related infrastructure, the WWTP (wastewater treatment plant project) Department of the Wastewater Fund is anticipated to exceed the current appropriations. In addition, grant funds were secured (\$14.7 million from ARPA, of which approximately \$10 million will be received in the current biennium), and rate revenue is projected to come in approximately \$1.5 million higher than budget. A supplemental budget is required to account of the additional \$11.5 million in expenditures, which are offset by the increase in grant and rate revenue.

#### **Stormwater Fund**

During the 2021-23 Biennium, significant repairs to the stormwater utility (approximately \$450,000) were needed. A \$400,000 interfund loan from the Wastewater Fund was needed to cover the expenditures. Additionally, rate revenue is expected to be approximately \$110,000 higher than the original budget. As a result, the supplemental budget will increase Stormwater Fund Operations expenditures by \$450,000, offset by the increase in revenue previously mentioned.

#### **Telecommunications Fund**

The Telecommunications Fund is dedicated the SandyNet fiber utility. During the current biennium, capital costs related to continuing to build out the infrastructure and bring on new customers are anticipated to exceed the current level of appropriations. Of the \$650,000 in excess expenditures, \$489,000 is offset by the ARPA allocation to connect specific location within Sandy city limits. The remaining \$161,000 is offset with an increase in rate revenue from additional customers. The supplemental budget will increase Telecommunications Fund Capital expenditures by the necessary \$650,000.

Although a public hearing is not required for all of the changes noted above, staff is recommending holding a public hearing to allow members of the public to provide comments.



**RECOMMENDATION:**

Hold a public hearing to allow for public testimony; Adopt Resolution 2023-25.

**BUDGETARY IMPACT:**

- General Fund appropriations increased by \$229,223
- Street Fund Capital increased by \$2,400,000
- Water Fund Capital increased by \$1,300,000
- Wastewater Fund Capital increased by \$11,500,000
- Stormwater Fund Operations increased by \$450,000
- Telecommunications Fund Capital increased by \$650,000

**SUGGESTED MOTION LANGUAGE:**

"I move to adopt Resolution 2023-25, a Resolution Adopting a Supplemental Budget for the City of Sandy for BN 2021-23."

**LIST OF ATTACHMENTS/EXHIBITS:**

- Resolution 2023-25



NO. 2023-25

**A RESOLUTION ADOPTING A SUPPLEMENTAL BUDGET FOR THE CITY OF SANDY FOR BN 2021-23**

**Whereas**, the City of Sandy has adopted a biennial budget for the period July 1, 2021 to June 30, 2023. Local Budget Law (ORS Chapter 294) allows for changes to the adopted budget via supplemental budget in certain cases; and

**Whereas**, ORS 294.473 allows the governing body to adopt a supplemental budget at a regularly scheduled Council meeting; and

**Whereas**, in the General Fund, an increase in federal grant funds within the General Revenue department was recognized, and a corresponding transfer to Non-Departmental is required to track and account for the receipt and use of these grant proceeds; and

**Whereas**, the Street Fund has incurred additional expenses related to the Bell St. / 362 Ave. extension project. A larger beginning balance in the fund, as well as higher intergovernmental revenue will be used to pay for the additional capital costs of the project; and

**Whereas**, the Water Fund has incurred higher than budgeted expenses related to capital improvements to the existing water system. Loan proceeds and an increase in water rates will be used to pay for the necessary improvements; and

**Whereas**, the Wastewater Fund has incurred unforeseen expenditures due to significant repairs and maintenance of the existing wastewater treatment plant. Wastewater rates were increased during the biennium to assist in paying for the required upgrades to the existing treatment plant, as well as the award of a federal grant; and

**Whereas**, the Stormwater Fund has incurred additional expenses related to urgent repairs and maintenance of the stormwater system. An interfund loan and an increase in stormwater rates will be used to pay for these investments; and

**Whereas**, the Telecommunications Fund has incurred higher than budgeted expenses related to increased customers and construction of new infrastructure. These costs will be offset but an increase contribution from the General Fund, as well as an increase in telecommunications charges for services.

#2023-25

**NOW, THEREFORE, BE IT RESOLVED** by the City Council of the City of Sandy that the following department/fund budgets be amended as follows:

<b>Fund</b>	<b>Adopted</b>	<b>Revised</b>	<b>Change</b>
<i>General Fund</i>			
Requirements:			
General Revenue - Transfers Out	13,115,000	13,344,223	229,223
Non-Departmental	3,865,458	4,094,681	229,223
<i>Street Fund</i>			
Requirements:			
Capital	9,584,027	11,984,027	2,400,000
<i>Water Fund</i>			
Requirements:			
Capital	1,546,150	2,846,150	1,300,000
<i>Wastewater Fund</i>			
Requirements:			
Capital - WWTP	18,500,000	30,000,000	11,500,000
<i>Stormwater Fund</i>			
Requirements:			
Operations	819,656	1,269,656	450,000
<i>Telecommunications Fund</i>			
Requirements:			
Capital	1,731,705	2,381,705	650,000

This resolution is adopted by the Common Council of the City of Sandy and approved by the Mayor this 05 day of June 2023

\_\_\_\_\_  
Stan Pulliam, Mayor

#2023-25

ATTEST:

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Jeff Aprati, City Recorder

#2023-25



## Staff Report

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**Meeting Date:** June 5, 2023  
**From:** Tyler Deems, Deputy City Manager  
**SUBJECT:** BN 23-25 Budget Adoption

---

### **BACKGROUND / CONTEXT:**

The City of Sandy operates on a two year budget, as allowed by Oregon's Local Budget Law. The two year period is made up of two fiscal years, running from July 1 through June 30. The City Manager is the budget officer, and is responsible for the development and management of the overall budget, as well as presenting the budget message to the Budget Committee. City Manager Jordan Wheeler presented the budget message and the proposed budget on [April 20](#), [April 27](#), [May 4](#), and [May 11, 2023](#). After deliberations from the Budget Committee, the proposed budget was approved, as amended. The amendments included the allocation of \$959,000 General Fund surplus as follows:

- \$36,000 reduction in insurance expense within the Aquatic/Recreation Center Fund
- \$30,000 increase in the IT Department for cyber resiliency
- \$15,000 increase in Recreation Department to establish aquatic programming and transportation
- \$50,000 increase in Planning Department for zoning map update
- \$115,000 increase in Parks, Buildings, & Grounds Department for mural maintenance (\$15,000) and Winterfest lights and upgrades (\$100,000)
- \$30,000 increase in Police Department for staffing study
- \$55,000 increase in Economic Development Department for Winterfest business lighting and program
- \$150,000 increase in Sandy Library Department for the purchase of an outreach vehicle
- \$50,000 increase in SandyNet Fund to assist in the SandyNet Master/Business Plan
- \$500,000 increase in Mayor and Council Department for contingency purposes to spend on future projects/programs

The Budget Committee also approved the permanent property tax rate of \$4.1152 per \$1,000 of assessed value. Once the Budget Committee has approved the budget, the City Council then must hold a public hearing before adopting the budget. Staff suggests holding a public hearing first to receive comments from the public, prior to making any motions on the following resolutions.

There are two resolutions presented within this staff report. A summary of each resolution is described below:

Each year, Oregon's Department of Administrative Services requires that the City pass a resolution to receive state-shared revenues, which includes cigarette, liquor, gas, and state taxes.

- Resolution 2023-21: Election to Receive State-Shared Revenues: To receive state-shared revenues, the City must elect to receive said revenues by adopting a resolution (attached). A public hearing is required to be held before the budget committee, as well as before the city council. The hearing was held before the budget committee on April 20, April 27, May 4, and May 11, 2021. A public hearing before the city council will be held on June 5, 2023.

In addition to the above resolution, Council also needs to adopt a resolution adopting the budget, making appropriations, and levying taxes.

- Resolution 2023-22: Adopting the Biennium 2023 - 25 Budget, Making Appropriations, and Levying Taxes: To formally adopt the BN 21-23 budget, the city must adopt a resolution adopting the budget, making appropriations, and levying taxes (attached). This resolution outlines the total budget, appropriations by organizational unit/program or object classification, depending on the fund. A public hearing before the city council will be held on June 5, 2023.

**RECOMMENDATION:**

Approve Resolution No. 2023-21 and No. 2023-22. These two resolutions should be adopted separately.

**BUDGETARY IMPACT:**

None. All resources and requirements related to these resolutions has been accounted for in the BN 23-25 budget.

**SUGGESTED MOTION LANGUAGE:**

Budget adoption requires two separate motions:

1. "I move to approve Resolution No. 2023-21, a resolution electing to receive state-shared revenues"
2. "I move to approve Resolution No. 2023-22, A Resolution Adopting the Biennium 2023-25 Budget, Making Appropriations, and Levying Taxes."

**LIST OF ATTACHMENTS/EXHIBITS:**

- BN 2023-25 Budget Committee Approved Budget
- Resolution 2023-21
- Resolution 2023-22

**CITY OF SANDY,  
OREGON  
APPROVED BUDGET  
BN 2023 - 2025**





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## **Distinguished Budget Presentation Award**

The Government Finance Officers Association of the United State and Canada (GFOA) presented an award of Distinguished Budget Presentation Award to the City of Sandy for its 2021-2023 biennial budget.

This award is the highest form of recognition in governmental budgeting. It reflects the commitment of the governing body and staff to meeting the highest principles of governmental budgeting. In order to receive the budget award, the entity had to satisfy nationally recognized guidelines for effective budget presentation. These guidelines are designed to assess how well an entity's budget serves as:

- a policy document,
- a financial plan,
- an operations guide, and
- a communications device.

Budget documents must be rated "proficient" in all four categories, and in the fourteen mandatory criteria within those categories, to receive the award.

This award is valid for a period of two years only. We believe our current budget continues to conform to program requirements, and we are submitting it to GFOA to determine its eligibility for another award. In addition to the budget award, City of Sandy receives awards for its Annual Comprehensive Financial Reports (ACFR) and Popular Annual Financial Report (PAFR), making it one of only a handful of agencies in Oregon to receive the "Triple Crown" designation.

Inquiries regarding the 2023-2025 Biennial Budget for the City of Sandy, or requests for mailing, should be directed to:

City of Sandy  
Attn: Tyler Deems, Deputy City Manager  
39250 Pioneer Boulevard  
Sandy, OR 97055  
[tdeems@ci.sandy.or.us](mailto:tdeems@ci.sandy.or.us)



GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished  
Budget Presentation  
Award*

PRESENTED TO

**City of Sandy  
Oregon**

For the Biennium Beginning

**July 01, 2021**

*Christopher P. Morill*

Executive Director

# BN 2023-2025 Approved Budget

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# BN 2023-25 Budget Message

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April 20, 2023

Mayor Pulliam, Sandy City Council, and Members of the Budget Committee:

I am pleased to deliver the City of Sandy's 2023-25 Proposed Biennial Budget. The budget is balanced and represents a total spending plan of \$127,654,710. The budget incorporates the City Council goals and reflects our continued historic investments in our wastewater and water infrastructure and projects that enhance the quality of life for our community.

A city's budget is inherently a policy document that reflects the vision, values, and goals of the community. It is the document that relates what the community wants from their city government with the financial plan for how we fund those public programs, projects, and services. The budget is also informed by the thoughtful work and community input into our city's master plans that prioritize our capital infrastructure investments and future service needs. As a rapidly growing community, the City is nearly finished with a much-needed cycle of long-term planning that will help guide us for years to come. This planning cycle will culminate with the completion of the Comprehensive Plan update, Envision Sandy 2050, in this next biennium.

As part of the Comprehensive Plan update, the Council and community developed vision statements to help guide the growth and development policies of the City for the next 25 years: In 2050, Sandy: retains its small-town feel through a celebration of community and place; is proactive in managing and planning for growth; is resilient in the face of natural hazards; is home to desirable neighborhoods and a strong workforce; boasts modern and reliable public facilities and services that support carefully planned growth, and; has a natural and scenic landscape is an extension of the community.

It is that visioning and the City Council's adopted goals that guide the development of a city budget that endeavors to keep Sandy a safe, livable, and vibrant community for years to come.

## Proposed Budget Highlights and Changes

In advance of the budget development, the City Council meets with department leadership and as a body to discuss and set goals for the upcoming biennium. For 2023-25, the Council adopted 15 goals and 29 actions within 8 categories organized by service or theme area. The following goals and their relation to the budget are highlighted but the entire list of goals can be found in this budget document.

- **Enhance public safety and community livability through enforcement of the municipal code.** The Planning Department's budget reflects the addition of a code enforcement officer that will enhance the City's approach and response to municipal code violations and compliance at a cost of \$228,000 for the biennium. The budget will maintain the current code enforcement position in the Police Department as a community services position.
- **Continue to invest in sustainable infrastructure for the City's critical public utilities, in pursuit of system resilience, expanded capacity, and environmental protection.** Sandy Clean Waters and the Water System Re-investment Project are generational investments in our essential services that will position the city well for many years to come. They require significant funding and capital

## **BN 2023-25 Budget Message**

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expenditures, customer rate and SDC revenues, and debt. These projects will take several more years to complete but already the wastewater and water funds account for over 43% of the City's total budget. Combined, \$22 million is planned in capital expenditures for the next biennium with much more spending anticipated in the next two biennia.

- **Maintain the financial strength of the City's utility funds. A) Increase the balance in the Stormwater Fund to prepare for a future Stormwater Master Plan. B) Replenish the Street Fund to support future maintenance activities. C) Continue to seek grants and alternative funding sources for the City's major capital infrastructure projects.** The water and wastewater projects require the City to continuously update our utility rate models and implement rate increases as necessary. The budget assumes increases of 36 percent (years one and two) in water, 16 percent (years one and two) in wastewater, and \$3.00 per month (year one) and \$2.00 per month (year two) for stormwater. Thus far, the City has been able to avoid Revenue Bonds for the projects through obtaining grants and low interest loans through the State Revolving Loan Fund, Water Infrastructure Finance and Innovation Act, and Business Oregon. Beyond those utilities, we are also gradually increasing rates to fund a stormwater master plan in the future to identify, prioritize, and support the City's stormwater infrastructure. This budget proposes to transfer \$600,000 from the General Fund to the Street Fund to replenish funding for pavement preservation.
- **Increase pedestrian safety, trail and local road connectivity, and traffic efficiency through high priority projects in the City's Transportation System Plan.** The Street Fund includes the completion of the 362<sup>nd</sup> and Bell Street Extension, as well as \$850,000 for the Gunderson Road/Highway 211 intersection improvements and \$150,000 towards the Dubarko Road/Highway 211 intersection improvements.
- **Manage responsible growth through engaging the public in community visioning and long range planning, and implementing code updates.** The Planning Department's budget reflects the completion of the Comprehensive Plan update (\$88,000), the Clean and Objective code audit (\$15,000), and the Housing Production Strategy (\$70,000).
- **Invest in our park system for current and future residents of Sandy and continue expansion of recreational opportunities for the community.** Our reborn Parks & Recreation Department is moving ahead on several Council goals and expanding recreational programming and popular events such as the successful Holiday Lights at Meinig. With the recently adopted Parks & Trails Master Plan and subsequent updates to the Parks SDCs and fee in lieu of parkland donation, there are several projects included in the Parks Capital Fund. The soon to be renamed Community Campus Park improvement project is funded in this budget through system development charges as well as urban renewal. Funding is also budgeted for Deer Point Park (\$1.8 million) and improvements to Meinig Park (\$200,000). The Fund also includes an appropriation (\$1.5 million) for land acquisition per the City Council's goal for seeking land for future active park facilities.
- **Complete a long-term sustainable utility plan for SandyNet that includes a rate study, staffing needs analysis, and permanent facility plan.** The Telecommunications Fund includes \$30,000 to assist SandyNet staff with the development of a new master plan for the utility.
- **Promote SAM as a safe and efficient transportation option, and increase system ridership.** The Transit Department continues its work in implementing the Transit Master Plan. With the success of obtaining several grants for capital and operations, the Transit Fund reflects the purchase of three new electric buses and the implementation of a new route to Clackamas Town Center.

## **BN 2023-25 Budget Message**

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Other highlights include:

- Facilities Maintenance. Several of the City's buildings that were built in the last 10-15 years now require some maintenance and upkeep. We have budgeted \$100,000 for painting, repairs, and maintenance on the Operations Center and \$300,000 for new roofs on the Police Department and Community/Senior Center as well as HVAC upgrades. These costs are budgeted in the Operations Center and Facilities Maintenance Internal Service Funds which are funded through transfers from a variety of departments and funds.
- City Reserves and Fund Balances. The City's General Fund contingency remains at 5% of operations not including the department contingencies. In total, the City's reserves are \$25.6 million with \$20.8 million of that residing in the Water and Wastewater Funds. Those fund balances indicate the building up of resources for the large future capital expenses and reserves needed for debt coverage that are required by our loan agreements.
- Police Department Budget and Public Safety Fee. The combination of vacancies, new hires, the new School Resource Officers program contract, and the Public Safety Fee has put the Police Department's Budget in its best position in many years. The Proposed Budget keeps the Public Safety Fee at its current rate, although we would welcome a discussion on whether to plan for a small increase to the fee to keep the revenue at pace with its purpose to fully fund the two positions that we added to the department in 2019. The Budget also includes \$280,000 in capital for 4 new police vehicles.
- FTEs. The total full-time equivalents for the City are proposed to increase 3.82 FTE to a total of 83.69. New positions include the addition of a Code Enforcement Specialist, increasing SandyNet staff by .50 FTE, and adding 3 additional staff in Public Works which reflects both the City's growth and the amount of effort required to manage the City's major capital improvement projects.

Finally, organizationally, the budget document has been updated with a few new departments and divisions. In 2021 we reorganized the Community Services Department as a Parks and Recreation Department with Recreation, Seniors, and Parks, Buildings, and Grounds as divisions. Secondly, we have separated out the Hoodland Library as a separate division to better account and track the activities of the two libraries. Third, Human Resources has been removed from the Finance division for additional transparency. And lastly, you will see the addition of key performance indicators within the department budgets as one of our efforts to help quantify the City's programs and services and drive better decision making through data.

### **Financial Trends and Assumptions**

Despite a turbulent and uncertain post-pandemic economy, the City's finances remain strong. This can be credited to the Council's strategic decisions and fiscal discipline, thoughtful planning, federal and state funding assistance, and steady growth. However, the factors of persistent higher inflation, construction cost escalation, slower development activity and the temporary moratorium, and a tight employment market influenced a more conservative approach to developing this year's budget.

- **Inflation and Cost Inflat**ors. In January 2023, the consumer price index (CPI) for cities in the region was still showing a 6% year over year increase. In comparison, two years ago the CPI was 1.6%.

## **BN 2023-25 Budget Message**

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This indicator drives increases in cost-of-living adjustments, materials, and anticipated contractual increases. On the capital budget side, the construction cost index (CCI) is an indicator that we closely monitor as it can have a large effect on our planning-level estimates and eventual bids for our major capital improvements. A third factor for our budget planning are interest rates. Increasing interest rates result in higher borrowing costs and total debt service that can influence our financing plans and must be accounted for in our rate modeling.

- **Property Values and Property Tax Revenue.** As demonstrated by the 2020 census, Sandy continues to be one of the fastest growing communities in Oregon. As a result, over the last five years, assessed values have averaged an annual increase of nearly 6%. This has translated into a healthy growth of property tax revenue, with nearly \$1 million more budgeted over the last biennium. However, despite having several projects in the pipeline with land use approval, we have conservatively budgeted a 4.5% (year 1) and 3.5% (year 2) assessed value growth. It is prudent to taper our historic growth rate given the uncertainty of the moratorium and its tempering effect on future development activity.
- **Development Activity.** With the temporary development moratorium and uncertainty around the wastewater treatment plant's capacity rating, we are anticipating reduced applications and revenue for the Planning division. This year will also mark the completion of several long-range planning efforts. As a result, we have reduced the Planning staff by 1 FTE. Even with the anticipated slowdown, the Council's policies on cost recovery and development impact fees will generate increased resources for capital from the vested private projects still in the pipeline.
- **Other Revenues.** Household growth and rate adjustments from electric, gas, and garbage providers means Franchise Fee revenues are projected to increase this biennium. Overall, General revenues are budgeted to increase 13.3% over the last biennium. As another demonstration of the magnitude of our capital improvement plans and the resources needed to fund these projects, water rate revenue will more than double from the previous biennium, and revenue from wastewater charges will increase by another 68%.
- **Personnel Services.** The City's largest operating expenses are salaries and benefits for employees. At \$22.5 million, personnel expenses are increasing by 21.5% over the last biennium. Major drivers to the increase include cost of living increases tied the consumer price index and Police labor agreement, health insurance premiums, and the 3.82 new FTEs previously noted. The Proposed Budget also includes the Paid Leave Oregon Act requirement which is an additional payroll tax that is split between the employee (.04) and employer (.06).
- **Debt Service.** As expected with the funding plans for the water and sewer projects, total city debt is increasing. Total debt is now \$40 million with an annual debt service of \$7.1 million. While Debt Service is less than the last biennium due to the final payment on a USDA Sewer Loan, debt service will begin to increase substantially in future biennia.
- **SandyNet.** The SandyNet Fund accounts for the revenue and expenses for the City's municipal fiber internet service. Since its construction in 2014, SandyNet has steadily increased its customer base – now 80% of residences – and its financial sustainability. While debt service continues to escalate until the construction bonds are paid off in 2035, revenue growth through new customers, intergovernmental agreements to expand ISP services, and gradual rate increases have allowed the utility to stay financially sustainable and affordable. The planned update of the SandyNet Master Plan will create a roadmap for the utility to maintain its affordability and customer service focused brand.

# **BN 2023-25 Budget Message**

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## **Budget Committee and City Council Input**

The City is fortunate to be in a position to have a surplus of General Fund resources due to greater than projected general revenues collected in the current biennium and the receipt of American Rescue Plan Act (ARPA) funds to compensate for the loss of revenue during the pandemic. Per the ARPA rules, cities are permitted to designate up to \$10 million of received funds as revenue loss replacement for general government services. This allows the greatest flexibility for using these funds for not only responding to the effects of the pandemic but also delivering essential services to our public.

The total amount available in the general fund over and above our reserve policy minimum is **\$959,000**, which is included in the General Fund's Non-Departmental contingency line. This amount represents the remainder of the second tranche of ARPA funds \$775,000 (after \$600,000 that is proposed in this budget to be transferred to the Street Fund), and the remaining general revenue surplus, \$184,000. Given the source of these funds, we recommend the Budget Committee views it as one-time resource for non-ongoing operational uses.

We welcome the Council and Budget Committee's input on priorities and staff offers some suggestions for discussion.

- Increase General Fund Reserves. The City's current policy for General Fund Contingency is 5% of operations with a goal to increase the policy to 10% of operations. Increasing the contingency would grow the City's general fund reserves to further improve the city's position during emergencies, changes in economic activity, cash flow, and other unforeseen expenses.
- Payoff Interfund Loan Balances. Another option would be the early payoff and elimination of the interfund loans between the Transit Fund and the Police Department and Telecommunications Fund. An additional \$151,000 to the Police Department and \$160,000 transferred to the Telecommunications Fund would pay off the loans 4 and 3 years early, respectively. Wiping this debt early would better position these departments to add future staff to keep up with our level of service as our population and customer base grows.
- Additional Street Capital and Pavement Preservation. The Proposed Budget includes a transfer of \$600,000 from the General Fund to the Street Fund. This existing transfer will help replenish the street maintenance program; however, we know that more funding for our pavement preservation program is needed to keep the City's overall street network in good condition.
- Stormwater Fund. Annual principal and interest payments for an interfund loan from the Wastewater Fund to the Stormwater Fund is included in the Proposed Budget to pay for the unplanned emergency projects on Strawbridge Parkway and Tupper Road in the current biennium. Eliminating the interfund loan balance of \$400,000 would assist in keeping the fund stable and potentially mitigate future rate increases while working towards funding for a new stormwater master plan.

(The Budget Committee, during their meetings, allocated the \$959,000 out to various departments to support programs and other purchases that meet the Council's goals. The allocations are noted in the respective departments that received additional funding)



## **BN 2023-25 Budget Message**

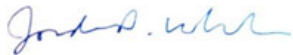
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### **Conclusion**

I want to sincerely thank our staff for their work in putting together their budgets, especially Tyler Deems who does the heavy lifting as well as the detail work to bring it all together. The City of Sandy is a unique organization with a breadth of services that are not commonly found together in most Oregon municipalities. It takes a dedicated, keen, and passionate City Council, staff team, and community volunteers to effectively plan, guide, and manage such a range of services and programs.

I also want to acknowledge the Council's focus and actions that keep the City in strong financial position, especially in the face of seemingly insurmountable infrastructure challenges. Thank you for all your work and commitment to the current and future generations of community members that call Sandy home.

Respectfully submitted,



Jordan Wheeler

# Sandy, Oregon

## City Overview

The City of Sandy is the most eastern city in Clackamas County, beautifully situated as the gateway to Mt. Hood. Sandy has a thriving economic base, including many businesses serving visitors to the Mt. Hood Recreation Area. In the foothills of the Cascades, Sandy's elevation varies from 750 to over 1,000 feet. Mount Hood shelters the city from the storms experienced in the Columbia River gorge.

The climate is mild, but as with the rest of Oregon west of the Cascades, rain occurs frequently in the winter. This rain falls as snow on Mount Hood, and Sandy residents enjoy the convenient access to nearby opportunities for skiing, snowboarding, and snowshoeing. In other seasons, the beautiful and scenic pacific northwest outdoors provide nearby opportunities for hiking, camping, backpacking, and mountain biking adventures.

As one of the fastest growing cities in Oregon, Sandy offers the warmth of a small town with the services of a big city. The city operates its own fiber internet service and transit system, and provides police, parks and recreation, library, public works and utilities, and general government functions such as planning and building.

### Demographics & City Stats

Population	12,991
Incorporation	1911
Form of Government	Council/Manager
Households	4,317
Median Age	37.6
City Parks	14
Park Acreage	280
Miles of City Streets	43
Miles from Timberline Lodge	34
Miles from Portland International Airport	25

### Economic Indicators

Largest Employers	
Oregon Trail School District	440
Fred Meyer	211
Mt. Hood Corporations, Inc.	100
City of Sandy	86
Johnson RV	76
Unemployment Rate	3.3%
Median Household Income	\$88,775
Average market value of Residential homes	\$394,730
Average assessed value of residential homes	\$226,975

## City Council

The City of Sandy is governed by a seven-member City Council comprised of the Mayor and six City Council members. The Mayor serves a two-year term, and the Council members serve four-year terms. All members are elected at-large. Like most cities in Oregon, Sandy is a council-manager form of government. The City Council members are responsible for city policies, legislation, and adopting the city budget. The Council appoints a city manager who is then responsible for the day-to-day operation of the city consistent with the policy direction set by the Council.

#### 2023 City Council

Mayor Stan Pulliam  
Council President Laurie Smallwood  
Councilor Chris Mayton  
Councilor Rich Sheldon  
Councilor Kathleen Walker  
Councilor Carl Exner  
Councilor Don Hokanson

#### Appointed Budget Committee Members

Jan Lee  
Jeremy Pietzold  
Linda Malone  
Greg Becker  
Noah Myhrum  
Timothy Huber  
(vacant)

# Council Goals

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## Council Goals

Each year the City Council sets goals for the community and city government. These goals help direct the budget and work program for city staff. The Council adopted the following goals for the 2023-25 biennium:

### 1. Public Safety and Community Livability

- Enhance public safety and community livability through enforcement of the municipal code.
  - Develop a budget proposal for adding a code enforcement position.
  - Develop a traffic safety and speed enforcement program that includes a filled traffic officer position and deployment of speed enforcement technology such as radar speed signs and speed trailers.
  - See grant funding to support traffic safety and speed enforcement, and other programs within the Police Department.
- Continue addressing homelessness through partnerships with local and regional partners.
  - Explore partnerships and shared costs for staffing related to behavioral health needs.

### 2. Public Works

- Continue to invest in sustainable infrastructure for the City's critical public utilities, in pursuit of system resilience, expanded capacity, and environmental protection.
- Maintain the financial strength of the City's utility funds.
  - Increase the balance in the Stormwater Fund to prepare for a future Stormwater Master Plan.
  - Replenish the Street Fund to support future maintenance activities.
  - Continue to seek grants and alternative funding sources for the city's major capital infrastructure projects.
- Increase pedestrian safety, trail and local road connectivity, and traffic efficiency through high priority projects in the City's Transportation System Plan.
  - Adopt the updated Transportation System Plan.
  - Complete speed limit studies for Bluff Road and Highway 211.
  - Study intersection and pedestrian safety improvements to the Dubarko Road/Highway 211 intersection.

### 3. Community Planning and Economic Development

- Foster community and economic development and tourism opportunities through events and projects that promote and leverage the City's storied history and natural beauty.
  - Expand on the Holidays Lights at Meinig Park to create a Winterfest event throughout the holiday season.
- Adopt and implement the Economic Development Strategic Plan; recruit businesses to Sandy in alignment with the goals and strategies identified in the plan.
- Manage responsible growth through engaging the public in community visioning and long-range planning and implementing code updates.
  - Complete Envision Sandy 2050 and adopt the Comprehensive Plan update.
  - Implement policy changes and new and emerging state regulations through code amendments that are responsible and reflect the community values.
  - Pursue code options to retain local control of decision making over shelters and transitional housing.

## Council Goals

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- Continue to update the planning and building development fees to increase cost recovery.

### 4. Parks & Recreation

- Invest in our park system for current and future residents of Sandy and continue expansion of recreational opportunities for the community.
  - Design and construct the Community Campus Park improvements.
  - Complete design and construct park improvements at Deer Point Park.
  - Research and act on the purchase of park land for future park facilities and/or natural area and open space preservation.
  - Work with the Oregon Trail School District for developing a new facility use agreement.
  - Explore ways to connect Sandy residents with aquatic opportunities, including swim lessons and water safety programs.
  - Reestablish a volunteer program and expand volunteer opportunities.

### 5. SandyNet

- Complete a long-term sustainable utility plan for SandyNet that includes a rate study, staffing needs analysis, and permanent facility plan.

### 6. Library

- Advocate for the financial sustainability for the Sandy and Hoodland Libraries and expand access to materials and enrichment programs.
  - Seek funding for a community outreach and engagement vehicle.
  - Work with the County on the long-term plans for the Hoodland Library.

### 7. Transit

- Promote SAM as a safe, and efficient transportation option and increase system ridership.
  - Increase community awareness and utilization of convenient routes within city limits, particularly the Shopper Shuttle.
  - Ensure the proposed Clackamas County Town Center route is appropriately planned, safe, and efficient.
  - Continue modernization of the fleet and operations.

### 8. Good Governance & City Operations

- Enhance Council effectiveness through updating the City Council Rules.
- Maintain financial sustainability of city programs, events, and services through adequate cost recovery policies and practices.
- Develop a Sustainable Staffing Plan for the City of Sandy.
  - Continue investing in the city's workforce to retain talented and community-oriented employees through competitive compensation and recognition.
  - Forecast current and future staffing needs to maintain service levels, mitigate operational risks, and adequately manage key projects and priorities.
  - Develop an achievable plan for accommodating current and future space needs for city staff and operations.

## **Budget Process**

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### **Oregon Budget Law & Budgeting in the City of Sandy**

The City of Sandy prepares and adopts a budget in accordance with its City Charter and ORS 249.305 through 294.565, the State's local budget law. These statutes provide the legal standards for preparing, presenting, adopting, implementing, monitoring, and amending the budget. Amending the budget by less than 10% is accomplished via resolution, while changes greater than 10% require advance notice and a public hearing prior to the adoption of the budget amendment. Additionally, the city uses the modified accrual basis of accounting in both the budget and the annual financial report.

As the local budget officer, the city manager is responsible for the management of the overall city budget and maintaining budgetary controls at the approved appropriation level. Ongoing review and monitoring of revenues and expenditures is performed by Finance and the respective operating department directors.

### **Budget Committee**

As mandated by Oregon Budget law (ORS 294.336), Sandy has a budget committee consisting of the governing body (City Council) and an equal number of registered voters (citizen members) appointed by the City Council. Appointed members serve four-year terms. The budget committee reviews the City Manager's proposed budget, receives public input, sets the tax rate, and approves a budget.

### **City of Sandy Budget Approach and Philosophy**

The City of Sandy's budget management approach is "expenditure control budgeting," which allows general fund departments the same budget authority and responsibility as the directors of enterprise funds. The chief features of this approach are that the general fund departments are allocated general revenues (property taxes, franchise fees, state shared revenues, etc.) and the departments can carry over budget savings from one biennium to the next. Allocating revenue and allowing departments to keep what they do not spend helps eliminate the "spend it or lose it" incentive and similar budget games apparent in other budget management approaches. Like the enterprise funds, general fund departments have more flexibility and ownership in the preparation of their budgets and in planning for one-time expenses (equipment and capital). Of course, any carryover balances also must be used in ways that are consistent with Council's priorities and should not be used for ongoing commitments such as staff costs.

Unlike most local government budgets, Sandy's budget explicitly shows the amount of general revenues that are allocated to departments within the General Fund. These revenue allocations are ultimately set by the City Council through the budget process. Direct Service Departments in the General Fund develop their budgets, estimate department revenues, and provide supporting documentation to justify general revenue allocations.

The general fund departments also show internal fees for service which reflect the costs for administrative and overhead expenses such as payroll, finance, legal, technology, and other internal support functions. Usually, such costs are hidden from sight in a city's general fund budget, but to increase transparency and reflect the true cost of providing services, these internal charges are shown in the General Fund's direct service departments. The administrative service departments then receive the charges as revenue in their budgets.

# Budget Process

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## Funds/Fund Structure

The City's budget is organized on the basis of self-balancing funds. These funds are classified as follows:

### *Governmental Funds*

- General Fund
  - 18 departments
- Street Fund
- Transit Fund
- Aquatic/Recreation Center Fund
- City FF&C Debt Service Fund
- Parks Capital Projects Fund

### *Proprietary Funds*

- Water Fund
- Sewer Fund
- Stormwater Fund
- SandyNet Fund
- Operations Internal Service Fund
- Facilities Maintenance Internal Service Fund

## Budget Calendar

### **January 2023**

- Council goal setting workshop
- Interview and appoint budget committee members

### **February 2023**

- Department directors prepare their individual budgets

### **March 2023**

- City Manager prepares proposed budget

### **April 2023**

- Publish notice of budget committee meetings
- First budget committee meeting (April 20<sup>th</sup>)
  - Receive the budget message
  - Review the proposed budget
  - Receive public comment
- Second budget committee meeting (April 27<sup>th</sup>)

### **May 2023**

- Third budget committee meeting (May 4<sup>th</sup>)
- Fourth budget committee meeting (May 11<sup>th</sup>)
  - Budget committee approves budget
- Publish budget summary and notice of budget hearing

### **June 2023**

- Hold budget hearing (June 5<sup>th</sup>)
  - Council meeting to enact resolutions to adopt budget, make appropriations, and impose taxes
- Submit tax certification documents to County Assessor

### **July 2023**

- Submit copy of complete budget document to County

# Financial Trends

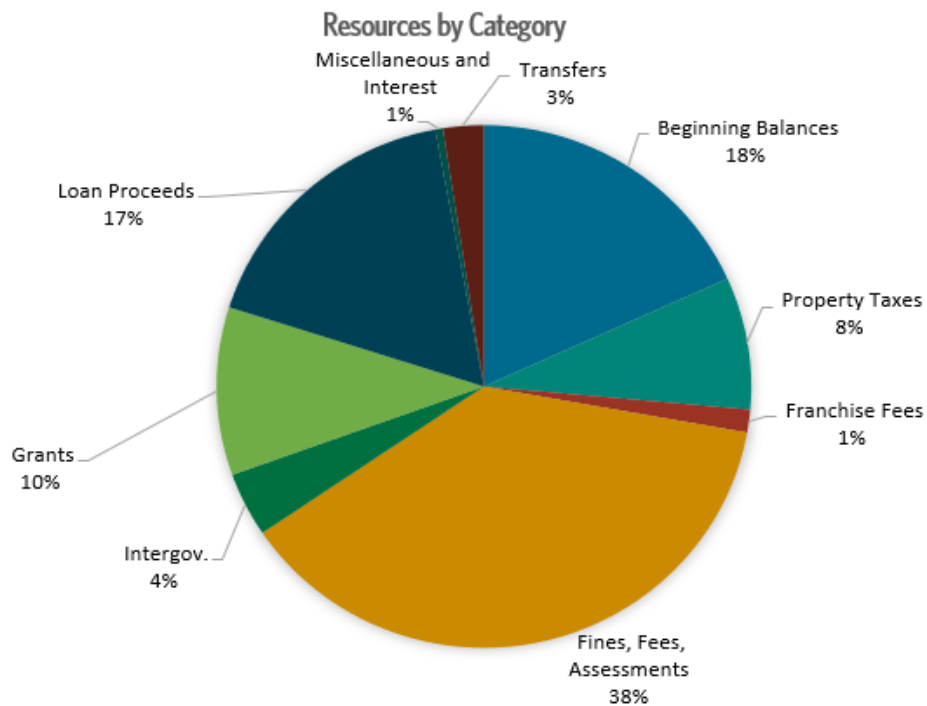
## Resources

The city's largest source of revenue are fines, fees, and assessments which includes utility fees and system development charges for sewer, water, stormwater, SandyNet, transit and gas taxes. The utility rates and SandyNet fees are set and approved by City Council resolution based on costs to provide services and invest in infrastructure. Revenue projections for fines, fees, and assessments are based on trend analysis, which property tax projections are calculated based on taxable value, which is provided by Clackamas County.

Beginning balances include reserves for future capital expenditures and paying down bonds, department carryovers, and fund contingencies.

Intergovernmental revenues include state shared revenues (liquor and cigarette taxes), state gas taxes, and the county library district funds.

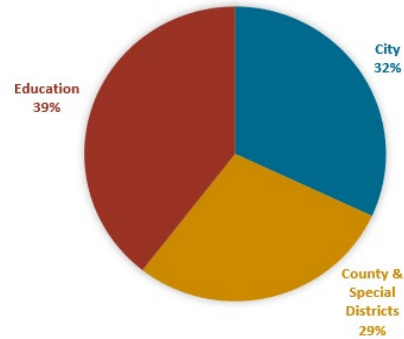
Grants include county, state, and federal grants for transit, police, and community services. Loan proceeds reflect a variety of new debt, largely in the Water and Wastewater Funds to complete work on both utilities' infrastructure projects. Additional information on specific projects can be found within the narrative for each fund.



# Financial Trends

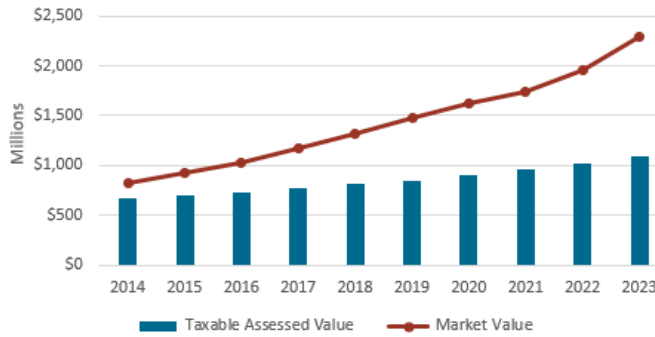
## Property Taxes

Property taxes are the largest source of revenue for the General Fund. The City's permanent tax rate is \$4.1152 per \$1,000 of assessed value. Taxes are calculated based on a property's assessed value. Assessed values can only increase for two reasons: an annual 3% increase if the assessed value is lower than its market value, or if improvements are made to the property that increases its value. Sandy's total taxable assessed value of \$1.086 billion is about 47% of the total market value.



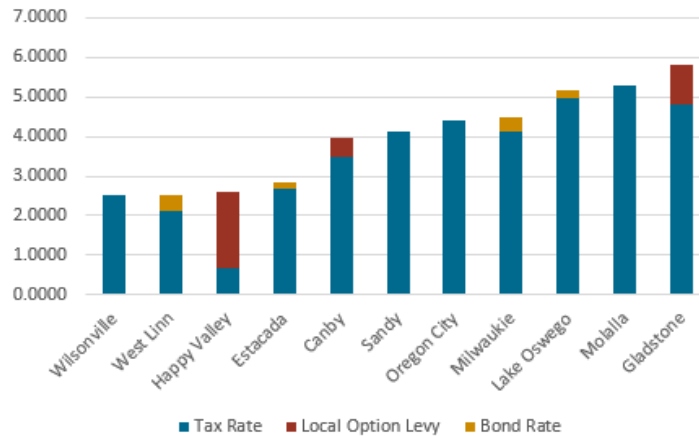
The City receives about 32% of a property's total tax bill. For a home with the average assessed value of \$227,000, the city receives about \$1,254.

Taxable Assessed vs. Market Value



In comparison to other cities within Clackamas County, Sandy's permanent tax rate is around average. The city does not currently have a local option levy for operations, or any outstanding voter approved general obligation bonded debt.

Cities in Clackamas County Tax Rate Comparison

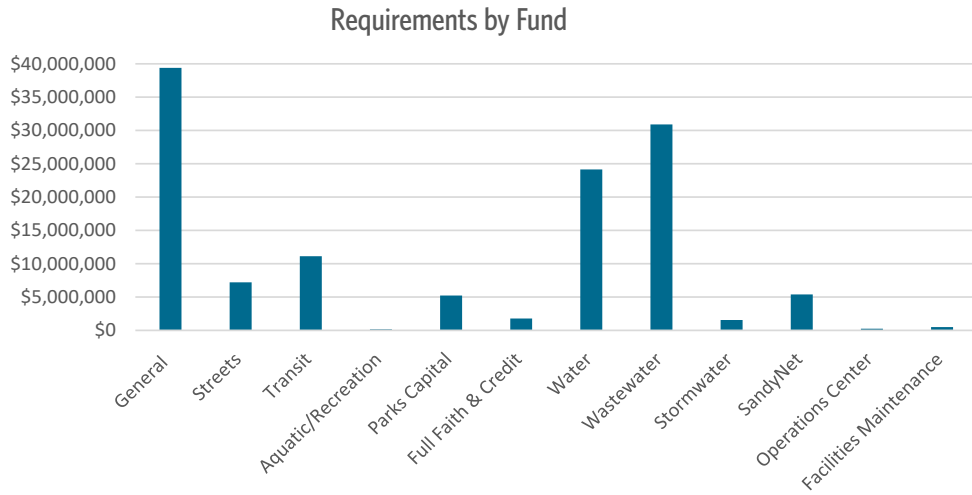




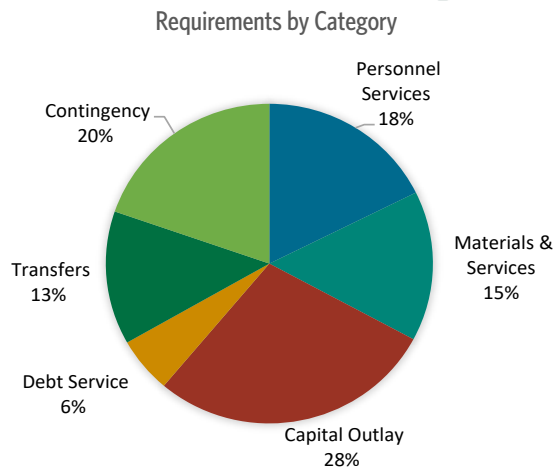
# Financial Trends

## Requirements

The total requirements citywide for the 2023-25 Biennium is \$126,654,710. The city's largest fund is the General Fund which includes general government services such as Police, Community Services, Planning, Library, and administrative services.



The largest expenses for the city are personnel services and capital outlay. Personnel services include salaries and benefits for city employees. Materials and Services include contracted and professional services, supplies and equipment, repairs, and utility expenses. Transfers reflect charges for service between departments and funds.



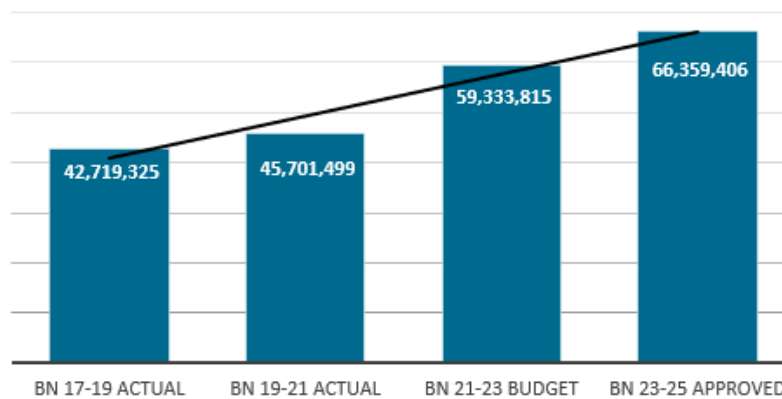
## Financial Trends

### Operating Budget

The operating budget reflects the ongoing costs to fund city services. These costs include personnel services, materials and services, transfers, and debt service. It is important to note that the transfers include the allocation of general revenue and internal charges for services.

Category	BN 23-25 Approved
Personnel Services	22,558,200
Materials & Services	19,376,599
Debt Service	7,183,855
Transfers	17,240,752
<b>Total Operating</b>	<b>66,359,406</b>

### Total Operating Budget

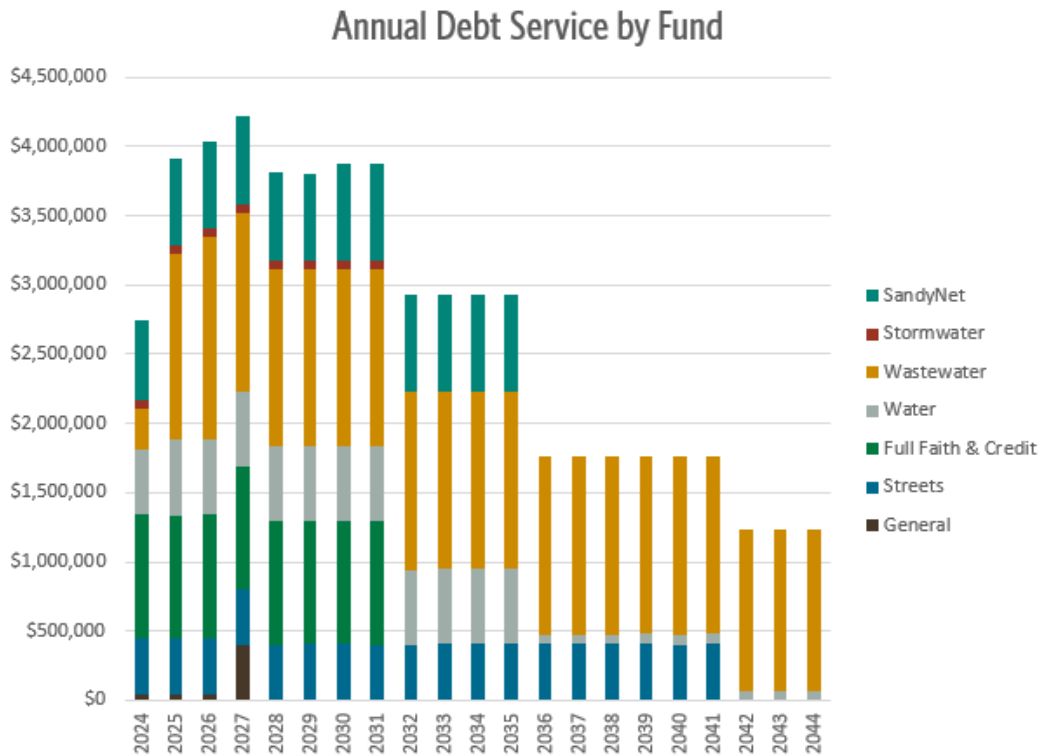


Operating Budget by Fund	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Approved
General	25,347,105	26,438,991	31,972,527	35,960,635
Streets	1,720,940	2,445,013	2,976,880	3,739,333
Transit	3,602,922	3,809,962	4,347,649	6,619,150
Aquatic/Recreation	582,431	164,381	254,251	139,599
Parks Capital	35,360	147,130	149,433	-
Sewer Bond Reserve	-	-	1,875,957	-
Full Faith & Credit	1,657,640	1,775,634	1,775,634	1,775,634
Water	3,212,509	3,271,286	3,721,464	4,995,335
Wastewater	2,843,031	3,523,895	7,337,598	7,129,564
Stormwater	439,329	621,333	725,745	1,261,132
SandyNet	3,168,919	3,289,787	3,821,677	4,588,024
Operations Center	109,140	121,104	125,000	151,000
Facilities Maintenance	-	92,984	250,000	-
<b>Total Operating Budget</b>	<b>42,719,325</b>	<b>45,701,499</b>	<b>59,333,815</b>	<b>66,359,406</b>

# Debt Summary

## Citywide Debt Service

The city's total annual debt service (principal and interest payments) is over \$6.66 million for the 2023-2025 biennium. Debt limitations for general obligation bonds are calculated at a rate of 3% of the real market value of property within city limits. The city currently has no general obligation bonds. The current bond rating is AA-, as confirmed by S&P Global in April 2021. The chart below reflects *existing* and *known* debt service by fund as of July 1, 2023.

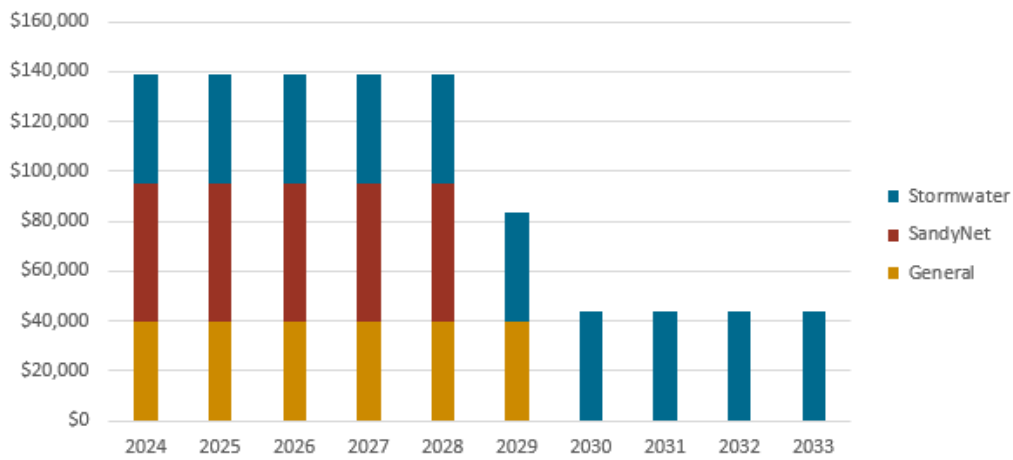


# Debt Summary

## Interfund Loans

The Transit Fund has provided loans to the General Fund (for the Police Department) and SandyNet Fund (for SandyNet capital construction). The Wastewater Fund has provided a loan to the Stormwater Fund (for capital construction costs).

### Interfund Loans by Fund



# Budget Summaries

## Citywide Summary by Fund

	Beginning Balance	Revenues	Total Resources	Operating Expenditures	Capital Outlay	Contingency/ Reserve	Total Requirements
General	4,809,806	34,580,496	39,390,302	35,960,635	1,105,900	2,323,767	39,390,302
Streets	2,327,412	4,879,000	7,206,412	3,739,333	2,672,000	795,079	7,206,412
Transit	2,058,598	9,061,015	11,119,613	6,619,150	3,953,486	546,977	11,119,613
Aquatic/Recreation	157,000	1,000	158,000	139,599	-	18,401	158,000
Parks Capital	2,979,638	2,250,000	5,229,638	-	5,000,000	229,638	5,229,638
Full Faith & Credit	-	1,775,634	1,775,634	1,775,634	-	-	1,775,634
Water	2,445,615	21,710,000	24,155,615	4,995,335	11,630,000	7,530,280	24,155,615
Wastewater	4,951,070	25,961,575	30,912,645	7,129,564	10,436,064	13,347,017	30,912,645
Stormwater	32,942	1,520,500	1,553,442	1,261,132	176,000	116,310	1,553,442
SandyNet	139,843	5,257,000	5,396,843	4,588,024	757,000	51,819	5,396,843
Operations Center	1,000	250,000	251,000	151,000	100,000	-	251,000
Facilities Maintenance	395,566	110,000	505,566	-	300,000	205,566	505,566
<b>Total</b>	<b>20,298,490</b>	<b>107,356,220</b>	<b>127,654,710</b>	<b>66,359,406</b>	<b>36,130,450</b>	<b>25,164,854</b>	<b>127,654,710</b>

## Citywide Summary by Category

Resources	BN 23-25 Approved
Beginning Balances	20,298,490
Property Taxes	9,100,000
Franchise Fees	1,575,000
Fines, Fees, Assessments	41,982,015
Inter-governmental	4,425,594
Interest	250,500
Grants	11,573,250
Transfers	2,735,634
Loans Proceeds	19,115,888
Miscellaneous	264,024
Indirect Service Revenue	2,906,315
General Revenue	13,428,000
<b>Total</b>	<b>127,654,710</b>

Requirements	BN 23-25 Approved
Personnel Services	22,558,200
Materials & Services	19,376,599
Capital Outlay	36,130,450
Debt Service	7,183,855
Transfers	17,240,752
Contingency	25,164,854
<b>Total</b>	<b>127,654,710</b>

## Budget Summaries

### General Fund Summary

The General Fund is the city's general operating fund of the City and is used to account for financial activity not accounted for in other more specialized funds. The General Fund includes the general government services and the revenue and expenses for Police, Library, Community Services, Planning & Building, Municipal Court, Parks, and administrative services.

Since general revenues are accounted for twice in the budget (as general revenues into the General Fund – property taxes, franchise fees, etc., and then as resources into the direct service departments), the total budget number is inflated.

General Fund	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	2,393,994	2,418,486	2,521,710	4,809,806	4,809,806
Property Taxes	6,703,250	7,455,155	8,110,000	9,100,000	9,100,000
Franchise Fees	1,272,344	1,248,543	1,290,000	1,575,000	1,575,000
Fines, Fees, & Assessments	2,136,499	2,589,344	2,508,200	2,739,044	2,739,044
Intergovernmental	4,048,659	3,698,263	3,804,504	4,425,594	4,425,594
Interest	132,500	103,588	85,000	75,000	75,000
Grants	415,035	296,630	2,598,000	345,443	345,443
Transfers	175,234	-	-	-	-
Loan Proceeds	758,752	-	325,000	-	-
Miscellaneous Revenue	177,097	390,450	50,500	36,100	36,100
Indirect Service Revenue	1,868,674	2,047,294	2,359,000	2,840,315	2,906,315
General Revenue	8,685,930	9,481,000	12,814,000	12,463,000	13,378,000
<b>Total Resources</b>	<b>28,767,968</b>	<b>29,728,754</b>	<b>36,465,914</b>	<b>38,409,302</b>	<b>39,390,302</b>
Personnel Services	10,766,645	11,668,711	13,645,500	15,497,600	15,497,600
Materials & Services	3,041,079	3,060,551	3,226,947	4,211,450	4,406,450
Capital Outlay	679,126	224,869	442,000	855,900	1,105,900
Debt Service	478,701	286,676	421,422	260,386	260,386
Transfers	11,060,679	11,423,053	14,678,658	14,801,199	15,796,199
Contingency	-	-	3,792,882	2,782,767	2,323,767
<b>Total Requirements</b>	<b>26,026,231</b>	<b>26,663,861</b>	<b>36,207,409</b>	<b>38,409,302</b>	<b>39,390,302</b>

## Budget Summaries

### General Fund Summary by Department

General Fund	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
General Revenue	9,535,374	10,328,364	13,115,000	12,463,000	12,463,000
Mayor & Council	67,916	86,097	119,799	131,377	631,377
Administration	487,978	524,331	714,101	867,200	867,200
Legal	215,689	195,696	250,000	262,000	262,000
Municipal Court	246,674	208,843	172,764	162,000	162,000
Finance	707,259	743,699	853,350	596,000	596,000
Sandy Library	3,222,092	3,337,382	3,407,738	3,223,841	3,373,841
Police	6,622,097	6,742,433	7,721,500	8,442,908	8,472,908
Human Resources	-	-	-	426,550	426,550
Recreation	955,358	897,868	977,619	1,095,909	1,110,909
Seniors	1,265,670	1,380,997	1,321,892	1,503,076	1,503,076
Parks, Buildings, & Grounds	821,055	886,284	998,439	1,551,085	1,666,085
Planning	853,713	911,966	1,168,134	1,371,043	1,421,043
Building	1,348,517	1,312,194	959,677	1,115,203	1,115,203
Economic Development	387,500	279,614	286,321	244,204	299,204
Non-Departmental	1,514,163	1,322,153	3,865,458	3,487,223	3,523,223
Information Technology	517,055	589,436	534,122	752,050	782,050
Hoodland Library	-	-	-	714,633	714,633
<b>Total Resources</b>	<b>28,768,109</b>	<b>29,747,358</b>	<b>36,465,914</b>	<b>38,409,302</b>	<b>39,390,302</b>
General Revenue	8,995,496	9,791,000	13,115,000	12,463,000	12,463,000
Mayor & Council	55,986	78,286	119,799	131,377	631,377
Administration	475,041	498,260	714,101	867,200	867,200
Legal	219,993	241,608	250,000	262,000	262,000
Municipal Court	155,298	137,141	172,764	162,000	162,000
Finance	604,848	627,240	853,350	596,000	596,000
Sandy Library	3,134,512	3,136,562	3,407,738	3,223,841	3,373,841
Police	6,666,523	6,480,822	7,721,500	8,442,908	8,472,908
Human Resources	-	-	-	426,550	426,550
Recreation	697,362	647,613	977,619	1,095,909	1,110,909
Seniors	1,008,599	1,140,477	1,321,892	1,503,076	1,503,076
Parks, Buildings, & Grounds	748,380	856,787	998,439	1,551,085	1,666,085
Planning	548,602	756,455	1,168,134	1,371,043	1,421,043
Building	780,614	910,343	959,677	1,115,203	1,115,203
Economic Development	357,905	220,657	286,321	244,204	299,204
Non-Departmental	1,384,159	798,627	3,865,458	3,487,223	3,523,223
Information Technology	412,903	584,399	534,122	752,050	782,050
Hoodland Library	-	-	-	714,633	714,633
<b>Total Requirements</b>	<b>26,246,223</b>	<b>26,906,278</b>	<b>36,465,914</b>	<b>38,409,302</b>	<b>39,390,302</b>

## Fund Balances

### Beginning Balances and Contingencies by Fund/Department

Fund/Department	Beginning Balance	Contingency	% Change	Reason for Changes Larger Than 10% of Fund Balance
General Revenue	630,000	-		
Mayor & Council	7,377	503,048		
Administration	73,319	13,500		
Legal	12,000	12,000		
Municipal Court	17,000	2,927		
Finance	14,150	10,200		
Sandy Library	331,989	87,443		
Police	454,208	72,697		
Human Resources	-	6,500		
Recreation	187,909	48,785		
Senior Services	354,847	84,812		
Parks, Buildings, & Grounds	44,985	20,707		
Planning	95,043	30,812		
Building	405,203	246,142		
Economic Development	44,204	10,652		
Non-Departmental	2,032,223	1,150,223		
Information Technology	50,016	12,500		
Hoodland Library	55,333	10,819		
<b>General Fund Total</b>	<b>4,809,806</b>	<b>2,323,767</b>	<b>-51.69%</b>	Due to spending ARPA funds.
Streets	2,327,412	795,079	-65.84%	Due to spending related to capital construction costs.
Transit	2,058,598	546,977	-73.43%	Due to capital expenditures for new equipment.
Aquatic/Recreation	157,000	18,401	-88.28%	Due to spending down fund balance intentionally as aquatics have been discontinued.
Parks Capital	2,979,638	229,638	-92.29%	Due to spending related to capital construction costs for new park development.
Full Faith & Credit	-	-	0.00%	
Water	2,445,615	7,530,280	207.91%	Due to building up reserves for future capital projects and related debt service.
Wastewater	4,951,070	13,347,017	169.58%	Due to building up reserves for future capital projects and related debt service.
Stormwater	32,942	116,310	253.08%	Due to building up reserves for future capital projects and related debt service.
SandyNet	139,843	51,819	-62.94%	Due to spending related to capital reinvestment in the network.
Operations Center	1,000	-	-100.00%	Due to ongoing operating expenditures.
Facilities Maintenance	395,566	205,566	-48.03%	Due to capital expenditures for city owned buildings
<b>Subtotal Other Funds</b>	<b>15,488,684</b>	<b>22,841,087</b>		
<b>City Total</b>	<b>20,298,490</b>	<b>25,164,854</b>		

### BN 2023-25 Budget Notes

- General Revenue category reflects more revenue estimated to be received into the general fund than budgeted in the BN 21-23.
- The Non-Department contingency is the General Fund's reserves which is budgeted at 5% of the fund's operations.
- Changes of more than 10% of fund balance are noted in the chart above.



# General Revenue

## Overview

The General Fund receives several ongoing, unrestricted resources that are allocated to the general fund direct service departments. These sources of revenue include:

- Property Taxes
- Franchise Fees
- Business and Liquor License Fees
- State Shared Revenue (Liquor Tax, Cigarette Tax)
- Other miscellaneous revenue

The allocation of general revenues is shown explicitly as transfers to specific direct service departments (City Council, Municipal Court, Library, Police, Recreation, Seniors, Parks, Buildings, & Grounds, Planning, Economic Development, and Non-Departmental).

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	550,124	539,879	374,500	630,000	630,000
Property Taxes	6,703,250	7,455,155	8,110,000	9,100,000	9,100,000
Franchise Fees	1,272,344	1,248,543	1,290,000	1,575,000	1,575,000
Fines, Fees, & Assessments	233,302	237,870	222,500	256,000	256,000
Intergovernmental	590,780	738,678	738,000	842,000	842,000
Interest	110,984	81,614	70,000	50,000	50,000
Grants	-	-	2,300,000	-	-
Miscellaneous	74,590	26,625	10,000	10,000	10,000
<b>Total Resources</b>	<b>9,535,374</b>	<b>10,328,364</b>	<b>13,115,000</b>	<b>12,463,000</b>	<b>12,463,000</b>

### General Revenue Distribution:

Council	47,181	73,000	107,000	124,000	124,000
Administration	-	-	129,000	158,000	158,000
Court	176,315	100,000	93,000	135,000	135,000
Sandy Library	311,292	339,000	339,000	206,000	206,000
Police	4,580,030	5,660,000	6,215,000	6,670,000	6,670,000
Recreation	546,938	563,000	605,000	705,000	705,000
Seniors	683,047	740,000	760,000	735,000	735,000
Parks, Buildings, & Grounds	688,387	743,000	870,000	1,400,000	1,400,000
Planning	258,145	280,000	547,000	920,000	920,000
Economic Development	343,680	242,000	224,000	200,000	200,000
Non-Departmental	950,915	741,000	2,925,000	1,210,000	1,210,000
SandyNet	162,817	150,000	60,000	-	-
Aquatic/Recreation Center Fund	241,179	160,000	241,000	-	-
Parks Capital Fund	5,570	-	-	-	-
<b>Total Requirements</b>	<b>8,995,496</b>	<b>9,791,000</b>	<b>13,115,000</b>	<b>12,463,000</b>	<b>12,463,000</b>

### BN 23-25 Budget Notes

- Property tax revenue reflects a citywide assessed value growth of 4.5% in FY23-24 and 3.5% in FY24-25.
- General Revenue distribution to Non-Departmental accounts for a portion of the City's overall operating contingency.

# General Revenue

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-000-401000	Beginning Balance	550,124	539,879	374,500	630,000	630,000
110-000-410100	Current Year Property Tax	6,523,419	7,339,332	8,010,000	9,000,000	9,000,000
110-000-410200	Prior Years Property Tax	179,831	115,823	100,000	100,000	100,000
110-000-411100	Transient Room Tax	70,577	82,737	70,000	100,000	100,000
110-000-431001	Franchise Fee Electricity	751,911	778,887	775,000	970,000	970,000
110-000-431002	Franchise Fee Telephone	47,744	36,349	40,000	30,000	30,000
110-000-431003	Franchise Fee Garbage	108,592	103,951	125,000	165,000	165,000
110-000-431004	Franchise Fee Television	94,445	56,057	60,000	40,000	40,000
110-000-431005	Franchise Fee Gas	269,651	273,300	290,000	370,000	370,000
110-000-431120	Telephone ROW Privilege Tax	4,502	5,167	5,000	6,000	6,000
110-000-432100	Business Licenses	108,201	106,804	110,000	120,000	120,000
110-000-432400	Liquor Licenses	4,609	3,790	4,000	4,000	4,000
110-000-434300	School Excise Administration Fee	3,790	3,256	3,000	2,000	2,000
110-000-440300	Federal Grants	-	-	2,300,000	-	-
110-000-441110	State Shared - Liquor	352,086	435,921	440,000	515,000	515,000
110-000-441120	State Shared - Revenue Share	212,870	279,914	280,000	310,000	310,000
110-000-441130	State Shared - Cigarette Tax	25,825	22,843	18,000	17,000	17,000
110-000-454400	Erosion Control Plan Review Fee	11,998	215	-	-	-
110-000-454500	City Administration Fee	2,985	629	-	-	-
110-000-455100	Lien Search Fee	22,950	27,870	25,000	20,000	20,000
110-000-471100	Interest	110,984	81,614	70,000	50,000	50,000
110-000-478000	Miscellaneous	72,090	26,625	10,000	10,000	10,000
110-000-478150	PEG Fees	3,302	7,189	5,000	4,000	4,000
110-000-478300	Garage Sale Sign Revenue	387	213	500	-	-
110-000-479000	Surplus Property	2,500	-	-	-	-
<b>Total Resources</b>		<b>9,535,374</b>	<b>10,328,364</b>	<b>13,115,000</b>	<b>12,463,000</b>	<b>12,463,000</b>
110-000-911024	Revenue Distribution - Council	47,181	73,000	107,000	124,000	124,000
110-000-911025	Revenue Distribution - Administration	-	-	129,000	158,000	158,000
110-000-911027	Revenue Distribution - Court	176,315	100,000	93,000	135,000	135,000
110-000-911029	Revenue Distribution - Sandy Library	311,292	339,000	339,000	206,000	206,000
110-000-911030	Revenue Distribution - Police	4,580,030	5,660,000	6,215,000	6,670,000	6,670,000
110-000-911033	Revenue Distribution - Recreation	546,938	563,000	605,000	705,000	705,000
110-000-911034	Revenue Distribution - Seniors	683,047	740,000	760,000	735,000	735,000
110-000-911035	Revenue Distribution - Parks, Buildings, & Grounds	688,387	743,000	870,000	1,400,000	1,400,000
110-000-911036	Revenue Distribution - Planning	258,145	280,000	547,000	920,000	920,000
110-000-911038	Revenue Distribution - Economic Development	343,680	242,000	224,000	200,000	200,000
110-000-911039	Revenue Distribution - Non-Departmental	950,915	741,000	2,925,000	1,210,000	1,210,000
110-000-911056	Revenue Distribution - SandyNet	162,817	150,000	60,000	-	-
110-000-911280	Revenue Distribution - Aquatic/Recreation Center Fund	241,179	160,000	241,000	-	-
110-000-911350	Revenue Distribution - Parks Capital Fund	5,570	-	-	-	-
<b>Total Requirements</b>		<b>8,995,496</b>	<b>9,791,000</b>	<b>13,115,000</b>	<b>12,463,000</b>	<b>12,463,000</b>

# Mayor & Council

## Department Overview

The Mayor & Council Department accounts for expenditures related to City Council business. All Council members are volunteers, elected by the citizens of Sandy; the Mayor serves a term of two years, while all Councilors serve four-year terms. The Council sets policies and direction for the city, which is then implemented and carried out by city staff.

## 2021-23 Accomplishments and Highlights

- Implemented hybrid in-person / virtual public meeting capabilities.

## Goals

- See Council Goals listed earlier in this document.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Council Agenda Items	119	101	116	106	138	129
Work Session Items	8	10	15	18	20	13
Council Meeting Time (hours)	46	41	78	68	99	64

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	(10,265)	11,930	12,799	7,377	7,377
Miscellaneous	-	1,167	-	-	-
General Revenue	47,181	73,000	107,000	124,000	624,000
Indirect Service Revenue	31,000	-	-	-	-
<b>Total Resources</b>	<b>67,916</b>	<b>86,097</b>	<b>119,799</b>	<b>131,377</b>	<b>631,377</b>
Materials & Services	28,479	48,304	59,300	73,700	73,700
Capital Outlay	3,070	223	-	-	-
Transfers	24,436	29,759	54,360	54,629	54,629
Contingency	-	-	6,139	3,048	503,048
<b>Total Requirements</b>	<b>55,986</b>	<b>78,286</b>	<b>119,799</b>	<b>131,377</b>	<b>631,377</b>

## BN 23-25 Budget Notes

- Materials & Services include funding for Councilors to attend the League of Oregon cities conference, service fees for hybrid meetings, organizational fees, and meeting expenses.
- Contingency adjusted to 2% of the department's operating budget, plus a one-time \$500,000 contribution from General Fund surplus to use towards future Council endeavors, including capital programs or other items that meet the Council's goals.

## Mayor & Council

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-024-401100	Beginning Balance	(10,265)	11,930	12,799	7,377	7,377
110-024-478200	Reimbursement	-	1,167	-	-	-
110-024-490139	Transfer from Non-Dept.	-	-	-	-	500,000
110-024-491110	General Revenue	47,181	73,000	107,000	124,000	124,000
110-024-492110	Indirect Service Revenue	31,000	-	-	-	-
<b>Total Resources</b>		<b>67,916</b>	<b>86,097</b>	<b>119,799</b>	<b>131,377</b>	<b>631,377</b>
110-024-601100	Supplies	1,818	4,322	2,500	4,000	4,000
110-024-601200	Postage	183	2	100	-	-
110-024-601300	Printing	162	-	100	200	200
110-024-601400	Copier Charges	425	42	100	-	-
110-024-601401	Branding & Marketing	2,197	130	2,000	1,000	1,000
110-024-601500	Public Notices	-	120	-	500	500
110-024-601600	Organizational Fees	2,500	5,000	7,000	6,000	6,000
110-024-601700	Memberships	280	4,262	7,000	10,000	10,000
110-024-602200	Conferences	2,709	8,426	15,000	18,000	18,000
110-024-602300	Training & Professional Advancement	-	-	1,000	1,000	1,000
110-024-602500	Meetings & Meals	(132)	366	2,000	4,500	4,500
110-024-603100	Mileage Reimbursement	948	899	-	500	500
110-024-604100	Repairs & Maintenance	21	1,680	-	-	-
110-024-605100	Contractual Services	-	6,834	-	10,000	10,000
110-024-607100	Utilities	10,322	10,375	12,000	12,000	12,000
110-024-624100	Clackamas Cities Dinners	995	1,686	4,000	3,500	3,500
110-024-624200	Council Work Sessions	3,517	1,986	2,000	-	-
110-024-624300	Mayor and Council Expense	1,029	1,571	2,000	-	-
110-024-624600	Volunteer Recognition	1,506	603	2,500	2,500	2,500
110-024-740000	Furniture & Office Equipment	3,070	223	-	-	-
110-024-910670	Transfer to Op Center IS Fund	730	885	888	-	-
110-024-911110	Indirect Support Cost	23,706	28,874	53,472	54,629	54,629
110-024-951000	Contingency	-	-	6,139	3,048	503,048
<b>Total Requirements</b>		<b>55,986</b>	<b>78,286</b>	<b>119,799</b>	<b>131,377</b>	<b>631,377</b>

# Administration

## Department Overview

The Administration Department includes the City Manager, Director of Policy and Community Relations, and portions of various support staff. In the Council-Manager form of government, the City Manager is appointed by the City Council to implement council policies and manage the day-to-day operations of the city. This work includes overseeing all city departments and employees, managing the city budget as approved by the Council, working with elected officials and members of the community, and keeping the Council informed of city business.

## 2021-23 Accomplishments and Highlights

- Grew communications audience substantially; 33% increase in newsletter readership, website visits up 40%, relaunched dormant Instagram account.
- Launched new initiative to leverage video and other media tools to increase public engagement.
- Implemented enhanced staff report development / agenda preparation process.
- Coordinated intergovernmental relations efforts to secure funding for infrastructure projects.

## Goals

- Implement City Council Goals.
- Identify and implement ways to continue to facilitate more public engagement in decision making processes.
- Deploy new public meeting management platform.
- Work with departments to continue to increase communications quantity and quality.

## Staffing

	17-19	19-21	21-23	23-25
<b>Total FTE</b>	<b>1.53</b>	<b>1.56</b>	<b>2.01</b>	<b>2.05</b>

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	62,517	12,937	18,101	73,319	73,319
Miscellaneous Revenue	66	31,394	-	-	-
General Revenue	-	-	129,000	158,000	158,000
Indirect Service Revenue	425,395	480,000	567,000	635,881	635,881
<b>Total Resources</b>	<b>487,978</b>	<b>524,331</b>	<b>714,101</b>	<b>867,200</b>	<b>867,200</b>
Personnel Services	437,647	483,350	644,500	827,200	827,200
Materials & Services	31,829	8,729	32,000	26,500	26,500
Capital Outlay	5,565	6,182	-	-	-
Contingency	-	-	37,601	13,500	13,500
<b>Total Requirements</b>	<b>475,041</b>	<b>498,260</b>	<b>714,101</b>	<b>867,200</b>	<b>867,200</b>

## BN 23-25 Budget Notes

- General Revenue accounts for 50% of the Director of Policy and Community Relations position.
- Contingency set at approximately 2% of the department's operating budget.

## Administration

Account Number	Account Name	BN 17-19	BN 19-21	BN 21-23	BN 23-25	BN 23-25
		Actual	Actual	Budget	Proposed	Approved
110-025-401100	Beginning Balance	62,517	12,937	18,101	73,319	73,319
110-025-478000	Miscellaneous Revenue	66	6,394	-	-	-
110-025-478200	Reimbursement	-	25,000	-	-	-
110-025-491110	General Revenue	-	-	129,000	158,000	158,000
110-025-492110	Indirect Service Revenue	425,395	480,000	567,000	635,881	635,881
<b>Total Resources</b>		<b>487,978</b>	<b>524,331</b>	<b>714,101</b>	<b>867,200</b>	<b>867,200</b>
110-025-511100	Salaries	316,372	349,687	451,000	578,000	578,000
110-025-511200	Overtime	4,425	4,327	3,000	-	-
110-025-521100	Insurance Benefits	21,264	15,570	27,000	31,000	31,000
110-025-521200	FICA Taxes	24,112	27,689	35,000	45,000	45,000
110-025-521300	PERS	61,356	81,764	119,000	160,000	160,000
110-025-521360	Other Benefits	7,248	1,257	-	-	-
110-025-521500	Workers' Benefit Fund	178	161	500	300	300
110-025-521600	Unemployment Insurance	322	362	500	2,500	2,500
110-025-521700	Paid Leave Oregon Tax	-	-	-	2,500	2,500
110-025-521800	Workers' Comp Insurance	434	361	5,500	4,400	4,400
110-025-521900	Transit Tax	1,935	2,172	3,000	3,500	3,500
110-025-601100	Supplies	3,103	791	6,000	5,000	5,000
110-025-601200	Postage	252	90	500	500	500
110-025-601300	Printing	354	-	-	500	500
110-025-601400	Copier Charges	120	87	500	-	-
110-025-601401	Branding & Marketing	180	399	-	2,000	2,000
110-025-601700	Memberships	11,009	2,986	5,000	3,000	3,000
110-025-601800	Books and Subscriptions	-	181	-	500	500
110-025-602100	Employee Recruitment	851	10	500	-	-
110-025-602200	Conferences	5,701	1,427	15,000	12,000	12,000
110-025-602300	Training & Professional Advancement	4,719	150	2,000	1,000	1,000
110-025-602500	Meetings & Meals	989	1,308	2,000	1,000	1,000
110-025-603100	Mileage Reimbursement	36	5	500	500	500
110-025-605100	Contractual Services	2,915	1,295	-	-	-
110-025-607100	Utilities	1,529	-	-	500	500
110-025-639100	Program - Youth Council	73	-	-	-	-
110-025-740000	Furniture & Office Equipment	3,125	-	-	-	-
110-025-740100	Computer Equipment	2,440	6,182	-	-	-
110-025-951000	Contingency	-	-	37,601	13,500	13,500
<b>Total Requirements</b>		<b>475,041</b>	<b>498,260</b>	<b>714,101</b>	<b>867,200</b>	<b>867,200</b>

# Legal

## Department Overview

The Legal Department accounts for the legal representation and services for the City Council, Sandy Urban Renewal Agency, City Manager and all City departments/funds. The revenue source is a transfer from departments and funds that utilize legal services.

The City has a professional services agreement with Beery Elsner & Hammond, LLP to provide general and specialized municipal legal services. The base contract calls for attendance at Council and Planning Commission meetings. Additional time is billed on an hourly basis.

Legal services include developing City ordinances and resolutions, enforcement of City codes, defense against lawsuits, and legal advice to the City Council and staff.

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	62,088	(4,304)	-	12,000	12,000
Indirect Service Revenue	153,601	200,000	250,000	250,000	250,000
<b>Total Resources</b>	<b>215,689</b>	<b>195,696</b>	<b>250,000</b>	<b>262,000</b>	<b>262,000</b>
Materials & Services	219,993	241,608	250,000	250,000	250,000
Contingency	-	-	-	12,000	12,000
<b>Total Requirements</b>	<b>219,993</b>	<b>241,608</b>	<b>250,000</b>	<b>262,000</b>	<b>262,000</b>

## BN 23-25 Budget Notes

- The budget reflects a flat projected expenditure for legal fees, as well as a modest contingency for unanticipated expenses that may arise from any of the many large-scale projects and potential land use cases in this biennium.

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-026-401100	Beginning Balance	62,088	(4,304)	-	12,000	12,000
110-026-492110	Indirect Service Revenue	153,601	200,000	250,000	250,000	250,000
<b>Total Resources</b>		<b>215,689</b>	<b>195,696</b>	<b>250,000</b>	<b>262,000</b>	<b>262,000</b>
110-026-608102	City Attorneys	219,993	241,608	250,000	250,000	250,000
110-026-951000	Contingency	-	-	-	12,000	12,000
<b>Total Requirements</b>		<b>219,993</b>	<b>241,608</b>	<b>250,000</b>	<b>262,000</b>	<b>262,000</b>

# Municipal Court

## Department Overview

The Municipal Court Department is the judicial branch of Sandy's government. The Municipal Court Judge is appointed by the Council. The court is committed to resolving cases in a manner that is fair and impartial, and to treating all defendants, officers, and witnesses with respect as we provide services that are efficient, timely, and accurate. The Judge determines the judicial philosophy for the court and creates rules to ensure consistent service is provided to all defendants involved in Sandy's judicial system.

## 2021-23 Accomplishments and Highlights

- Continued to improve processes and become more efficient while also reducing the amount of paper documents.
- Returned to in-person court proceedings after having limited exposure to the public during the COVID-19 pandemic.

## Goals

- Implement show-cause hearings to allow the Court to act on old cases where the defendant has not complied with the judgement of the Court.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Citations Processed	533	827	1,358	1,324	830	889

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	0.80	0.63	0.65	0.56

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	62,288	91,376	69,764	17,000	17,000
Fines, Fees, & Assessments	8,035	13,530	10,000	10,000	10,000
Miscellaneous Revenue	36	3,937	-	-	-
General Revenue	176,315	100,000	93,000	135,000	135,000
<b>Total Resources</b>	<b>246,674</b>	<b>208,843</b>	<b>172,764</b>	<b>162,000</b>	<b>162,000</b>
Personnel Services	95,912	82,507	96,300	103,500	103,500
Materials & Services	36,052	26,940	32,550	32,450	32,450
Capital Outlay	2,324	2,745	-	-	-
Transfers	21,010	24,949	22,540	23,123	23,123
Contingency	-	-	21,374	2,927	2,927
<b>Total Requirements</b>	<b>155,298</b>	<b>137,141</b>	<b>172,764</b>	<b>162,000</b>	<b>162,000</b>

## BN 23-25 Budget Notes

- Fines, Fees, & Assessments includes revenue from payment plans and license suspensions.
- 37% of Materials & Services reflects the expenses associated with the Municipal Court Judge.



# Municipal Court

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-027-401100	Beginning Balance	62,288	91,376	69,764	17,000	17,000
110-027-477000	Court Fees	8,035	13,530	10,000	10,000	10,000
110-027-478000	Miscellaneous Revenue	36	3,937	-	-	-
110-027-491110	General Revenue	176,315	100,000	93,000	135,000	135,000
<b>Total Resources</b>		<b>246,674</b>	<b>208,843</b>	<b>172,764</b>	<b>162,000</b>	<b>162,000</b>
110-027-511100	Salaries	60,379	55,883	70,000	74,000	74,000
110-027-511200	Overtime	796	1,130	-	-	-
110-027-521100	Insurance Benefits	15,206	2,400	1,000	1,000	1,000
110-027-521200	FICA Taxes	4,688	4,360	5,500	6,000	6,000
110-027-521300	PERS	12,088	13,633	19,000	21,000	21,000
110-027-521360	Other Benefits	2,162	4,479	-	-	-
110-027-521500	Workers' Benefit Fund	60	42	100	100	100
110-027-521600	Unemployment Insurance	62	57	100	400	400
110-027-521700	Paid Leave Oregon Tax	-	-	-	400	400
110-027-521800	Workers' Comp Insurance	103	181	100	100	100
110-027-521900	Transit Tax	368	342	500	500	500
110-027-601100	Supplies	20,475	14,953	15,000	16,000	16,000
110-027-601200	Postage	681	1,550	1,000	1,000	1,000
110-027-601300	Printing	-	-	-	-	-
110-027-601400	Copier Charges	71	37	100	-	-
110-027-601401	Branding & Marketing	199	-	250	250	250
110-027-601700	Memberships	300	-	250	250	250
110-027-601800	Books and Subscriptions	7	-	250	250	250
110-027-602100	Employee Recruitment	-	-	-	-	-
110-027-602200	Conferences	160	-	500	500	500
110-027-602300	Training & Professional Advancement	1,938	-	1,000	1,000	1,000
110-027-602500	Meetings & Meals	83	-	100	100	100
110-027-603100	Mileage Reimbursement	108	-	100	100	100
110-027-605100	Contractual Services	180	1,450	-	-	-
110-027-608100	Professional Services	2,150	100	2,000	1,000	1,000
110-027-608300	Municipal Court Judge	9,700	8,850	12,000	12,000	12,000
110-027-740000	Furniture & Office Equipment	210	1,887	-	-	-
110-027-740100	Computer Equipment	2,114	858	-	-	-
110-027-911110	Indirect Support Cost	21,010	24,949	22,540	23,123	23,123
110-027-951000	Contingency	-	-	21,374	2,927	2,927
<b>Total Requirements</b>		<b>155,298</b>	<b>137,141</b>	<b>172,764</b>	<b>162,000</b>	<b>162,000</b>

# Finance

## Department Overview

The Finance Department serves the public and internal customers in a variety of ways, including receipting and disbursing financial resources, accurate and timely recording of all financial activity, accounting for fixed assets, monitoring financial compliance with various requirements, and providing support in financial management. General responsibilities of the department include utility billing, accounts receivable and payable, payroll, budgeting, auditing, financial reporting, and risk management.

## 2021-23 Accomplishments & Highlights

- Submitted and received the Distinguished Budget Presentation, Popular Annual Financial Report, and the Annual Comprehensive Financial Report awards through the Government Finance Officers Association (GFOA).

## Goals

- Continue to find creative ways to increase transparency and understanding of the City's finances.
- Continue to work with departments to increase the overall financial stability of the City.
- Review insurance claims in greater detail and determine reasonable actions to reduce the number of claims filed each year.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Utility Accounts	3,779	3,850	3,900	3,998	4,021	4,076
Insurance Claims	4	7	9	21	12	9

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	2.40	2.55	2.67	1.30

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	108,824	102,411	79,350	14,150	14,150
Miscellaneous Revenue	1,841	7,994	2,000	1,000	1,000
Indirect Service Revenue	596,593	633,294	772,000	580,850	580,850
<b>Total Resources</b>	<b>707,259</b>	<b>743,699</b>	<b>853,350</b>	<b>596,000</b>	<b>596,000</b>
Personnel Services	473,084	497,000	651,500	425,800	425,800
Materials & Services	122,097	120,465	141,850	160,000	160,000
Capital Outlay	9,666	9,775	-	-	-
Contingency	-	-	60,000	10,200	10,200
<b>Total Requirements</b>	<b>604,848</b>	<b>627,240</b>	<b>853,350</b>	<b>596,000</b>	<b>596,000</b>

*Human Resources moved to own department in BN 23-25*

## Finance

### BN 23-25 Budget Notes

- Staffing and related personnel costs decreased because of moving the Human Resources Director and 20% of the Accounting Specialist position out of Finance and into a dedicated department for Human Resources. In addition, a larger position of the Deputy City Manager's time is allocated to Administration for work not directly related to finance.
- 78% of Materials & Services is directly related to cost of conducting the annual audit.
- Reduced contingency to approximately 2% of the department's operating budget.

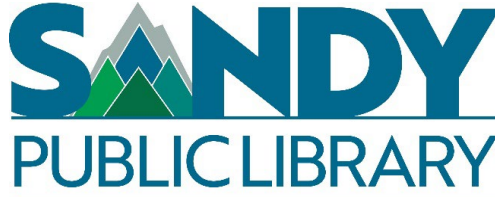
Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-028-401100	Beginning Balance	108,824	102,411	79,350	14,150	14,150
110-028-478000	Miscellaneous Revenue	1,841	7,994	2,000	1,000	1,000
110-028-492110	Indirect Service Revenue	596,593	633,294	772,000	580,850	580,850
<b>Total Resources</b>		<b>707,259</b>	<b>743,699</b>	<b>853,350</b>	<b>596,000</b>	<b>596,000</b>
110-028-511100	Salaries	337,524	355,396	480,000	286,000	286,000
110-028-511200	Overtime	2,645	3,487	-	-	-
110-028-521100	Insurance Benefits	5,760	1,999	4,000	34,000	34,000
110-028-521200	FICA Taxes	26,191	27,562	37,000	22,000	22,000
110-028-521300	PERS	69,223	70,641	126,000	79,000	79,000
110-028-521360	Other Benefits	28,874	34,869	-	-	-
110-028-521500	Workers' Benefit Fund	231	236	500	200	200
110-028-521600	Unemployment Insurance	342	360	500	1,200	1,200
110-028-521700	Paid Leave Oregon Tax	-	-	-	1,200	1,200
110-028-521800	Workers' Comp Insurance	240	289	500	400	400
110-028-521900	Transit Tax	2,054	2,162	3,000	1,800	1,800
110-028-601100	Supplies	13,927	18,037	20,000	15,000	15,000
110-028-601200	Postage	1,855	1,937	1,500	1,500	1,500
110-028-601300	Printing	30	-	500	-	-
110-028-601400	Copier Charges	849	646	250	-	-
110-028-601401	Branding & Marketing	1,236	1,201	1,000	1,000	1,000
110-028-601500	Public Notices	693	681	1,000	1,000	1,000
110-028-601600	Organizational Fees	2,185	3,200	2,000	2,500	2,500
110-028-601700	Memberships	895	809	2,000	5,000	5,000
110-028-601800	Books and Subscriptions	1,552	1,552	-	-	-
110-028-602100	Employee Recruitment	20	10	-	-	-
110-028-602200	Conferences	2,807	771	2,500	3,000	3,000
110-028-602300	Training & Professional Advancemen	2,472	1,962	10,000	5,000	5,000
110-028-602500	Meetings & Meals	376	183	500	500	500
110-028-603100	Mileage Reimbursement	428	589	500	500	500
110-028-605100	Contractual Services	90,588	87,796	100,000	125,000	125,000
110-028-607100	Utilities	2,175	1,080	-	-	-
110-028-628100	Bank Charges	10	10	100	-	-
110-028-740000	Furniture & Office Equipment	5,372	4,693	-	-	-
110-028-740100	Computer Equipment	4,294	5,082	-	-	-
110-028-951000	Contingency	-	-	60,000	10,200	10,200
<b>Total Requirements</b>		<b>604,848</b>	<b>627,240</b>	<b>853,350</b>	<b>596,000</b>	<b>596,000</b>

## Sandy Library

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### Department Overview

The Sandy Library was founded in 1934 by the Sandy Woman's Club. Since 1977, when the first county-wide funding levy was approved by voters, Sandy has been one of the 12 public libraries in Clackamas County that have cooperated in an informal resource and revenue sharing network, named LINCC, which stands for "Libraries in Clackamas County". Over the past 36 years, LINCC libraries have shared in the proceeds of a variety of county-wide funding mechanisms, which have culminated in the passage in November 2008 of a county-wide Library Service District with a permanent tax rate of \$0.3974 per thousand of assessed value. The Sandy Service Area extends from Boring to Wildcat Creek Road (Near Windells Ski Camp) and currently houses over 28,000 (city and unincorporated) residents. The Sandy Library resides in a city-owned facility of 11,620 square feet and will be open this coming year 56 hours per week.



The library supports the community in its endeavor to create lifelong readers. Support is provided to help residents learn to read and write, develop the ability to find accurate information, and connect to the online world. The department delivers on its mission by offering traditional library services including reference assistance and materials for entertainment and study, as well as high speed internet access, downloadable e-books and e-audiobooks, databases, the ability to receive and send information online (such as tax forms, job applications, and photos), and staff to assist customers in using technology. Community members enjoy library space to sit quietly and read or study. The library offers a seed library, library of things collection, and space for programs such as English language and reading tutoring, book clubs, story times, classes, musical performers, and community meetings. In addition to in-person programs, the library offers asynchronous story times, 'take & make' crafts for all ages, and virtual book groups.

### 2021-23 Accomplishments & Highlights

- Rebounded programing to 53% of pre-pandemic level, with participation rebounding to 57%.
- In 2022, over 209,000 items were physically checked out with nearly 12,000 attendees at various programs.
- Analyzed collections for diversity, equity, and inclusion.
- Started reading tutoring again in July 2022. From July 2022 - March 2023 we have held 121 one-hour sessions with one student and one tutor.
- Started ESOL classes and tutoring again in September 2022 and October 2022. From September 2022 - March 2023, 56 people have attended English language classes. From October 2022 - March 2023, we have held 46 one-hour sessions with one student and one tutor.
- November 2022 - January 2023 we held a Civics Challenge. 28 people joined in the fun.

### Goals

- Continue to regrow programs and attendance in a post-COVID-19 environment.
- Encourage LINCC Directors to push forward the taskforce.
- Secure a funding source for an outreach/technology pop-up vehicle.
- Enhance library marketing with teen videos.
- Make progress towards the goal of every child in the Oregon Trail School District obtaining a library card.

# Sandy Library

## Performance Measures

	2017	2018	2019	2020	2021	2022
Circulation Count	365,124	355,065	348,818	274,270	169,821	271,103
Items Added	6,998	7,777	6,775	5,564	5,451	6,171
Cardholders/Registered Borrowers	16,517	15,657	14,565	13,814	12,104	11,390
Information Questions	9,315	6,780	6,671	4,465	4,545	3,172
Programs Offered	718	716	593	431	90	315
Participants in Programs	12,364	16,861	18,438	8,479	2,832	10,501
Computer Sessions	19,731	19,463	16,003	10,710	1,101	5,820
Wireless Sessions	9,600	20,000	25,267	27,329	9,044	23,176
Visits	178,004	174,484	164,993	122,400	5,258	72,620

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	13.82	13.34	13.33	11.05

## Budget Summary & Detail

	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	227,221	87,579	131,534	331,989	331,989
Intergovernmental	2,578,032	2,779,768	2,875,504	2,648,894	2,648,894
Fines, Fees, & Assessments	70,580	67,030	37,700	20,044	20,044
Grants	5,295	10,765	10,000	10,914	10,914
Miscellaneous Revenue	29,671	53,239	14,000	6,000	6,000
General Revenue	311,292	339,000	339,000	206,000	356,000
<b>Total Resources</b>	<b>3,222,092</b>	<b>3,337,382</b>	<b>3,407,738</b>	<b>3,223,841</b>	<b>3,373,841</b>
Personnel Services	2,238,459	2,230,671	2,535,500	2,440,500	2,440,500
Materials & Services	468,809	450,113	411,500	308,250	308,250
Capital Outlay	31,685	22,532	11,000	24,900	174,900
Debt Service	91,874	91,874	95,000	90,292	90,292
Transfers	303,686	341,372	301,984	272,456	272,456
Contingency	-	-	52,754	87,443	87,443
<b>Total Requirements</b>	<b>3,134,512</b>	<b>3,136,562</b>	<b>3,407,738</b>	<b>3,223,841</b>	<b>3,373,841</b>

*Hoodland Public Library moved to own department in BN 23-25*

## BN 23-25 Budget Notes

- Revenue and expenses for the Hoodland Library is now accounted for in its own Department.
- Intergovernmental accounts for revenue from the Clackamas County Library District for the Sandy service area.
- Capital Outlay includes a one-time \$150,000 contribution from General Fund surplus to acquire an outreach vehicle for library programs and community involvement.
- Debt Service reflects the principal and interest payments on the library construction loan.
- Sandy Library Program costs are separately funded by revenue from the Friends of Sandy Library Endowment Fund, which are held in a dedicated Trust Fund not identified within this budget document.

## Sandy Library

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-029-401100	Beginning Balance	227,221	87,579	131,534	331,989	331,989
110-029-441210	State Grants	5,295	10,765	10,000	10,914	10,914
110-029-442400	District Funding	2,578,032	2,779,768	2,875,504	2,648,894	2,648,894
110-029-442500	Other Agencies	-	-	-	-	-
110-029-463100	Fines	46,762	17,232	18,000	14,000	14,000
110-029-475000	Donations/Other	12,156	45,636	13,000	1,400	1,400
110-029-477100	Miscellaneous Revenue	29,671	53,239	14,000	6,000	6,000
110-029-477110	Lost/Paid Fees	6,722	2,671	6,700	4,644	4,644
110-029-478200	Reimbursement	4,940	1,491	-	-	-
110-029-490139	Transfer from Non-Dept.	-	-	-	-	150,000
110-029-491110	General Revenue - Operations	311,292	339,000	339,000	115,708	115,708
110-029-491111	General Revenue - Debt	-	-	-	90,292	90,292
<b>Total Resources</b>		<b>3,222,092</b>	<b>3,337,382</b>	<b>3,407,738</b>	<b>3,223,841</b>	<b>3,373,841</b>

Requirements are listed on the following page.

## Sandy Library

110-029-511100	Salaries	1,551,874	1,494,345	1,682,000	1,567,000	1,567,000
110-029-511200	Overtime	3,761	39	-	-	-
110-029-521100	Insurance Benefits	172,538	198,506	248,000	298,000	298,000
110-029-521200	FICA Taxes	119,302	114,331	129,000	120,000	120,000
110-029-521300	PERS	323,958	384,824	461,000	430,000	430,000
110-029-521360	Other Benefits	50,308	23,717	-	-	-
110-029-521500	Workers' Benefit Fund	1,478	1,093	1,500	1,000	1,000
110-029-521600	Unemployment Insurance	1,560	1,495	2,000	6,200	6,200
110-029-521700	Paid Leave Oregon Tax	-	-	-	6,300	6,300
110-029-521800	Workers' Comp Insurance	4,324	3,354	2,000	2,000	2,000
110-029-521900	Transit Tax	9,357	8,967	10,000	10,000	10,000
110-029-601100	Supplies	20,625	31,638	18,000	17,850	17,850
110-029-601200	Postage	257	133	1,000	400	400
110-029-601300	Printing	1,906	545	600	500	500
110-029-601400	Copier Charges	5,213	4,852	5,000	-	-
110-029-601401	Branding & Marketing	475	-	1,000	-	-
110-029-601402	Copier Charges - Hood	-	1,074	-	1,000	1,000
110-029-601600	Organizational Fees	65	75	100	-	-
110-029-601700	Memberships	775	103	100	600	600
110-029-601800	Books and Subs. (NOT LIBR)	761	991	700	500	500
110-029-602100	Employee Recruitment	-	-	-	-	-
110-029-602200	Conferences	1,731	479	1,000	-	-
110-029-602300	Training & Professional Advancement	2,807	1,669	2,000	3,000	3,000
110-029-602500	Meetings & Meals	482	364	200	-	-
110-029-603100	Mileage Reimbursement	441	-	-	-	-
110-029-604100	Repairs & Maintenance	26,324	15,950	10,000	11,000	11,000
110-029-605100	Contractual Services	54,843	49,060	50,000	36,500	36,500
110-029-605101	Contractual Services - Hood	-	-	-	-	-
110-029-606120	Building Rent - Hood	42,636	43,546	44,000	-	-
110-029-607100	Utilities	43,506	39,611	39,000	31,000	31,000
110-029-607101	Utilities - Hood	-	-	-	-	-
110-029-608100	Professional Services	1,968	4,889	2,000	7,500	7,500
110-029-609100	Insurance	13,815	17,867	13,000	15,000	15,000
110-029-629101	Library Books	72,979	81,256	67,200	81,000	81,000
110-029-629102	Library Magazines	6,593	5,995	6,500	7,500	7,500
110-029-629103	Videos/DVD's	21,050	19,254	15,400	19,000	19,000
110-029-629104	Acquisition Database	21,589	24,377	22,000	17,000	17,000
110-029-629105	Video Games	3,075	1,704	1,900	2,000	2,000
110-029-629106	CD Music	3,351	1,124	1,200	400	400
110-029-629107	Audio Books	10,159	6,942	8,600	7,400	7,400
110-029-629108	Program Story Time	230	18	-	-	-
110-029-629109	Reference Databases	17,787	12,396	6,800	5,500	5,500
110-029-629110	Digital	21,234	25,279	27,500	30,000	30,000
110-029-629120	Supplies-Hood	-	-	-	-	-
110-029-629121	Library Books-Hood	15,050	12,847	14,400	-	-
110-029-629122	Library Magazines-Hood	2,288	2,251	2,500	-	-
110-029-629123	Videos/DVD's-Hood	9,082	10,141	7,700	-	-
110-029-629126	CD Music-Hood	2,874	1,899	800	-	-
110-029-629127	Audio Books-Hood	4,244	2,580	3,300	-	-
110-029-629129	Reference Databases-Hood	3,414	2,659	1,400	-	-
110-029-629130	Digital-Hood	4,221	5,233	5,600	-	-
110-029-629200	Program - Child. State Library	7,422	5,828	10,000	9,600	9,600
110-029-629300	Program - Summer Reading	5,481	2,574	1,000	4,000	4,000
110-029-629350	Program - General	18,059	12,911	20,000	-	-
110-029-740000	Furniture & Office Equipment	2,128	140	-	1,700	1,700
110-029-740100	Computer Equipment	16,012	17,576	5,000	23,200	23,200
110-029-740200	Library Equipment	13,545	4,816	6,000	-	150,000
110-029-812100	Loan Principal	53,355	56,582	60,000	64,594	64,594
110-029-832903	Loan Interest	38,518	35,292	35,000	25,698	25,698
110-029-911110	Indirect Support Cost	303,686	341,372	301,984	272,456	272,456
110-029-951000	Contingency	-	-	52,754	87,443	87,443
<b>Total Requirements</b>		<b>3,134,512</b>	<b>3,136,562</b>	<b>3,407,738</b>	<b>3,223,841</b>	<b>3,373,841</b>

# Police

## Department Overview

The Sandy Police Department's mission is to fulfill the law enforcement needs of the people with the highest degree of fairness, professionalism, and integrity, and to protect the inherent rights of the people to live in freedom and safety. The department is committed to protecting the lives of our community members, ensuring a safe community, and reducing crime and the fear of crime. The department strives to ensure that our community members feel safe to walk our streets and to picnic in our parks with their families. The department conducts police activities that help to achieve the mission, while ensuring that all people are treated with dignity and respect, without regard for a person's gender, ethnicity, race, religion, color, or sexual orientation.

## 2021-23 Accomplishments & Highlights

- Funded and piloted the implementation of the in-car video system and body camera program.
- Renegotiated the contract with Oregon Trail School District for the School Resource Officer Program.
- Replaced three aging vehicles to continue to make progress on maintaining and/or replacing outdated assets.

## Goals

- Continue to carry out the mission of the department with the utmost professionalism.
- Continue to expand health and wellness programs for staff.
- Continue to replace aging vehicles to ensure the safety and functionality of the fleet.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Calls for Service	n/a	n/a	n/a	n/a	n/a	13,203
Physical Arrests	218	472	411	421	458	649
Citations Issued	533	827	1,358	1,324	830	889
Sworn Officers per Thousand	1.50	1.47	1.46	1.44	1.37	1.24
Police Overtime Expenditures	\$ 105,516	\$ 115,803	\$ 131,674	\$ 114,573	\$ 112,898	\$ 117,772

## Staffing

	17-19	19-21	21-23	23-25
<b>Total FTE</b>	19.94	19.31	19.88	20.00



# Police

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	(159,780)	(44,426)	-	454,208	454,208
Fines, Fees, & Assessments	364,103	897,010	997,500	1,011,000	1,011,000
Interest	21,515	21,974	15,000	25,000	25,000
Intergovernmental	879,847	179,817	191,000	282,700	282,700
Grants	96,942	28,058	-	-	-
Loan Proceeds	736,239	-	300,000	-	-
Miscellaneous Revenue	3,200	-	3,000	-	-
General Revenue	4,680,030	5,660,000	6,215,000	6,670,000	6,700,000
<b>Total Resources</b>	<b>6,622,097</b>	<b>6,742,433</b>	<b>7,721,500</b>	<b>8,442,908</b>	<b>8,472,908</b>
Personnel Services	4,631,924	4,969,212	5,653,000	6,251,000	6,251,000
Materials & Services	836,508	694,640	809,675	891,000	921,000
Capital Outlay	455,781	51,925	371,000	453,000	453,000
Debt Service	227,376	185,797	317,222	161,994	161,994
Transfers	514,934	579,247	536,238	613,217	613,217
Contingency	-	-	34,365	72,697	72,697
<b>Total Requirements</b>	<b>6,666,523</b>	<b>6,480,822</b>	<b>7,721,500</b>	<b>8,442,908</b>	<b>8,472,908</b>

### BN 23-25 Budget Notes

- Intergovernmental includes revenue from Oregon Trail School District to provide School Resource Officer (SRO) functions.
- Materials & Services includes a one-time \$30,000 contribution from General Fund surplus to cover the costs of a staffing study for the Department.
- Capital Outlay includes the one-time cost of nearly \$44,000 for the final payment towards the C800 Radio system, purchase of new computers for \$73,000, and the purchase of four new vehicles totaling \$280,000.
- Debt Service includes the interfund loan payment to the Transit Fund.

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-030-401100	Beginning Balance	(159,780)	(44,426)	-	454,208	454,208
110-030-440300	Federal Grants	96,942	28,058	-	-	-
110-030-441160	State Shared - Marijuana Tax	31,716	-	-	-	-
110-030-442500	Other Agencies	724,381	-	-	-	-
110-030-442701	Oregon Trail SD SRO	123,750	179,817	191,000	282,700	282,700
110-030-443000	Public Safety Fee	-	504,915	557,000	567,000	567,000
110-030-456100	Police Reports	4,292	5,512	5,000	6,000	6,000
110-030-456300	Fingerprinting	495	1,764	15,000	15,000	15,000
110-030-456400	Vehicle Impound	5,767	4,750	5,000	1,000	1,000
110-030-456500	Police Witness Fees	-	-	500	-	-
110-030-456605	Alarm Program	12,032	22,865	25,000	30,000	30,000
110-030-456800	Police Asset Forfeiture	1,564	2,258	-	2,000	2,000
110-030-466100	Municipal Court Fines	284,992	320,862	350,000	350,000	350,000
110-030-466200	Other Jurisdiction Court Fines	54,961	34,085	40,000	40,000	40,000
110-030-471101	Collection Interest	2,423	6,328	5,000	10,000	10,000
110-030-478030	Miscellaneous Revenue	19,093	15,646	10,000	15,000	15,000
110-030-479030	Surplus Property	3,200	-	3,000	-	-
110-030-490139	Transfer from Non-Departmental	100,000	-	-	-	30,000
110-030-491110	General Revenue	4,580,030	5,660,000	6,215,000	6,670,000	6,670,000
110-030-495300	Interfund Loan Proceeds	356,272	-	-	-	-
110-030-495400	Loan Proceeds	379,967	-	300,000	-	-
<b>Total Resources</b>		<b>6,622,097</b>	<b>6,742,433</b>	<b>7,721,500</b>	<b>8,442,908</b>	<b>8,472,908</b>

Requirements are listed on the following page.

## Police

110-030-511100	Salaries	2,696,138	2,848,148	3,152,000	3,508,000	3,508,000
110-030-511200	Overtime	247,477	227,471	250,000	250,000	250,000
110-030-511210	Overtime - Estacada	23,129	-	-	-	-
110-030-521100	Insurance Benefits	487,805	534,286	785,000	795,000	795,000
110-030-521200	FICA Taxes	227,459	235,087	260,000	287,000	287,000
110-030-521300	PERS	738,248	878,745	1,036,000	1,212,000	1,212,000
110-030-521360	Other Benefits	106,462	79,769	17,000	42,000	42,000
110-030-521500	Workers' Benefit Fund	2,020	1,679	3,000	2,000	2,000
110-030-521600	Unemployment Insurance	2,951	3,042	3,000	15,000	15,000
110-030-521700	Paid Leave Oregon Tax	-	-	-	15,000	15,000
110-030-521800	Workers' Comp Insurance	82,378	142,532	126,000	102,000	102,000
110-030-521900	Transit Tax	17,856	18,454	21,000	23,000	23,000
110-030-601100	Supplies	15,186	11,345	14,000	17,000	17,000
110-030-601200	Postage	1,805	1,565	1,500	1,800	1,800
110-030-601300	Printing	1,283	564	1,000	1,000	1,000
110-030-601400	Copier Charges	478	306	600	600	600
110-030-601401	Branding & Marketing	242	-	250	400	400
110-030-601500	Public Notices	84	-	100	-	-
110-030-601700	Memberships	1,502	1,478	1,500	1,700	1,700
110-030-601800	Books and Subscriptions	-	-	500	500	500
110-030-601900	Uniforms	7,909	14,540	12,000	13,500	13,500
110-030-602000	Uniform Cleaning	2,459	451	500	200	200
110-030-602100	Employee Recruitment	822	-	-	1,500	1,500
110-030-602200	Conferences	2,967	711	2,500	-	-
110-030-602300	Training & Professional Advancement	14,977	10,227	31,000	30,000	30,000
110-030-602500	Meetings & Meals	2,077	1,685	1,700	3,500	3,500
110-030-603100	Mileage Reimbursement	385	-	300	800	800
110-030-603200	Vehicle Fuel	83,163	54,006	60,000	75,000	75,000
110-030-603400	Vehicle Reg/Licenses	115	10	225	-	-
110-030-603500	Vehicle Repair & Maintenance	49,508	34,335	35,000	40,000	40,000
110-030-604100	Repairs & Maintenance	17,306	17,839	17,000	33,000	33,000
110-030-605100	Contractual Services	48,087	26,352	65,000	50,000	50,000
110-030-606100	Equipment Rental	-	-	-	-	-
110-030-607100	Utilities	54,675	48,047	50,000	50,000	50,000
110-030-608100	Professional Services	103,353	62,359	58,000	75,000	105,000
110-030-609100	Insurance	107,506	132,714	152,000	139,000	139,000
110-030-610200	Fees	3,072	4,856	4,500	2,500	2,500
110-030-630100	Ammunition/Range Practice	8,779	6,259	8,500	12,000	12,000
110-030-630300	Police County Dispatch	280,906	241,417	275,000	325,000	325,000
110-030-630350	Equipment	23,721	23,168	17,000	17,000	17,000
110-030-630700	Investigation	1,267	-	-	-	-
110-030-630750	Police Detoxification	2,460	155	-	-	-
110-030-630800	Police Reserves	415	250	-	-	-
110-030-740000	Furniture & Office Equipment	340	-	-	-	-
110-030-740100	Computer Equipment	99,125	3,497	71,000	73,000	73,000
110-030-740120	800 MHz Radio System	70,686	39,560	-	100,000	100,000
110-030-750000	Vehicles	285,631	8,868	300,000	280,000	280,000
110-030-812100	Loan Principal	223,426	185,231	238,228	83,000	83,000
110-030-812200	Interfund Loan Principal	-	-	68,496	71,152	71,152
110-030-830001	Interfund Loan Interest	-	-	10,498	7,842	7,842
110-030-832903	Loan Interest	3,950	566	-	-	-
110-030-910670	Transfer to Op Center IS Fund	5,813	7,163	7,163	12,100	12,100
110-030-911110	Indirect Support Cost	509,121	572,084	529,075	601,117	601,117
110-030-951000	Contingency	-	-	34,365	72,697	72,697
<b>Total Requirements</b>		<b>6,666,523</b>	<b>6,480,822</b>	<b>7,721,500</b>	<b>8,442,908</b>	<b>8,472,908</b>

# Human Resources

## Department Overview

The Human Resources Department is dedicated to serving all departments of the City of Sandy in recruitment, development, and retention of a high-quality workforce that is committed to excellence in public service. The department is responsible for comprehensive human resources services and programs, including job description development, recruitment and selection, employee orientation, benefit administration, labor relations, training, personnel policy development and administration, personnel record management, workers' compensation claim management, and employee recognition.

## 2021-23 Accomplishments & Highlights

- Comprehensive update to the personnel policy manual for the first time in over five years.
- Review of all positions and their placement on the salary schedule in relation to Oregon's Pay Equity law.

## Goals

- Provide employee training programs to help all employees improve skills, and acquire new knowledge and confidence related to career development.
- Forecast current and future staffing needs to assist Finance in maintaining service levels, mitigate risks, and manage key projects and programs.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Total Employee Count	78	104	87	83	75	85
Workers' Comp Claims	4	6	10	5	7	3

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	-	-	-	1.20

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	-	-	-	-	-
Indirect Service Revenue	-	-	-	426,550	426,550
<b>Total Resources</b>	-	-	-	<b>426,550</b>	<b>426,550</b>
Personnel Services	-	-	-	390,300	390,300
Materials & Services	-	-	-	29,750	29,750
Contingency	-	-	-	6,500	6,500
<b>Total Requirements</b>	-	-	-	<b>426,550</b>	<b>426,550</b>

Human Resources consolidated with Finance prior to BN 23-25

## Human Resources

### BN 23-25 Budget Notes

- 92% of the overall budget is directly related to the cost of staff to perform the required human resources functions.
- Staffing and related personnel costs reflect the Human Resources Director and 20% of the Accounting Specialist positions, which were previously in the Finance budget.
- Contingency set to approximately 2% of the department's operating budget.

Account Number	Account Name	BN 17-19	BN 19-21	BN 21-23	BN 23-25	BN 23-25
		Actual	Actual	Budget	Proposed	Approved
110-032-401100	Beginning Balance	-	-	-	-	-
110-032-492110	Indirect Service Revenue	-	-	-	426,550	426,550
<b>Total Resources</b>		-	-	-	<b>426,550</b>	<b>426,550</b>
110-032-511100	Salaries	-	-	-	251,000	251,000
110-032-511200	Overtime	-	-	-	-	-
110-032-521100	Insurance Benefits	-	-	-	45,000	45,000
110-032-521200	FICA Taxes	-	-	-	20,000	20,000
110-032-521300	PERS	-	-	-	70,000	70,000
110-032-521500	Workers' Benefit Fund	-	-	-	200	200
110-032-521600	Unemployment Insurance	-	-	-	1,000	1,000
110-032-521700	Paid Leave Oregon Tax	-	-	-	1,200	1,200
110-032-521800	Workers' Comp Insurance	-	-	-	400	400
110-032-521900	Transit Tax	-	-	-	1,500	1,500
110-032-601100	Supplies	-	-	-	5,000	5,000
110-032-601200	Postage	-	-	-	250	250
110-032-601401	Branding & Marketing	-	-	-	2,500	2,500
110-032-601700	Memberships	-	-	-	1,000	1,000
110-032-602100	Employee Recruitment	-	-	-	7,000	7,000
110-032-602200	Conferences	-	-	-	1,000	1,000
110-032-602500	Meetings & Meals	-	-	-	500	500
110-032-603100	Mileage Reimbursement	-	-	-	500	500
110-032-605100	Contractual Services	-	-	-	12,000	12,000
110-032-740000	Furniture & Office Equipment	-	-	-	-	-
110-032-740100	Computer Equipment	-	-	-	-	-
110-032-951000	Contingency	-	-	-	6,500	6,500
<b>Total Requirements</b>		-	-	-	<b>426,550</b>	<b>426,550</b>

# Recreation

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## Department Overview

The Recreation Department provides comprehensive recreation programs and special events designed to enhance quality of life, boost physical and mental health, and provide important social connections. The department works to keep programs affordable so all community members can access opportunities regardless of their socioeconomic status.

Diverse program opportunities are displayed throughout the year in the Recreation Guide, and are marketed through electronic newsletters, social media, traditional media, and signage. Staff work with recreation providers throughout the area to provide programming and share resources, and partner with organizations and businesses on projects that can enhance community opportunities. For example, Mountain Storm Youth Basketball and the Adult co-ed softball league are made possible by utilizing the Oregon Trail School District facilities.

Special Events prove popular with locals and draw many visitors from out of town with events including Run with Pride, Noah's Quest, Silent Disco, and Winter Lights at Meinig. Events such as Sandy Summer Sounds & Starlight Cinema, Solv-it, Longest Day Parkway, Teen Flashlight Egg Hunt, and Mountain Festival Kids Parade ensure that all families, regardless of income, enjoy recreation and entertainment opportunities in a unique setting.

## 2021-23 Accomplishments & Highlights

- Since re-establishing programs and events in May 2022, an estimated 4,000 community members have participated.
- Received nearly \$38,000 in fundraising and sponsorship for community events.
- Diversified revenue sources, analyzed new revenue streams, and hired a consultant to assist in developing a cost recovery policy where appropriate.
- Explored Council and community recreation services needs and determined how the department can support these by adding new events, programs, classes, and social services.

## Goals

- Create a recruitment, onboarding, and training process for volunteers in various areas of Parks and Recreation Services.
- Work with Oregon Trail School District to develop a new facility use agreement.
- Explore ways to connect Sandy residents with aquatic opportunities for water safety purposes.
- Continue to innovatively and strategically grow special events, programs, and services while meeting cost recovery goals.
- Build upon the newly created Holiday Lights at Meinig Park to become a regionally recognized "Winter Fest" community event that involves community partnerships and participation.

# Recreation

## Performance Measures

	2017	2018	2019	2020	2021	2022
Special Events	10	11	10	9	8	6
Special Events Participants	1,766	2,876	2,933	1,337	116	762
Adult Program Participants	2,597	1,649	1,694	1,117	485	476
Children/Teen Program Participants	936	725	1,676	615	26	190

## Staffing

	17-19	19-21	21-23	23-25
<b>Total FTE</b>	<b>2.40</b>	<b>3.08</b>	<b>3.33</b>	<b>2.48</b>

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	249,720	257,996	221,719	187,909	187,909
Fines, Fees, & Assessments	158,559	68,552	150,900	203,000	203,000
Miscellaneous Revenue	141	8,320	-	-	-
General Revenue	546,938	563,000	605,000	705,000	720,000
<b>Total Resources</b>	<b>955,358</b>	<b>897,868</b>	<b>977,619</b>	<b>1,095,909</b>	<b>1,110,909</b>
Personnel Services	427,592	456,261	727,000	625,600	625,600
Materials & Services	194,130	107,895	157,272	332,400	347,400
Capital Outlay	8,821	8,432	-	-	-
Transfers	66,820	75,025	75,847	89,124	89,124
Contingency	-	-	17,500	48,785	48,785
<b>Total Requirements</b>	<b>697,362</b>	<b>647,613</b>	<b>977,619</b>	<b>1,095,909</b>	<b>1,110,909</b>

### BN 23-25 Budget Notes

- Fines, Fees, & Assessments has increased due to additional program offerings in a post COVID-19 environment.
- Materials & Services has increased for the same reason noted above. This area also includes a one-time \$15,000 contribution from General Fund surplus to provide funding for aquatic programming and related transportation.

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-033-401100	Beginning Balance	249,720	257,996	221,719	187,909	187,909
110-033-436100	Recreation Fees - In House	79,298	34,231	72,500	4,000	4,000
110-033-436110	Recreation Fees - Contracted	-	-	-	60,000	60,000
110-033-436110	Youth Basketball Fees	36,069	17,391	32,000	42,000	42,000
110-033-436120	Special Events	31,907	15,679	22,000	4,000	4,000
110-033-436130	Adult Softball	3,114	-	20,000	21,000	21,000
110-033-436140	Pickleball	-	115	-	500	500
110-033-474000	Community Garden Rental	1,845	1,509	2,400	2,500	2,500
110-033-475000	Event and Community Sponsorship	-	-	-	67,000	67,000
110-033-475601	Concert Revenue	6,327	(373)	2,000	2,000	2,000
110-033-478000	Miscellaneous Revenue	141	8,320	-	-	-
110-033-490139	Transfer from Non-Dept.	-	-	-	-	15,000
110-033-491110	General Revenue	546,938	563,000	605,000	705,000	705,000
<b>Total Resources</b>		<b>955,358</b>	<b>897,868</b>	<b>977,619</b>	<b>1,095,909</b>	<b>1,110,909</b>

## Recreation

Requirements listed on the following page.

110-033-511100	Salaries	291,410	297,281	465,000	400,000	400,000
110-033-511101	Salaries - Seasonal/On-Call	-	4,268	28,000	-	-
110-033-511200	Overtime	186	1,331	-	-	-
110-033-521100	Insurance Benefits	30,129	31,456	41,000	69,000	69,000
110-033-521200	FICA Taxes	22,421	23,128	38,000	31,000	31,000
110-033-521300	PERS	65,828	77,117	140,000	115,000	115,000
110-033-521360	Other Benefits	8,913	7,433	-	-	-
110-033-521500	Workers' Benefit Fund	216	166	500	500	500
110-033-521600	Unemployment Insurance	289	303	500	1,600	1,600
110-033-521700	Paid Leave Oregon Tax	-	-	-	1,600	1,600
110-033-521800	Workers' Comp Insurance	6,473	11,965	11,000	4,500	4,500
110-033-521900	Transit Tax	1,729	1,814	3,000	2,400	2,400
110-033-601100	Supplies	4,051	3,373	3,500	7,500	7,500
110-033-601200	Postage	101	309	500	1,000	1,000
110-033-601300	Printing	5,249	2,889	1,000	4,300	4,300
110-033-601400	Copier Charges	1,935	1,018	1,162	1,700	1,700
110-033-601401	Branding & Marketing	721	399	4,000	10,000	10,000
110-033-601700	Books and Subscriptions	755	1,079	1,000	9,000	9,000
110-033-601900	Uniforms	-	56	100	2,800	2,800
110-033-602100	Employee Recruitment	9	-	-	-	-
110-033-602200	Conferences	981	1,926	1,000	4,000	4,000
110-033-602300	Training & Professional Advancement	734	285	300	2,000	2,000
110-033-602500	Meetings & Meals	77	251	250	600	600
110-033-603100	Mileage Reimbursement	146	476	500	1,000	1,000
110-033-603200	Vehicle - Fuel	208	83	1,300	-	-
110-033-603500	Vehicle Repair & Maintenance	121	279	-	-	-
110-033-604100	Repairs & Maintenance	540	2,787	5,000	6,000	6,000
110-033-604110	Elevator Maintenance	292	916	1,000	1,500	1,500
110-033-605100	Contractual Services	11,790	12,046	9,000	20,000	20,000
110-033-607100	Utilities	15,261	13,851	15,000	15,000	15,000
110-033-609100	Insurance	5,583	8,769	4,500	4,500	4,500
110-033-633100	Program - Recreation - In House	57,461	20,112	54,460	2,000	2,000
110-033-633110	Program - Recreation - Contracted	-	-	-	48,000	63,000
110-033-633200	Program - Youth Basketball	17,350	2,586	15,500	30,000	30,000
110-033-633300	Program - Adult Softball	(63)	8,417	13,200	10,000	10,000
110-033-633400	Program - Concerts in Park	35,195	4,418	4,000	30,000	30,000
110-033-633500	Program - Movies in Park	8,847	9,699	6,000	10,000	10,000
110-033-633700	Program - Special Events	26,765	11,554	10,000	15,000	15,000
110-033-633800	Program - Pickleball	-	314	-	500	500
110-033-633900	Program - Community Garden	-	-	5,000	5,000	5,000
110-033-633910	Program - Community Events	-	-	-	50,000	50,000
110-033-633920	Program - Mountain Festival	-	-	-	15,000	15,000
110-033-633930	Program - Fireworks Display	-	-	-	26,000	26,000
110-033-639100	Cash Over/Short	22	1	-	-	-
110-033-715000	Building Improvements	-	4,881	-	-	-
110-033-740000	Furniture & Office Equipment	1,094	606	-	-	-
110-033-740100	Computer Equipment	4,342	60	-	-	-
110-033-740101	Software	3,384	2,886	-	-	-
110-033-911110	Indirect Support Cost	66,820	75,025	75,847	89,124	89,124
110-033-951000	Contingency	-	-	17,500	48,785	48,785
<b>Total Requirements</b>		<b>697,362</b>	<b>647,613</b>	<b>977,619</b>	<b>1,095,909</b>	<b>1,110,909</b>

# Senior Services

## Department Overview

The Senior Services Department is the centralized location for providing information, resources, nutrition, transportation, social services, and recreation opportunities for adults 60 years and better residing within the Oregon Trail School District (exclusive of the Hoodland area).

Increased issues surrounding the isolation of seniors in rural areas, nutritional risk, access to online resources, socialization and the need for mental health services are a priority. Many clients request aid for personal issues, and assistance for adult children is needed to navigate the complex system of care for their aging parents.

The Center reopened to the public in May 2022 after having been closed due to the COVID-19 pandemic and staffing constraints for over two years. During normal operations various community groups use the facility on an ongoing basis, including AA, VFW, scout groups, sports teams/groups, and fundraising committees. The building is often rented after regular hours of operations and weekends to private individuals for birthday parties, weddings, baptisms, showers, and funeral gatherings.

## 2021-23 Accomplishments & Highlights

- Since reopening in May 2022, nearly 2,500 participants have enjoyed senior trips, classes, and other services.
- Diversified revenue sources, analyzed new revenue streams, and hired a consultant to assist in developing a cost recovery policy where appropriate.

## Goals

- Create a recruitment, onboarding, and training process for volunteers in various areas of Parks and Recreation Services.
- Integrate increased program/service collaboration with community business partners and various organizations to expand programs and services and fill identified gaps.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Senior Meals Served	19,009	20,332	26,661	23,776	20,693	15,785

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	3.62	4.78	4.96	4.31

2023-2025 Approved Budget

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City of Sandy, Oregon



# Senior Services

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	27,979	257,070	226,892	354,847	354,847
Fines, Fees, & Assessments	105,621	87,253	78,000	144,000	144,000
Grants	272,810	256,807	257,000	269,229	269,229
Miscellaneous Revenue	978	39,866	-	-	-
Transfers	175,234	-	-	-	-
General Revenue	683,047	740,000	760,000	735,000	735,000
<b>Total Resources</b>	<b>1,265,670</b>	<b>1,380,997</b>	<b>1,321,892</b>	<b>1,503,076</b>	<b>1,503,076</b>
Personnel Services	663,339	809,169	956,500	977,200	977,200
Materials & Services	244,293	213,155	193,750	313,800	313,800
Capital Outlay	10,655	16,503	-	-	-
Transfers	90,312	101,650	110,684	127,264	127,264
Contingency	-	-	60,958	84,812	84,812
<b>Total Requirements</b>	<b>1,008,599</b>	<b>1,140,477</b>	<b>1,321,892</b>	<b>1,503,076</b>	<b>1,503,076</b>

### BN 23-25 Budget Notes

- Grants include both federal and state funds received on a reimbursement basis from Clackamas County to aid in the cost of delivering services.
- Materials & Services has been increased due to an increase in certain services in a post COVID-19 environment.

# Senior Services

Account Number	Account Name	BN17-19	BN19-21	BN 21-23	BN 23-25	BN 23-25
		Actual	Actual	Budget	Proposed	Approved
110-034-401100	Beginning Balance	27,979	257,070	226,892	354,847	354,847
110-034-437100	Class & Activity Revenue	20,039	4,355	2,500	5,000	5,000
110-034-437101	Trip Revenue	-	4,800	2,500	13,000	13,000
110-034-440300	Federal Grants	182,066	193,151	174,000	143,737	143,737
110-034-441450	State Grants	87,245	63,581	83,000	125,492	125,492
110-034-442200	County Senior Citizens Grant	3,500	75	-	-	-
110-034-474200	Building Rent	18,237	6,682	10,000	56,000	56,000
110-034-475100	Nutrition Program	67,345	71,417	63,000	70,000	70,000
110-034-478000	Miscellaneous Revenue	978	39,866	-	-	-
110-034-490139	Transfer from Non-Dept.	175,234	-	-	-	-
110-034-491110	General Revenue	683,047	740,000	760,000	735,000	735,000
<b>Total Resources</b>		<b>1,265,670</b>	<b>1,380,997</b>	<b>1,321,892</b>	<b>1,503,076</b>	<b>1,503,076</b>
110-034-511100	Salaries	392,007	451,742	543,000	604,000	604,000
110-034-511103	Salary - Nutrition	43,275	50,226	50,000	-	-
110-034-511104	Salary - Alzh	14,077	18,559	17,000	-	-
110-034-511105	Salaries - On-Call	-	-	21,000	-	-
110-034-511200	Overtime	750	12,334	-	-	-
110-034-521100	Insurance Benefits	74,521	78,240	86,000	138,000	138,000
110-034-521200	FICA Taxes	34,728	41,008	48,000	47,000	47,000
110-034-521300	PERS	90,179	136,214	173,000	172,000	172,000
110-034-521360	Other Benefits	3,484	5,337	-	-	-
110-034-521500	Workers' Benefit Fund	429	372	500	500	500
110-034-521600	Unemployment Insurance	445	536	1,000	2,500	2,500
110-034-521700	Paid Leave Oregon Tax	-	-	-	2,500	2,500
110-034-521800	Workers' Comp Insurance	6,767	11,385	13,000	7,000	7,000
110-034-521900	Transit Tax	2,677	3,216	4,000	3,700	3,700
110-034-601100	Supplies	5,680	6,385	6,000	12,000	12,000
110-034-601200	Postage	1,220	1,049	1,000	1,000	1,000
110-034-601300	Printing	145	86	300	4,000	4,000
110-034-601400	Copier Charges	1,355	1,105	1,500	1,000	1,000
110-034-601401	Branding & Marketing	1,086	-	-	3,000	3,000
110-034-601700	Memberships	668	1,310	1,000	1,500	1,500
110-034-601800	Books and Subscriptions	50	29	50	5,000	5,000
110-034-601900	Uniforms	-	-	-	1,200	1,200
110-034-602100	Employee Recruitment	379	-	-	-	-
110-034-602200	Conferences	2,270	1,943	2,000	2,000	2,000
110-034-602300	Training & Professional Advancement	1,697	371	500	2,500	2,500
110-034-602500	Meetings & Meals	368	335	300	1,000	1,000
110-034-603100	Mileage Reimbursement	505	673	1,000	1,500	1,500
110-034-603200	Vehicle -Fuel	8,941	5,515	7,000	9,600	9,600
110-034-603500	Vehicle Repair & Maintenance	8,623	11,039	13,000	15,000	15,000
110-034-604100	Repairs & Maintenance	12,479	10,718	10,000	13,500	13,500
110-034-604110	Elevator Maintenance	1,647	1,529	2,000	5,000	5,000
110-034-605100	Contractual Services	17,963	15,923	16,000	18,000	18,000
110-034-607100	Utilities	15,880	13,851	15,000	15,000	15,000
110-034-609100	Insurance	5,583	8,769	4,500	4,500	4,500
110-034-610200	Fees	-	187	-	500	500
110-034-634100	Program - Senior Activities	80,999	8,467	4,000	6,000	6,000
110-034-634200	Program - Alzheimer's	1,766	299	1,500	1,500	1,500
110-034-634400	Program - Nutrition	74,963	49,521	46,000	30,000	30,000
110-034-634500	Program - Trips	-	1,144	1,100	3,500	3,500
110-034-634600	Program - Transportation	-	72,906	60,000	156,000	156,000
110-034-639100	Cash Over/Short	28	-	-	-	-
110-034-715000	Improvements	-	9,047	-	-	-
110-034-720000	Buildings	-	1,769	-	-	-
110-034-740000	Furniture & Office Equipment	3,020	2,405	-	-	-
110-034-740100	Computer Equipment	4,264	487	-	-	-
110-034-740101	Software	3,371	2,796	-	-	-
110-034-911110	Indirect Support Cost	90,312	101,650	110,684	127,264	127,264
110-034-951000	Contingency	-	-	60,958	84,812	84,812
<b>Total Requirements</b>		<b>1,008,599</b>	<b>1,140,477</b>	<b>1,321,892</b>	<b>1,503,076</b>	<b>1,503,076</b>

# Parks, Buildings, & Grounds

## Department Overview

The Parks, Buildings, & Grounds Department maintains and makes minor improvements to the City’s parks, open spaces, public spaces, and public buildings. These activities are funded primarily out of the General Fund. Three full time employees and a seasonal worker are responsible for nine city buildings and one rental dwelling; nineteen developed parks and public spaces totaling approximately 55.25 acres; 224.64 acres of natural and open space; 9.58 miles of trails including the popular Tickle Creek Trail; as well as various pedestrian paths, stairways, walkways, and trails. This program also utilizes local landscape contractors to perform regular maintenance at certain city facilities and public areas.

## 2021-23 Accomplishments & Highlights

- Incorporated biodiversity into our parks and green spaces.
- Created and implemented an integrated pest management policy.
- Completed projects at Meinig Park, including electrical upgrades and restoring pervious asphalt parking lot to address stormwater flooding issues.
- Completed repairs and upgrades to the Community Garden at Bornstedt Park.

## Goals

- Continue the department’s efforts that support Bee City and biodiversity in our parks system and natural spaces.
- Complete upgrades to Sandy Bluff Park.
- Complete construction of the Community Campus Park Project, including conducting a naming process.
- Emphasize staff training such as acquiring a pesticide applicators license or apprenticeship.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Total Parks Acreage	172	212	212	212	212	279.89
Total Trail Miles	n/a	n/a	n/a	n/a	n/a	9.58

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	2.28	3.13	3.18	3.87

# Parks, Buildings, & Grounds

## Budget Summary & Detail

	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	65,779	72,674	72,439	44,985	44,985
Fines, Fees, & Assessments	46,532	46,843	55,500	94,500	94,500
Miscellaneous Revenue	20,357	23,767	500	11,600	11,600
General Revenue	688,387	743,000	870,000	1,400,000	1,515,000
<b>Total Resources</b>	<b>821,055</b>	<b>886,284</b>	<b>998,439</b>	<b>1,551,085</b>	<b>1,666,085</b>
Personnel Services	453,343	545,371	661,000	951,400	951,400
Materials & Services	186,818	204,951	226,450	361,000	376,000
Capital Outlay	43,449	32,305	5,000	100,000	200,000
Debt Service	-	809	8,505	8,100	8,100
Transfers	64,770	73,351	82,362	109,878	109,878
Contingency	-	-	15,122	20,707	20,707
<b>Total Requirements</b>	<b>748,380</b>	<b>856,787</b>	<b>998,439</b>	<b>1,551,085</b>	<b>1,666,085</b>

### BN 23-25 Budget Notes

- General Revenue allocation has increased to cover reallocated personnel costs, increased utility expenses for irrigation, splash pad, and the new community campus park, and equipment.
- Fines, Fees, & Assessments includes revenue from both the rental property in Bornstedt Park and fees to reserve the various facilities within the parks.
- Materials & Services includes a one-time \$15,000 contribution from General Fund surplus to provide funding for mural maintenance.
- Capital Outlay includes \$100,000 to add cameras in Meinig Park, as well as a one-time \$100,000 contribution from General Fund surplus to upgrade the infrastructure in Meinig Park to support a larger Winterfest celebration.

## Parks, Buildings, & Grounds

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-035-401100	Beginning Balance	65,779	72,674	72,439	44,985	44,985
110-035-474000	Property Rental Revenue	46,632	44,143	55,000	62,000	62,000
110-035-475010	Gazebo Rental Revenue	(100)	2,700	500	30,500	30,500
110-035-475000	Community Sponsorship	-	-	-	2,000	2,000
110-035-478000	Miscellaneous Revenue	20,090	23,767	500	1,600	1,600
110-035-479030	Surplus Property	267	-	-	10,000	10,000
110-035-490139	Transfer from Non-Dept.	-	-	-	-	115,000
110-035-491110	General Revenue	688,387	743,000	870,000	1,400,000	1,400,000
<b>Total Resources</b>		<b>821,055</b>	<b>886,284</b>	<b>998,439</b>	<b>1,551,085</b>	<b>1,666,085</b>
110-035-511100	Salaries	289,615	324,953	369,000	538,000	538,000
110-035-511200	Overtime	1,496	1,183	1,500	-	-
110-035-521100	Insurance Benefits	64,045	86,907	132,000	198,000	198,000
110-035-521200	FICA Taxes	22,283	24,949	28,000	42,000	42,000
110-035-521300	PERS	63,919	89,686	106,000	148,000	148,000
110-035-521360	Other Benefits	929	448	-	-	-
110-035-521500	Workers' Benefit Fund	300	236	500	500	500
110-035-521600	Unemployment Insurance	290	326	500	2,200	2,200
110-035-521700	Paid Leave Oregon Tax	-	-	-	2,200	2,200
110-035-521800	Workers' Comp Insurance	8,727	14,726	21,000	17,000	17,000
110-035-521900	Transit Tax	1,740	1,957	2,500	3,500	3,500
110-035-601100	Supplies	17,674	13,024	13,000	15,000	15,000
110-035-601200	Postage	1	6	50	100	100
110-035-601300	Printing	-	-	-	-	-
110-035-601400	Copier Charges	1	0	-	-	-
110-035-601401	Branding & Marketing	337	-	-	-	-
110-035-601700	Memberships	250	600	1,000	500	500
110-035-601800	Books and Subscriptions	-	-	-	700	700
110-035-601900	Uniforms	1,122	1,730	1,750	3,500	3,500
110-035-602100	Employee Recruitment	308	43	200	500	500
110-035-602300	Training & Professional Advancement	1,950	530	1,500	11,000	11,000
110-035-602500	Meetings & Meals	822	-	-	-	-
110-035-603100	Mileage Reimbursement	101	100	150	200	200
110-035-603200	Vehicle - Fuel	10,367	10,505	9,000	29,000	29,000
110-035-603500	Vehicle Repair & Maintenance	3,611	4,916	2,500	-	-
110-035-604100	Repairs & Maintenance	26,156	43,041	105,000	80,000	95,000
110-035-605100	Contractual Services	1,734	14,633	11,600	11,000	11,000
110-035-606100	Equipment Rental	5,717	17,544	2,500	10,000	10,000
110-035-607100	Utilities	54,266	41,992	50,000	150,000	150,000
110-035-608100	Professional Services	41,525	38,428	10,000	25,000	25,000
110-035-609100	Insurance	14,679	13,284	18,000	19,000	19,000
110-035-610200	Fees	5,610	4,126	-	5,000	5,000
110-035-650300	Regulatory Fees	588	448	200	500	500
110-035-715000	Improvements	28,868	5,993	-	-	100,000
110-035-715010	Meinig Park	2,466	3,000	-	-	-
110-035-740000	Furniture & Office Equipment	-	-	-	-	-
110-035-760000	Machinery & Equipment	12,115	23,313	5,000	100,000	100,000
110-035-812100	Loan Principal	-	809	8,505	8,100	8,100
110-035-910670	Transfer to Op Center IS Fund	6,554	8,075	8,075	17,300	17,300
110-035-911110	Indirect Support Cost	58,216	65,276	74,287	92,578	92,578
110-035-951000	Contingency	-	-	15,122	20,707	20,707
<b>Total Requirements</b>		<b>748,380</b>	<b>856,787</b>	<b>998,439</b>	<b>1,551,085</b>	<b>1,666,085</b>

# Planning

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## Department Overview

The Planning Department is responsible for reviewing development proposals and completing long-range planning projects such as municipal code updates and relevant long-range studies identified by Council such as the Comprehensive Plan. The department is committed to serving existing and future residents with wide-ranging planning services in the belief that a growing community can remain livable and meet the needs of all community members through thoughtful and inclusive community involved planning.

## 2021-23 Accomplishments & Highlights

- Increased fees to align more closely with cost recovery efforts for the Planning Department.
- Awarded a \$50,000 grant from the Department of Land Conservation and Development (DLCD) for the Comprehensive Plan.
- Completed the visioning portion of the Comprehensive Plan.
- Integrated House Bill 2001 and Senate Bill 458 into the Sandy Development Code.
- Removed Planned Developments (PDs) from the Sandy Development Code, completed code edits to the parkland development standards and industrial design standards, and started the clear and objective audit.
- Completed the Downtown Walkability Plan and Transportation System Plan.
- Worked with developers and Public Works to plat three subdivisions.
- Processed several development projects, including but not limited to Next Adventure Phase II, The Riffle food cart facility, Barlow Trail Veterinary Clinic, the Johnson RV expansion on 362nd Drive, Cedar Creek Heights Subdivision, Bull Run Terrace Subdivision, Ten Eyck Rim Subdivision, The Bornstedt Views Subdivision, Sandy Woods II Subdivision, and the State Street Homes mixed-use facility.

## Goals

- Complete Envision Sandy 2050 and adopt the Comprehensive Plan update.
- Complete the clear and objective audit of the Sandy Development Code.
- Support the City Council in their goal to implement policy changes for new and emerging state regulations through code amendments that are responsible and reflect the community values.
- Work with the Economic Development Department to complete the Pleasant Street Master Plan.
- Adopt a revised violation schedule for the Sandy Municipal Code.
- Adopt a revised sign code and revised dark sky ordinance in Title 15 of the Sandy Municipal Code.
- Implement the Housing Production Strategy in accordance with House Bill 2003.
- Apply for a Safe Routes to School Grant with the Oregon Department of Transportation.
- Work with developers to plat subdivisions, construct apartments, and successfully open new commercial facilities while navigating the constraints of the moratorium.

# Planning

## Performance Measures

	2017	2018	2019	2020	2021	2022
<b>Total Land Use Applications</b>						
Type I	46	28	20	26	42	32
Type II	14	10	10	9	8	9
Type III	4	13	11	6	7	5
Type IV	8	7	7	10	7	5
<b>TOTAL:</b>	<b>72</b>	<b>58</b>	<b>48</b>	<b>51</b>	<b>64</b>	<b>51</b>
<b>Additional Land Use Info</b>						
Annexations:	5	3	-	1	2	-
Subdivisions:	3	3	3	1	5	1

## Staffing

	17-19	19-21	21-23	23-25
<b>Total FTE</b>	<b>1.76</b>	<b>2.86</b>	<b>2.76</b>	<b>3.22</b>

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	201,710	201,710	232,034	95,043	95,043
Fines, Fees, & Assessments	392,293	426,965	357,100	287,000	287,000
Grants	1,487	1,000	31,000	64,000	64,000
Miscellaneous Revenue	78	2,291	1,000	5,000	5,000
<b>General Revenue</b>	<b>258,145</b>	<b>280,000</b>	<b>547,000</b>	<b>920,000</b>	<b>970,000</b>
<b>Total Resources</b>	<b>853,713</b>	<b>911,966</b>	<b>1,168,134</b>	<b>1,371,043</b>	<b>1,421,043</b>
Personnel Services	391,466	533,121	638,500	908,500	908,500
Materials & Services	68,896	132,592	309,500	250,500	300,500
Capital Outlay	16,159	6,336	-	15,000	15,000
Transfers	72,082	84,406	157,028	166,231	166,231
Contingency	-	-	63,106	30,812	30,812
<b>Total Requirements</b>	<b>548,602</b>	<b>756,455</b>	<b>1,168,134</b>	<b>1,371,043</b>	<b>1,421,043</b>

### BN 23-25 Budget Notes

- Anticipated one-time grant from the Department of Land Conservation and Development for \$40,000 to assist in expenses associated with the state mandated Housing Production Strategy that is due in 2025.
- General revenue increased to offset the decline in projected planning fee revenue and account for the continued expenses for long range planning efforts.
- Anticipated grant award of \$23,000 for the remaining portion of an already awarded grant for the Comprehensive Plan.
- Personnel Services includes the addition of a code enforcement specialist, reduction of one planner position, and the reallocation of FTE.
- Materials & Services reflect \$193,000 in expenses related to contractual services for updating the Comprehensive Plan, Clear and Objective Audit, and the Housing Production Strategy, as well as a one-time \$50,000 contribution from General Fund surplus to update the City's zoning map.

# Planning

Account Number	Account Name	BN17-19	BN19-21	BN 21-23	BN 23-25	BN 23-25
		Actual	Actual	Budget	Proposed	Approved
110-036-401100	Beginning Balance	201,710	201,710	232,034	95,043	95,043
110-036-434200	Permit Administration Fee	72,872	83,815	100,000	100,000	100,000
110-036-441200	State Grants	-	-	30,000	63,000	63,000
110-036-454100	Planning & Sign Fees	266,368	264,645	200,000	120,000	120,000
110-036-454200	EC Permit 1&2 Family	15,147	30,367	20,000	30,000	30,000
110-036-454300	Zoning Administration Fee	27,940	31,232	25,000	25,000	25,000
110-036-454400	EC Plan Check	9,525	15,298	10,000	12,000	12,000
110-036-454500	Urban Forest Fees/Grants	1,487	1,000	1,000	1,000	1,000
110-036-458005	Plaza Rent Revenue	2,225	1,540	2,000	-	-
110-036-466100	Refunds	(1,826)	-	-	-	-
110-036-478000	Miscellaneous Revenue	78	2,291	1,000	5,000	5,000
110-036-478100	Document/Copy Fees	43	68	100	-	-
110-036-490139	Transfer from Non-Dept.	-	-	-	-	50,000
110-036-491110	General Revenue	258,145	280,000	547,000	920,000	920,000
<b>Total Resources</b>		<b>853,713</b>	<b>911,966</b>	<b>1,168,134</b>	<b>1,371,043</b>	<b>1,421,043</b>
110-036-511100	Salaries	270,537	367,037	427,000	547,000	547,000
110-036-511200	Overtime	1,531	2,789	-	-	-
110-036-521100	Insurance Benefits	27,455	37,506	59,000	156,000	156,000
110-036-521200	FICA Taxes	20,920	26,474	33,000	42,000	42,000
110-036-521300	PERS	53,970	83,284	112,000	151,000	151,000
110-036-521360	Other Benefits	11,846	7,822	-	-	-
110-036-521500	Workers' Benefit Fund	224	222	500	300	300
110-036-521600	Unemployment Insurance	274	346	500	2,200	2,200
110-036-521700	Paid Leave Oregon Tax	-	-	-	2,300	2,300
110-036-521800	Workers' Comp Insurance	3,068	5,564	3,500	4,400	4,400
110-036-521900	Transit Tax	1,641	2,077	3,000	3,300	3,300
110-036-601100	Supplies	5,607	3,915	8,000	6,500	6,500
110-036-601200	Postage	2,663	2,909	5,000	2,000	2,000
110-036-601300	Printing	331	706	1,000	1,000	1,000
110-036-601400	Copier Charges	1,931	1,801	1,800	2,500	2,500
110-036-601401	Branding & Marketing	134	-	600	500	500
110-036-601500	Public Notices	2,566	3,700	5,000	3,000	3,000
110-036-601700	Memberships	263	339	800	2,000	2,000
110-036-601800	Books and Subscriptions	521	138	500	2,000	2,000
110-036-602100	Employee Recruitment	120	202	500	-	-
110-036-602200	Conferences	1,581	3,003	8,000	6,000	6,000
110-036-602300	Training & Professional Advancemen	204	-	-	-	-
110-036-602500	Meetings & Meals	351	191	800	500	500
110-036-603100	Mileage Reimbursement	-	7	500	500	500
110-036-604100	Repairs & Maintenance	-	97	-	-	-
110-036-607100	Utilities	1,247	780	1,000	1,000	1,000
110-036-608200	Professional Services - Engineering	14,829	20,473	20,000	25,000	25,000
110-036-608500	Contract Services - Planning	29,068	93,548	250,000	193,000	243,000
110-036-637100	Planning Commission	1,748	723	2,000	2,000	2,000
110-036-639610	Tree City USA	5,730	59	4,000	3,000	3,000
110-036-740000	Furniture & Office Equipment	8,539	1,645	-	-	-
110-036-740100	Computer Equipment	7,620	4,691	-	15,000	15,000
110-036-911110	Indirect Support Cost	72,082	84,406	157,028	166,231	166,231
110-036-951000	Contingency	-	-	63,106	30,812	30,812
<b>Total Requirements</b>		<b>548,602</b>	<b>756,455</b>	<b>1,168,134</b>	<b>1,371,043</b>	<b>1,421,043</b>



# Building

## Department Overview

The Building Department is committed to serving existing and future community members with comprehensive administration of building, plumbing, mechanical, and fire/life/safety codes as required by the State of Oregon. This division ensures that commercial and industrial buildings, residential dwellings, and public buildings such as schools are constructed in conformance with all regulatory codes to ensure continued safety and well-being for all people. Administrative staff also manage the business licensing program and other miscellaneous duties.

## 2021-23 Accomplishments & Highlights

- Increased fees to increase cost recovery for the Building Division.
- Adopted new code provisions in Chapter 15.04 of the Sandy Municipal Code.
- Inspected and approved occupancy for development projects, including but not limited to the Sandy Behavioral Health Center, Hood Street Daycare, FreeUp Storage, Mt. Hood Senior Living, Space Age Gas Station, Foothills Apartments, numerous covered structures, and over 110 single family homes.
- Launched the first online business license program in the City’s history.

## Goals

- Continue to increase fees and look for opportunities to increase cost recovery for the Building Division.
- Implement electronic plan review by January 1, 2025, in accordance with House Bill 2415.
- Increase accessibility of regulations by creating a more robust FAQ on the City website and through the creation of more accessible punch lists for business owners and residents.

## Performance Measures

	2017	2018	2019	2020	2021	2022
<b>Total Trade Permits Issued</b>						
Single Family	62	42	57	81	61	67
Multi Family Buildings	3	12	5	2	6	-
MFR # of units	13	145	50	4	69	-
Commercial	74	101	91	47	76	77

## Staffing

	17-19	19-21	21-23	23-25
<b>Total FTE</b>	2.70	3.03	2.50	2.25

# Building

## Budget Summary & Detail

	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	591,042	567,903	360,677	405,203	405,203
Fines, Fees, & Assessments	757,475	744,291	599,000	710,000	710,000
<b>Total Resources</b>	<b>1,348,517</b>	<b>1,312,194</b>	<b>959,677</b>	<b>1,115,203</b>	<b>1,115,203</b>
Personnel Services	576,046	703,796	614,000	649,000	649,000
Materials & Services	87,189	78,812	85,100	103,100	103,100
Capital Outlay	13,540	4,438	-	15,000	15,000
Transfers	103,839	123,297	113,105	101,961	101,961
Contingency	-	-	147,472	246,142	246,142
<b>Total Requirements</b>	<b>780,614</b>	<b>910,343</b>	<b>959,677</b>	<b>1,115,203</b>	<b>1,115,203</b>

### BN 23-25 Budget Notes

- The department is fully funded through permit fees and receives no general revenue funding.
- Capital Outlay reflects \$15,000 in expenses related to new copier/scanner equipment.

# Building

Account Number	Account Name	BN 17-19	BN 19-21	BN 21-23	BN 23-25	BN 23-25
		Actual	Actual	Budget	Proposed	Approved
110-037-401100	Beginning Balance	591,042	567,903	360,677	405,203	405,203
110-037-433110	Permits - Building	319,353	331,455	290,000	320,000	320,000
110-037-433120	Permits - Plumbing	142,637	110,979	110,000	110,000	110,000
110-037-433130	Permits - Mechanical	39,385	48,163	44,000	50,000	50,000
110-037-433140	Permits - Fire Life & Safety	33,865	5,563	8,000	10,000	10,000
110-037-433400	Permits - Other Building	17,449	12,814	10,000	20,000	20,000
110-037-433910	Permits - State %	57,538	53,867	55,000	60,000	60,000
110-037-433920	Permits - State M H Fee	60	179,242	-	140,000	140,000
110-037-434100	Plan Check Fee	146,621	-	80,000	-	-
110-037-434150	Building Administration Fee	550	2,209	2,000	-	-
110-037-491110	General Revenue	17	-	-	-	-
<b>Total Resources</b>		<b>1,348,517</b>	<b>1,312,194</b>	<b>959,677</b>	<b>1,115,203</b>	<b>1,115,203</b>
110-037-511100	Salaries	384,329	458,430	378,000	401,000	401,000
110-037-511200	Overtime	9,046	5,527	-	-	-
110-037-521100	Insurance Benefits	63,619	75,814	100,000	96,000	96,000
110-037-521200	FICA Taxes	30,238	36,197	29,000	31,000	31,000
110-037-521300	PERS	75,106	112,159	100,000	111,000	111,000
110-037-521360	Other Benefits	6,235	4,030	-	-	-
110-037-521500	Workers' Benefit Fund	303	281	500	300	300
110-037-521600	Unemployment Insurance	396	473	500	1,700	1,700
110-037-521700	Paid Leave Oregon Tax	-	-	-	1,700	1,700
110-037-521800	Workers' Comp Insurance	4,403	8,046	3,500	3,800	3,800
110-037-521900	Transit Tax	2,372	2,839	2,500	2,500	2,500
110-037-601100	Supplies	3,860	3,999	7,000	8,000	8,000
110-037-601200	Postage	548	219	300	300	300
110-037-601300	Printing	189	598	1,000	1,000	1,000
110-037-601400	Copier Charges	1,139	1,220	1,200	1,500	1,500
110-037-601401	Branding & Marketing	36	-	500	500	500
110-037-601700	Memberships	1,555	1,565	1,600	1,800	1,800
110-037-601800	Books and Subscriptions	4,035	1,662	3,000	3,500	3,500
110-037-601900	Uniforms	398	195	1,000	1,000	1,000
110-037-602200	Conferences	275	-	3,000	3,000	3,000
110-037-602300	Training & Professional Advancement	2,188	225	-	-	-
110-037-602500	Meetings & Meals	149	40	500	500	500
110-037-605100	Contractual Services	336	2,218	4,000	10,000	10,000
110-037-605101	Contractual Services - Planning	470	470	-	-	-
110-037-605103	Contractual Services - Plumbing	3,150	3,150	-	-	-
110-037-607100	Utilities	2,887	780	2,000	1,000	1,000
110-037-608200	Professional Services - Engineering	-	-	1,000	1,000	1,000
110-037-608500	Contract Services - Planning	4,074	-	-	-	-
110-037-628200	Credit Card Merchant Fee	1,825	6,419	4,000	10,000	10,000
110-037-637200	State Bldg Fee Surcharge	60,075	56,051	55,000	60,000	60,000
110-037-740000	Furniture & Office Equipment	8,512	1,801	-	-	-
110-037-740100	Computer Equipment	5,027	2,637	-	15,000	15,000
110-037-911110	Indirect Support Cost	103,839	123,297	113,105	101,961	101,961
110-037-951000	Contingency	-	-	147,472	246,142	246,142
<b>Total Requirements</b>		<b>780,614</b>	<b>910,343</b>	<b>959,677</b>	<b>1,115,203</b>	<b>1,115,203</b>

# Economic Development

## Department Overview

The Economic Development Department acts as a liaison between the business community and City Hall. The overall goal of this division is to facilitate growth and development of the local business community through business recruitment and retention, site acquisition, assistance with business financing, tourism development, development and management of grant programs targeting specific types of businesses, and the overall improvement/development of the downtown commercial area to attract and retain businesses.

## 2021-23 Accomplishments & Highlights

- Managed 27 urban renewal-funded business incentive grants, totaling nearly \$700,000.
- Worked with the Economic Development Advisory Board to develop the City’s first Economic Development Strategic Plan.
- Managed the downtown maintenance program to address encampments and public right-of-way maintenance.
- Represented the City in regional forums including the Highway 26 Steering Committee and Mount Hood Economic Alliance.

## Goals

- Begin implementation of Economic Development Strategic Plan; recruit businesses to Sandy in alignment with the goals and strategies identified in the plan.
- Work with Council toward adoption and implementation of the Pleasant Street Master Plan.
- Facilitate business recruitment in new 362<sup>nd</sup> Avenue / Bell Street area.
- Continue downtown beautification and address vacant buildings.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Business Licenses Issued/Renewed	867	893	904	836	820	769
Incentive Grants						
Number of grant projects completed	4	19	23	33	17	10
Net project cost - City only	\$ 77,938	\$ 156,637	\$ 293,924	\$ 360,110	\$ 287,987	\$ 405,020

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	0.80	0.50	0.58	0.40

# Economic Development

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	5,220	29,595	62,321	44,204	44,204
Grants	38,500	-	-	-	-
Miscellaneous Revenue	100	8,020	-	-	-
General Revenue	343,680	242,000	224,000	200,000	255,000
<b>Total Resources</b>	<b>387,500</b>	<b>279,614</b>	<b>286,321</b>	<b>244,204</b>	<b>299,204</b>
Personnel Services	147,733	100,642	138,200	107,600	107,600
Materials & Services	174,823	78,519	99,300	98,750	153,750
Capital Outlay	2,833	2,498	-	-	-
Transfers	32,517	38,997	24,510	27,202	27,202
Contingency	-	-	24,311	10,652	10,652
<b>Total Requirements</b>	<b>357,905</b>	<b>220,657</b>	<b>286,321</b>	<b>244,204</b>	<b>299,204</b>

### BN 23-25 Budget Notes

- Materials & Services includes \$85,000 in various grant programs, including SSCP and Tenant Improvement (TI), as well as a one-time \$55,000 contribution from General Fund surplus to provide business grants for lighting during Winterfest.

## Economic Development

Account Number	Account Name	BN 17-19	BN 19-21	BN 21-23	BN 23-25	BN 23-25
		Actual	Actual	Budget	Proposed	Approved
110-038-401100	Beginning Balance	5,220	29,595	62,321	44,204	44,204
110-038-441450	County Grants	38,500	-	-	-	-
110-038-478000	Miscellaneous Revenue	100	8,020	-	-	-
110-038-490139	Transfer from Non-Dept.	-	-	-	-	55,000
110-038-491110	General Revenue	343,680	242,000	224,000	200,000	200,000
<b>Total Resources</b>		<b>387,500</b>	<b>279,614</b>	<b>286,321</b>	<b>244,204</b>	<b>299,204</b>
110-038-511100	Salaries	103,218	69,233	93,000	72,000	72,000
110-038-511200	Overtime	236	119	-	-	-
110-038-521100	Insurance Benefits	13,066	7,766	12,000	8,000	8,000
110-038-521200	FICA Taxes	8,016	5,347	7,000	6,000	6,000
110-038-521300	PERS	19,872	16,285	25,000	20,000	20,000
110-038-521360	Other Benefits	2,330	1,217	-	-	-
110-038-521500	Workers' Benefit Fund	83	42	100	100	100
110-038-521600	Unemployment Insurance	105	70	100	400	400
110-038-521700	Paid Leave Oregon Tax	-	-	-	400	400
110-038-521800	Workers' Comp Insurance	178	144	500	200	200
110-038-521900	Transit Tax	629	419	500	500	500
110-038-601100	Supplies	713	766	3,000	2,750	2,750
110-038-601200	Postage	178	8	100	100	100
110-038-601300	Printing	57	-	-	-	-
110-038-601400	Copier Charges	97	303	200	-	-
110-038-601401	Branding & Marketing	-	206	1,000	1,000	1,000
110-038-601700	Memberships	2,405	1,415	2,500	2,000	2,000
110-038-601800	Books and Subscriptions	-	10	-	100	100
110-038-602200	Conferences	1,399	-	2,500	3,000	3,000
110-038-602300	Training & Professional Advancement	1,902	949	500	300	300
110-038-602500	Meetings & Meals	234	753	500	500	500
110-038-603100	Mileage Reimbursement	1,028	107	1,000	1,000	1,000
110-038-604100	Repairs & Maintenance	89	365	-	-	-
110-038-605100	Contractual Services	2,588	44	3,000	3,000	3,000
110-038-606120	Building Rent	-	732	-	-	-
110-038-607100	Utilities	645	-	-	-	-
110-038-639607	Downtown Flower Baskets	52,760	-	-	-	-
110-038-639608	Program - Contributions SSCP	50,000	46,442	60,000	60,000	60,000
110-038-639609	Program - Tenant Improvements	32,227	5,415	25,000	25,000	25,000
110-038-639610	Program - County Grants	28,500	10,005	-	-	-
110-038-639619	Program - Business Grants	-	11,000	-	-	55,000
110-038-740000	Furniture & Office Equipment	2,833	2,498	-	-	-
110-038-911110	Indirect Support Cost	32,517	38,997	24,510	27,202	27,202
110-038-951000	Contingency	-	-	24,311	10,652	10,652
<b>Total Requirements</b>		<b>357,905</b>	<b>220,657</b>	<b>286,321</b>	<b>244,204</b>	<b>299,204</b>

## Non-Departmental

### Department Overview

The Non-Departmental Department includes expenditures that do not apply to a single department, and miscellaneous expenses that are not associated with any of the operating departments. Additionally, this department is responsible for expenses related to the City such as memberships and association fees. The department includes the General Fund (i.e., not allocated to specific programs) contingency account.

### 2021-23 Accomplishments & Highlights

- Funded two business grants to construct structures for outdoor dining at local restaurants.

### Goals

- Continue to increase the overall contingency for the City to use as a rainy-day fund for unexpected expenditures.

### Staffing

	17-19	19-21	21-23	23-25
<b>Total FTE</b>	0.40	-	-	-

### Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	309,457	130,004	633,458	2,032,223	2,032,223
Loan Proceeds	22,513	-	25,000	-	-
Miscellaneous Revenue	46,180	192,149	20,000	-	-
Indirect Service Revenue	185,098	259,000	262,000	245,000	281,000
General Revenue	950,915	741,000	2,925,000	1,210,000	1,210,000
<b>Total Resources</b>	<b>1,514,163</b>	<b>1,322,153</b>	<b>3,865,458</b>	<b>3,487,223</b>	<b>3,523,223</b>
Materials & Services	439,105	619,344	496,000	678,000	678,000
Capital Outlay	50,272	10,278	25,000	15,000	15,000
Debt Service	124,006	9,005	9,200	-	-
Transfers	770,777	160,000	85,000	685,000	1,680,000
Contingency	-	-	3,250,258	2,109,223	1,150,223
<b>Total Requirements</b>	<b>1,384,159</b>	<b>798,627</b>	<b>3,865,458</b>	<b>3,487,223</b>	<b>3,523,223</b>

### BN 23-25 Budget Notes

- The Non-Departmental budget includes the receipt of American Rescue Plan Act (ARPA) funds for general revenue loss that have been allocated to Council priorities in the BN 21-23 biennium and available as a resource for general government purposes in the BN 23-25.
- Transfers include the allocation of ARPA funds to various departments for programs that meet the Council Goals.
- Contingency maintained at 5% of general fund operating costs (\$1,150,000).

# Non-Departmental

Account Number	Account Name	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-039-401100	Beginning Balance	309,457	130,004	633,458	2,032,223	2,032,223
110-039-477000	Merchandise	242	128	-	-	-
110-039-478000	Miscellaneous Revenue	24,559	182,521	-	-	-
110-039-478200	Reimbursement	21,112	9,500	20,000	-	-
110-039-479000	Surplus Property	267	-	-	-	-
110-039-490280	Transfer from Aquatics	-	-	-	-	36,000
110-039-491110	General Revenue	950,915	741,000	2,925,000	1,210,000	1,210,000
110-039-492110	Indirect Service Revenue	185,098	259,000	262,000	245,000	245,000
110-039-495400	Loan Proceeds	22,513	-	25,000	-	-
<b>Total Resources</b>		<b>1,514,163</b>	<b>1,322,153</b>	<b>3,865,458</b>	<b>3,487,223</b>	<b>3,523,223</b>
110-039-601100	Supplies	24,897	35,311	40,000	45,000	45,000
110-039-601200	Postage	3,396	2,602	2,000	4,000	4,000
110-039-601300	Printing	173	83	1,000	1,000	1,000
110-039-601400	Copier Charges	902	2,458	2,000	2,000	2,000
110-039-601401	Branding & Marketing	12,271	5,177	5,000	2,000	2,000
110-039-601500	Public Notices	143	653	1,000	1,000	1,000
110-039-601600	Organizational Fees	11,706	41,837	20,000	84,000	84,000
110-039-601700	Memberships	9,785	1,719	1,000	3,000	3,000
110-039-601800	Books and Subscriptions	323	699	1,000	15,000	15,000
110-039-602300	Training & Professional Advancement	1,163	-	-	-	-
110-039-602500	Meetings & Meals	60	-	-	-	-
110-039-603200	Vehicle - Fuel	2,347	275	500	1,000	1,000
110-039-603500	Vehicle Repair & Maintenance	937	168	1,000	1,000	1,000
110-039-604100	Repairs & Maintenance	11,118	19,953	15,000	10,000	10,000
110-039-605100	Contractual Services	51,332	77,886	75,000	100,000	100,000
110-039-607100	Utilities	58,721	55,490	60,000	75,000	75,000
110-039-608100	Professional Services	60,092	38,238	45,000	20,000	20,000
110-039-609100	Insurance	69,603	74,820	154,000	248,000	248,000
110-039-610200	Fees	7,602	10,248	1,000	5,000	5,000
110-039-624400	Election Expenses	53	-	500	-	-
110-039-628200	Credit Card Merchant Fee	6,728	7,502	8,000	9,000	9,000
110-039-639100	Cash Over/Short	(137)	(281)	-	-	-
110-039-639201	Cable Programming	22,101	28,684	20,000	22,000	22,000
110-039-639202	Program - Web Site	729	20,617	3,000	10,000	10,000
110-039-639301	Program - Mountain Festival	2,861	9,116	10,000	-	-
110-039-639401	Program - Employee Recognition	9,927	5,178	10,000	20,000	20,000
110-039-639402	Program - Wellness Program	339	-	-	-	-
110-039-639403	Program - Gym Fees	44,597	4,069	-	-	-
110-039-639500	Program - Community Events	2,032	-	-	-	-
110-039-639505	Program - Safety Meetings	722	-	-	-	-
110-039-639604	Program - Tourism Promotion	80	80	-	-	-
110-039-639619	Program - Business Grants	-	161,006	-	-	-
110-039-639703	Program - Fireworks Display	17,040	14,500	20,000	-	-
110-039-639810	Program - Arts Commission	5,464	1,259	-	-	-
110-039-721000	City Hall Improvements - Structural	225	-	-	-	-
110-039-740000	Furniture & Office Equipment	-	-	-	10,000	10,000
110-039-740100	Computer Equipment	6,126	-	-	-	-
110-039-740101	Archive Equipment/Software	10,278	10,278	-	-	-
110-039-760000	Machinery & Equipment	33,643	-	25,000	5,000	5,000
110-039-812100	Principal	124,006	9,005	9,200	-	-
110-039-910124	Transfer to Council	-	-	-	-	500,000
110-039-910125	Transfer to Administration	-	25,000	-	-	-
110-039-910126	Transfer to Legal	18,275	50,000	-	-	-
110-039-910129	Transfer to Library	-	-	-	-	150,000
110-039-910130	Transfer to Police	100,000	-	-	-	30,000
110-039-910133	Transfer to Recreation	-	-	-	-	15,000
110-039-910134	Transfer to Senior Center	175,234	-	-	-	-
110-039-910135	Transfer to Parks, Buildings, & Grounds	-	-	-	-	115,000
110-039-910136	Transfer to Planning	-	-	-	-	50,000
110-039-910138	Transfer to Economic Development	-	-	-	-	55,000
110-039-910140	Transfer to IT	-	-	-	-	30,000
110-039-910240	Transfer to Street Fund	-	-	-	600,000	600,000
110-039-910280	Transfer to Aquatic/Rec Fund	350,000	-	-	-	-
110-039-910350	Transfer to Parks Cap. Project Fund	42,268	-	-	-	-
110-039-910560	Transfer to SandyNet	-	-	-	-	50,000
110-039-910670	Transfer to Facilities Maint. Fund	85,000	85,000	85,000	85,000	85,000
110-039-955000	Contingency	-	-	3,250,258	2,109,223	1,150,223
<b>Total Requirements</b>		<b>1,384,159</b>	<b>798,627</b>	<b>3,865,458</b>	<b>3,487,223</b>	<b>3,523,223</b>



# Information Technology

## Department Overview

The Information Technology (IT) department is responsible for supporting all City departments with the implementation and maintenance of technology needs. Infrastructure supported includes computer systems, Voice over IP (VOIP) phone system, and IP networks at each City facility, optically connecting all City facilities.

## 2021-23 Accomplishments & Highlights

- Implement two-factor authentication for all City devices.
- Made progress in securing systems and information and overall cyber security.

## Goals

- Replace aging technology equipment to meet the overall needs of each department within the organization.
- Continue to focus on securing systems and information to prevent security breaches.

## Staffing

	17-19	19-21	21-23	23-25
<b>Total FTE</b>	1.30	1.30	1.30	1.30

## Budget Summary & Detail

	BN 17-19	BN 19-21	BN 21-23	BN 23-25	BN 23-25
	Actual	Actual	Budget	Proposed	Approved
Beginning Balance	40,068	104,152	26,122	50,016	50,016
Miscellaneous Revenue	-	10,284	-	-	-
Indirect Service Revenue	476,987	475,000	508,000	702,034	732,034
<b>Total Resources</b>	<b>517,055</b>	<b>589,436</b>	<b>534,122</b>	<b>752,050</b>	<b>782,050</b>
Personnel Services	230,100	257,611	329,500	346,500	346,500
Materials & Services	122,051	276,093	172,700	168,050	198,050
Capital Outlay	25,306	50,696	30,000	225,000	225,000
Debt Service	35,446	-	-	-	-
Contingency	-	-	1,922	12,500	12,500
<b>Total Requirements</b>	<b>412,903</b>	<b>584,399</b>	<b>534,122</b>	<b>752,050</b>	<b>782,050</b>

## BN 23-25 Budget Notes

- Materials & Services includes a one-time \$30,000 contribution from General Fund surplus to increase cyber resiliency.
- Capital Outlay increased significantly to account for investment in critical infrastructure for the IT needs of the city which includes phones, switches, virtual server, firewall, and a backup system.
- Contingency is approximately 5% of the operating budget for the department.

## Information Technology

Account Number	Account Name	BN 17-19	BN 19-21	BN 21-23	BN 23-25	BN 23-25
		Actual	Actual	Budget	Proposed	Approved
110-040-401100	Beginning Balance	40,068	104,152	26,122	50,016	50,016
110-040-478000	Miscellaneous Revenue	-	10,284	-	-	-
110-040-490139	Transfer from Non-Dept.	-	-	-	-	30,000
110-040-492110	Indirect Service Revenue	476,987	475,000	508,000	702,034	702,034
<b>Total Resources</b>		<b>517,055</b>	<b>589,436</b>	<b>534,122</b>	<b>752,050</b>	<b>782,050</b>
110-040-511100	Salaries	163,111	185,451	200,000	225,000	225,000
110-040-511200	Overtime	16	-	-	-	-
110-040-521100	Insurance Benefits	27,372	20,991	52,000	35,000	35,000
110-040-521200	FICA Taxes	12,605	14,164	16,000	18,000	18,000
110-040-521300	PERS	24,429	33,607	52,000	62,000	62,000
110-040-521360	Other Benefits	1,026	1,748	-	-	-
110-040-521500	Workers' Benefit Fund	132	147	500	200	200
110-040-521600	Unemployment Insurance	165	185	500	1,000	1,000
110-040-521700	Paid Leave Oregon Tax	-	-	-	1,000	1,000
110-040-521800	Workers' Comp Insurance	257	208	7,000	2,800	2,800
110-040-521900	Transit Tax	989	1,111	1,500	1,500	1,500
110-040-601100	Supplies	5,172	1,120	3,000	10,000	10,000
110-040-601200	Postage	-	225	-	-	-
110-040-602100	Employee Recruitment	828	349	500	500	500
110-040-602200	Conferences	-	-	3,000	3,000	3,000
110-040-602300	Training & Professional Advancement	6,400	-	2,000	2,000	2,000
110-040-602500	Meetings & Meals	589	104	200	350	350
110-040-603100	Mileage Reimbursement	399	-	-	200	200
110-040-604100	Repairs & Maintenance	8,122	265	8,000	10,000	10,000
110-040-605100	Contractual Services	92,592	271,609	150,000	140,000	170,000
110-040-607100	Utilities	2,535	920	2,000	2,000	2,000
110-040-639202	Web Site	5,415	1,500	4,000	-	-
110-040-740000	Furniture & Office Equipment	5,068	31,104	-	-	-
110-040-740100	Computer Equipment	19,972	19,591	30,000	225,000	225,000
110-040-740201	Phone Equipment	266	-	-	-	-
110-040-812100	Loan Principal	34,025	-	-	-	-
110-040-832903	Loan Interest	1,421	-	-	-	-
110-040-951000	Contingency	-	-	1,922	12,500	12,500
<b>Total Requirements</b>		<b>412,903</b>	<b>584,399</b>	<b>534,122</b>	<b>752,050</b>	<b>782,050</b>

# Hoodland Library

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## Department Overview

The Hoodland Library became a branch of the Sandy Library after the passage in November 2008 of the county-wide Library Service District. The Hoodland Service Area extends from Wildcat Creek Road to the County boundary near Government Camp and houses over 5,700 unincorporated Clackamas County residents. The Hoodland Library resides in a rented space of 1,909 square feet and will be open this coming year 38 hours per week.

Like the Sandy Library, the Hoodland Library supports the community in its endeavors to create lifelong readers. Support is provided to help residents learn to read and write, develop the ability to find accurate information, and connect to the online world. The department delivers on its mission by offering traditional library services including reference assistance and materials for entertainment and study, as well as high speed internet access, downloadable e-books and e-audiobooks, databases, the ability to receive and send information online (such as tax forms, job applications, and photos), and staff to assist customers in using technology. Community members enjoy library space to sit quietly and read or study.

## 2021-23 Accomplishments & Highlights

- In 2022, nearly 1,000 attendees at just under 100 programs.
- Over 46,000 items were physically checked out in the prior year.

## Goals

- Continue to regrow programs and attendance in a post-COVID-19 environment.
- Analyze collections for diversity, equity, and inclusion.
- Make progress towards the goal of every child in the Oregon Trail School District obtaining a library card.

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	-	-	-	2.65

# Hoodland Library

## Budget Summary & Detail

	BN 17-19	BN 19-21	BN 21-23	BN 23-25	BN 23-25
	Actual	Actual	Budget	Proposed	Approved
Beginning Balance	-	-	-	55,333	55,333
Intergovernmental	-	-	-	652,000	652,000
Fines, Fees, & Assessment	-	-	-	3,500	3,500
Grants	-	-	-	1,300	1,300
Miscellaneous Revenue	-	-	-	2,500	2,500
<b>Total Resources</b>	-	-	-	<b>714,633</b>	<b>714,633</b>
Personnel Services	-	-	-	493,500	493,500
Materials & Services	-	-	-	134,200	134,200
Capital Outlay	-	-	-	8,000	8,000
Transfers	-	-	-	68,114	68,114
Contingency	-	-	-	10,819	10,819
<b>Total Requirements</b>	-	-	-	<b>714,633</b>	<b>714,633</b>

*Hoodland Public Library consolidated with Sandy Public Library prior to BN 23-25*

### BN 23-25 Budget Notes

- Intergovernmental accounts for revenue from the Clackamas County Library District for the Hoodland service area.

## Hoodland Library

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
110-041-401100	Beginning Balance	-	-	-	55,333	55,333
110-041-441210	State Grants	-	-	-	1,300	1,300
110-041-442400	District Funding	-	-	-	652,000	652,000
110-041-463100	Fines	-	-	-	2,500	2,500
110-041-477100	Miscellaneous	-	-	-	2,500	2,500
110-041-477110	Lost/Paid Fees	-	-	-	1,000	1,000
<b>Total Resources</b>		-	-	-	<b>714,633</b>	<b>714,633</b>
110-041-511100	Salaries	-	-	-	321,000	321,000
110-041-511200	Overtime	-	-	-	-	-
110-041-521100	Insurance Benefits	-	-	-	43,000	43,000
110-041-521200	FICA Taxes	-	-	-	25,000	25,000
110-041-521300	PERS	-	-	-	99,000	99,000
110-041-521500	Workers' Benefit Fund	-	-	-	300	300
110-041-521600	Unemployment Insurance	-	-	-	1,400	1,400
110-041-521700	Paid Leave Oregon Tax	-	-	-	1,400	1,400
110-041-521800	Workers' Comp Insurance	-	-	-	400	400
110-041-521900	Transit Tax	-	-	-	2,000	2,000
110-041-601100	Supplies	-	-	-	3,200	3,200
110-041-601200	Postage	-	-	-	100	100
110-041-601401	Branding & Marketing	-	-	-	300	300
110-041-601700	Memberships	-	-	-	100	100
110-041-602200	Conferences	-	-	-	500	500
110-041-604100	Repairs & Maintenance	-	-	-	2,000	2,000
110-041-605100	Contractual Services	-	-	-	21,000	21,000
110-041-606100	Building Rent	-	-	-	48,500	48,500
110-041-607100	Utilities	-	-	-	7,000	7,000
110-041-608100	Professional Services	-	-	-	1,500	1,500
110-041-609100	Insurance	-	-	-	4,000	4,000
110-041-629101	Library Books	-	-	-	15,000	15,000
110-041-629102	Library Magazines	-	-	-	2,500	2,500
110-041-629103	Videos/DVDs	-	-	-	10,000	10,000
110-041-629104	Acquisition Database	-	-	-	4,500	4,500
110-041-629105	Video Games	-	-	-	1,000	1,000
110-041-629106	CD Music	-	-	-	3,000	3,000
110-041-629107	Audio Books	-	-	-	1,500	1,500
110-041-629108	Reference Database	-	-	-	6,000	6,000
110-041-629109	Digital	-	-	-	1,500	1,500
110-041-629200	Programs	-	-	-	1,000	1,000
110-041-740000	Furniture & Office Equipment	-	-	-	500	500
110-041-740100	Computer Equipment	-	-	-	7,500	7,500
110-041-911110	Indirect Support Cost	-	-	-	68,114	68,114
110-041-951000	Contingency	-	-	-	10,819	10,819
<b>Total Requirements</b>		-	-	-	<b>714,633</b>	<b>714,633</b>

# Street Fund

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## Fund Overview

The Street Fund accounts for all things related to streets and transportation within the city limits. The fund is split into two departments: operations and capital improvements.

### Operations

The Street Fund repairs and maintains more than 44.7 centerline miles of streets within the city limits. Street operating costs include power costs for street lighting and traffic signals (although ODOT is responsible for managing and maintain traffic signals). Major maintenance activities in Street Operations include traffic line painting (by contract) and parking lot stall striping, traffic control sign repair and installation, weed control in rights-of-way, snow and ice control, pothole patching, and street sweeping (by contract). In addition, Street Operations manages the City's traffic calming program, provides transportation-related comments on land use applications, and reviews street improvement plans for new development. Funding comes primarily from federal, state, and local fuel taxes.

The City uses Pavement Management System software to prioritize street maintenance projects based on a condition survey performed every five years. Using Local Option Fuel Tax revenue, the City strives to complete approximately \$250,000 to \$300,000 worth of street maintenance (asphalt overlays and surface treatments) projects annually. The annual amount of pavement maintenance work, (in miles or square feet for example) is difficult to quantify because some years may involve more costly maintenance over a smaller number of street sections, while other years may include relatively inexpensive treatments covering many streets. The goal of the program is to keep the Pavement Condition Index (PCI) at 80 or better.

### Capital Improvements

New streets, street widening, intersection improvements, and other street capital projects are funded through system development charges (SDCs) from new development, cash contributions from developers, state and federal fuel taxes, loans, and grants. The Transportation System Plan (TSP), adopted in the 2011-13 biennium, identifies the long-term project needs for motor vehicles, bicycles, and pedestrians. An update to the current TSP is being managed by the Planning Department and will be completed in late 2023.

## 2021-23 Accomplishments & Accomplishments

- Completed construction of Ten Eyck / Vista Loop pedestrian improvement project.
- Completed design, right-of-way acquisition, permitting, and land use review of 362<sup>nd</sup> / Bell Street Extension project. Project started construction in Summer 2022 and is slated for complete in August 2023.
- Supported the TSP project and completed two traffic calming studies.

## Goals

- Complete 9,345 feet of street surface treatment, rehabilitation, and overlays in summer 2023.

# Street Fund

## Performance Measures

	2017	2018	2019	2020	2021	2022
Square Feet of Streets Resurfaced	-	-	-	1,039,752	367,400	-
Miles of Streets	37	37	37	37	43	43
Pavement Condition Index	n/a	n/a	n/a	80	80	78
Local Gas Tax Revenue Collected	338,322	309,401	316,235	268,539	250,009	318,302
Streetlights Maintained	-	-	-	-	1,020	1,100

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	2.61	2.51	2.79	2.92

## Budget Summary & Detail

	BN17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>					
Beginning Balance	709,334	1,428,568	1,723,795	2,327,412	2,327,412
Fines, Fees, & Assessments	2,148,812	2,665,546	2,370,000	2,405,000	2,405,000
Interest	164,122	140,112	75,000	50,000	50,000
Loan Proceeds	11,653	34,267	36,000	-	-
Miscellaneous	55,825	179,710	10,500	5,000	5,000
<b>Operations Total</b>	<b>3,089,747</b>	<b>4,448,203</b>	<b>4,215,295</b>	<b>4,787,412</b>	<b>4,787,412</b>
Beginning Balance	2,458,567	3,587,337	7,665,073	-	-
Fines, Fees, & Assessments	1,250,920	1,736,975	1,000,000	1,819,000	1,819,000
Interest	977	174	200	-	-
Transfers	-	-	-	600,000	600,000
Loan Proceeds	-	6,643,898	-	-	-
<b>Capital Total</b>	<b>3,710,463</b>	<b>11,968,384</b>	<b>8,665,273</b>	<b>2,419,000</b>	<b>2,419,000</b>
<b>Total Resources</b>	<b>6,800,211</b>	<b>16,416,587</b>	<b>12,880,568</b>	<b>7,206,412</b>	<b>7,206,412</b>
<b>REQUIREMENTS</b>					
Personnel Services	496,231	528,062	608,000	773,500	773,500
Materials & Services	992,547	1,630,103	1,334,550	1,959,300	1,959,300
Capital Outlay	61,510	179,968	271,000	167,000	167,000
Debt Service	4,662	7,473	31,580	13,400	13,400
Transfers	106,230	117,357	118,723	179,299	179,299
Contingency	-	-	932,688	297,000	297,000
<b>Operations Total</b>	<b>1,661,179</b>	<b>2,462,963</b>	<b>3,296,541</b>	<b>3,389,499</b>	<b>3,389,499</b>
Capital Outlay	1,856	871,694	8,050,000	2,505,000	2,505,000
Debt Service	121,271	162,018	884,027	813,834	813,834
Contingency	-	-	650,000	498,079	498,079
<b>Capital Total</b>	<b>123,127</b>	<b>1,033,712</b>	<b>9,584,027</b>	<b>3,816,913</b>	<b>3,816,913</b>
<b>Total Requirements</b>	<b>1,784,306</b>	<b>3,496,675</b>	<b>12,880,568</b>	<b>7,206,412</b>	<b>7,206,412</b>

### BN 23-25 Budget Notes

- Fines, Fees, & Assessments (Operations) includes both state and local gas tax revenue.
- Capital Outlay includes the final costs associated with the 362<sup>nd</sup> / Bell Street extension, as well as \$850,000 towards the Gunderson Rd / Hwy 211 roundabout/intersection, and \$150,000 for intersection evaluation and improvements at Dubarko Rd / Hwy 211.

## Street Fund

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>						
240-054-401000	Beginning Balance	709,334	1,428,568	1,723,795	2,327,412	2,327,412
240-054-441150	State Shared - Gas Tax	1,496,278	1,604,882	1,750,000	1,800,000	1,800,000
240-054-441190	City Gas Tax	625,637	518,548	600,000	600,000	600,000
240-054-442500	Other Agencies	-	500,000	-	-	-
240-054-457100	Engineering Fees	26,847	31,458	20,000	5,000	5,000
240-054-471100	Interest	164,122	140,112	75,000	50,000	50,000
240-054-471104	Res. Sidewalk Repair	50	10,657	-	-	-
240-054-478000	Miscellaneous Revenue	55,558	178,710	10,000	5,000	5,000
240-054-479030	Surplus Property	267	1,000	500	-	-
240-054-495400	Loan Proceeds	11,653	34,267	36,000	-	-
<b>Operations Total</b>		<b>3,089,747</b>	<b>4,448,203</b>	<b>4,215,295</b>	<b>4,787,412</b>	<b>4,787,412</b>
240-154-401000	Beginning Balance	2,458,567	3,587,337	7,665,073	-	-
240-154-423000	AFRD Reimbursement	1,881	79,002	-	4,000	4,000
240-154-433540	Streets SDC	1,199,207	909,468	600,000	1,390,000	1,390,000
240-154-441140	VRF Funds	-	254,073	400,000	425,000	425,000
240-154-441434	ODOT STP Funds	28,108	-	-	-	-
240-154-459001	Payment In Lieu Street Improvement Fees	21,724	494,432	-	-	-
240-154-471100	Interest	977	174	200	-	-
240-154-491000	Transfer from General Fund	-	-	-	600,000	600,000
240-154-495400	Loan Proceeds	-	6,643,898	-	-	-
<b>Capital Total</b>		<b>3,710,463</b>	<b>11,968,384</b>	<b>8,665,273</b>	<b>2,419,000</b>	<b>2,419,000</b>
<b>Total Resources</b>		<b>6,800,211</b>	<b>16,416,587</b>	<b>12,880,568</b>	<b>7,206,412</b>	<b>7,206,412</b>

Requirements are listed on the following page.



# Street Fund

REQUIREMENTS						
240-054-511100	Salaries	299,160	303,391	380,000	456,000	456,000
240-054-511200	Overtime	14,947	11,029	-	16,000	16,000
240-054-521100	Insurance Benefits	53,752	50,296	74,000	104,000	104,000
240-054-521200	FICA Taxes	24,129	24,048	29,000	37,000	37,000
240-054-521300	PERS	66,595	83,810	101,000	138,000	138,000
240-054-521360	Other Benefits	6,269	4,327	-	-	-
240-054-521500	Workers' Benefit Fund	229	184	500	500	500
240-054-521600	Unemployment Insurance	316	316	500	2,000	2,000
240-054-521700	Paid Leave Oregon Tax	-	-	-	2,000	2,000
240-054-521800	Workers' Comp Insurance	28,941	48,774	21,000	15,000	15,000
240-054-521900	Transit Tax	1,893	1,887	2,000	3,000	3,000
240-054-601100	Supplies	39,075	65,170	40,000	70,000	70,000
240-054-601200	Postage	136	113	100	100	100
240-054-601300	Printing	108	-	100	100	100
240-054-601400	Copier Charges	210	15	100	100	100
240-054-601401	Branding & Marketing	253	-	-	-	-
240-054-601500	Public Notices	-	194	50	-	-
240-054-601600	Organizational Fees	-	-	100	200	200
240-054-601700	Memberships	15	-	100	600	600
240-054-601800	Books and Subscriptions	56	55	100	600	600
240-054-601900	Uniforms	925	1,954	2,000	2,300	2,300
240-054-602100	Employee Recruitment	282	76	100	5,000	5,000
240-054-602200	Conferences	-	-	1,000	10,000	10,000
240-054-602300	Training & Professional Advancement	1,998	7	1,000	5,000	5,000
240-054-602500	Meetings & Meals	207	131	250	700	700
240-054-603100	Mileage Reimbursement	6	2	50	100	100
240-054-603200	Vehicle - Fuel	7,249	7,995	8,500	15,000	15,000
240-054-603400	Vehicle Reg/Licenses	-	-	-	500	500
240-054-603500	Vehicle Repair & Maintenance	10,250	17,303	15,000	30,000	30,000
240-054-604100	Repairs & Maintenance	63,383	59,795	50,000	75,000	75,000
240-054-604500	Street Maintenance Program	254,243	790,413	600,000	600,000	600,000
240-054-605100	Contractual Services	275,750	342,730	350,000	805,000	805,000
240-054-606100	Equipment Rental	17,555	19,258	10,000	20,000	20,000
240-054-607100	Utilities	278,882	230,227	180,000	190,000	190,000
240-054-608100	Professional Services	6,358	5,179	30,000	20,000	20,000
240-054-608200	Professional Services - Engineering	24,822	79,003	30,000	90,000	90,000
240-054-609100	Insurance	8,988	9,572	15,000	18,000	18,000
240-054-610200	Fees	692	914	1,000	1,000	1,000
240-054-628200	Credit Card Merchant Fee	989	-	-	-	-
240-054-650300	Regulatory Fees	113	-	-	-	-
240-054-734000	Improvements	-	56,400	35,000	-	-
240-054-734800	Sidewalk/Bike Path Improvements	30,154	2,170	50,000	10,000	10,000
240-054-740000	Furniture & Office Equipment	-	113	-	5,000	5,000
240-054-740100	Computer Equipment	796	928	-	12,000	12,000
240-054-760000	Machinery & Equipment	27,560	51,011	36,000	70,000	70,000
240-054-770000	Major Repairs & Maintenance	3,000	69,347	150,000	70,000	70,000
240-054-812100	Loan Principal	4,662	7,473	31,580	13,400	13,400
240-054-910110	Transfer to General Fund	91,536	100,219	101,585	152,199	152,199
240-054-910370	Transfer to Facilities Maint. Fund	3,239	3,200	3,200	3,200	3,200
240-054-910670	Transfer to Op Ctr ISF	11,455	13,938	13,938	23,900	23,900
240-054-950000	Contingency	-	-	932,688	297,000	297,000
<b>Operations Total</b>		<b>1,661,179</b>	<b>2,462,963</b>	<b>3,296,541</b>	<b>3,389,499</b>	<b>3,389,499</b>
240-154-734000	Improvements	-	791,886	8,050,000	850,000	850,000
240-154-734010	362nd Ave/Bell St Extention	-	-	-	1,505,000	1,505,000
240-154-734507	LED Streetlight Conversion	-	-	-	-	-
240-154-734508	Dubarko & Hwy 211 Improvements	-	-	-	150,000	150,000
240-154-785117	AFRD Reimbursement	1,856	79,808	-	-	-
240-154-812903	Bond Principal	114,424	59,485	420,000	465,000	465,000
240-154-832902	Bond Interest	6,846	1,171	464,027	347,634	347,634
250-154-870000	Paying Agent Fees	-	101,361	-	1,200	1,200
240-154-950000	Contingency	-	-	650,000	498,079	498,079
<b>Capital Total</b>		<b>123,127</b>	<b>1,033,712</b>	<b>9,584,027</b>	<b>3,816,913</b>	<b>3,816,913</b>
<b>Total Requirements</b>		<b>1,784,306</b>	<b>3,496,675</b>	<b>12,880,568</b>	<b>7,206,412</b>	<b>7,206,412</b>

# Transit Fund

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## Fund Overview

The Transit Fund accounts for all things related to Sandy Area Metro (SAM) transit services. This includes 3 fixed route services, in-town dial-a-ride service, out-of-town medical rides service, and a future intercity service to Clackamas Town Center.



## Operations

The Transit Fund provides safe, reliable, and convenient transportation options for Sandy residents through the deployment of several types of service. For improved connectivity, SAM provides a critical link between Sandy and Gresham, as well as Sandy and Estacada with fixed route service. Each SAM route provides a quick and easy transfer with timed connections to TriMet in Gresham and Estacada and timed connections to Mt. Hood Express at the Sandy Transit Center. For in-town travel, SAM offers a fixed route on Highway 26 and a deviated route known as the Shopper Shuttle. The Transit Department also operates a dial-a-ride service, known as *SAMrides*. The dial-a-ride is an origin-to-destination service that is available everywhere in Sandy, as well as for trips that originate and terminate within a 3-mile radius of the center of town. *SAMrides* also provides complementary ADA service for qualified individuals who cannot access the fixed route. Additionally, Transit operates a non-emergency medical ride program for Sandy's frail and/or elderly community members, providing transportation for Sandy residents to out of town medical services that are not available within city limits. In the interest of collaboration and efficiency, this program also provides rides for frail and elderly community members who qualify through the Sandy Senior Center's transportation programs. SAM also has an administrative role in Mt. Hood Express and Villages Shuttle transportation services. These services connect to SAM at the Sandy Transit Center, providing transportation to the mountain communities as far as Timberline Lodge.

## Capital Improvements

The Transit Department will lead a planning project for future improvements to the Sandy Operations Center, in collaboration with other City departments. These improvements include an architectural and engineering plan for a second administrative building and a maintenance bay as outlined in the Operations Center Master Plan. Transit will also upgrade the Sandy Operations Center to accommodate electric vehicles. This includes the ability to charge and maintain electric vehicles.

## 2021-23 Accomplishments & Highlights

- Procured new software to improve capability and customer experience of dial-a-ride services.
- Procured new transit intelligence services for the entire fleet, improving capabilities of the dial-a-ride service in partnership with Mt. Hood Express and other transit providers within Clackamas County. All SAM, MHX and other Clackamas County providers were included in the transition, making usage of "find your bus" apps the same for every passenger in Clackamas County.
- Developed a Capacity Plan for expansion and improvements of the Operations Center and a modernized fleet. Identified and secured funding for planning.
- Procured three new vans to replace aging vehicles in the current fleet.
- Collaborated with Clackamas County providers to identify an e-fares and/or fare sharing implementation plan and the development of an integrated webpage for planning cross-county travel. The planning stage is complete; the webpage is currently under construction and funding is secured for the implementation of mobile payments.

## Transit Fund

- Identified and implemented route improvements as identified in the Transit Master Plan through the securement of funds for the new route to Clackamas Town Center and Saturday Shopper Shuttle (HB 2017 24-25 STIF Plan).
- Secured funding for 3 new all electric 35' Heavy Duty Transit Vehicles and necessary charging equipment and workforce development funds through a very competitive Federal Low or No Emission Grant Program.

### Goals

- Increase ridership and community awareness of the Shopper Shuttle through marketing and the addition of Saturday service.
- Plan and implement a safe and efficient route to Clackamas Town Center.
- In collaboration with other City departments, develop an expansion plan for the Sandy Operations Center including architectural and engineering design for a shovel ready expansion project that can accommodate current and future space needs.
- Maintain and modernize facility infrastructure through maintenance and upgrades to the Sandy Operations Center. Upgrades will include structural repair and paint for exterior buildings and upgraded electrical capacity to accommodate electric vehicles.
- Modernize the Sandy fleet through procurement of three 35' electric heavy duty transit vehicles.
- Improve the Sandy Estacada route through expansion and interlined service.
- Implement mobile ticketing on Sandy's fleet in partnership with County providers for improved fare recovery and customer service across the County.
- Identify cost recovery and contract management strategies for the Department and conduct a Request for Proposals process for operations.

### Performance Measures

	2017	2018	2019	2020	2021	2022
Ridership	121,227	129,776	123,245	111,714	76,642	77,603
Percent Elderly and Disabled	17	20	23	22	21	19
Routes/Programs	5	5	5	5	5	5
Special Events	3	4	2	5	5	5
Revenue Service Hours	15,919	16,238	16,292	16,990	13,808	16,639
Revenue Service Miles	341,335	347,042	356,411	342,866	337,675	317,429

### Staffing

	17-19	19-21	21-23	23-25
Total FTE	1.80	3.00	2.80	2.80

# Transit Fund

## Budget Summary & Detail

	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>					
Beginning Balance	2,064,458	1,890,443	1,504,333	2,058,598	2,058,598
Fines, Fees, & Assessments	1,709,308	2,364,644	1,517,564	4,101,971	4,101,971
Interest	75,499	96,025	41,000	19,000	19,000
Grants	1,583,594	1,804,175	1,852,345	1,810,392	1,810,392
Miscellaneous	62,988	195,566	232,355	172,924	172,924
<b>Operations Total</b>	<b>5,495,847</b>	<b>6,350,853</b>	<b>5,147,597</b>	<b>8,162,885</b>	<b>8,162,885</b>
Beginning Balance	(183,030)	(44,787)	-	-	-
Grants	228,988	1,583,202	581,000	2,956,728	2,956,728
Miscellaneous	-	4,203	-	-	-
<b>Capital Total</b>	<b>45,958</b>	<b>1,542,618</b>	<b>581,000</b>	<b>2,956,728</b>	<b>2,956,728</b>
<b>Total Resources</b>	<b>5,541,805</b>	<b>7,893,471</b>	<b>5,728,597</b>	<b>11,119,613</b>	<b>11,119,613</b>
<b>REQUIREMENTS</b>					
Personnel Services	488,616	1,060,181	668,500	787,800	787,800
Materials & Services	2,089,600	2,556,848	3,463,226	5,504,399	5,504,399
Capital Outlay	2,482	31,975	20,000	-	-
Debt Service	856,272	-	-	-	-
Transfers	168,434	192,933	215,923	326,951	326,951
Contingency	-	-	545,948	546,977	546,977
<b>Operations Total</b>	<b>3,605,404</b>	<b>3,841,936</b>	<b>4,913,597</b>	<b>7,166,127</b>	<b>7,166,127</b>
Capital Outlay	90,745	2,468,069	815,000	3,953,486	3,953,486
<b>Capital Total</b>	<b>90,745</b>	<b>2,468,069</b>	<b>815,000</b>	<b>3,953,486</b>	<b>3,953,486</b>
<b>Total Requirements</b>	<b>3,696,149</b>	<b>6,310,005</b>	<b>5,728,597</b>	<b>11,119,613</b>	<b>11,119,613</b>

### BN 23-25 Budget Notes

- Fines, Fees, & Assessments includes the 0.06% tax for all business operating within city limits.
- Grants includes federal and state grant proceeds to assist in the operations and capital expenses associated with providing transit services.
- Capital Outlay includes electrification of the Sandy Operations Center, three electric vehicles, one gas powered vehicle, and architectural and engineering services for the expansion of the Operations Center.

# Transit Fund

Account Number	Account Name	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>						
270-070-401000	Beginning Balance	2,064,458	1,890,443	1,504,333	2,058,598	2,058,598
270-070-411300	Employer Transit Tax	1,346,479	1,521,172	1,000,000	1,796,586	1,796,586
270-070-440300	Federal Grants	1,333,657	1,526,680	1,587,187	1,338,456	1,338,456
270-070-441450	State Grants	249,937	277,495	265,158	471,936	471,936
270-070-441470	STIF Revenue	57,709	205,576	279,444	1,731,037	1,731,037
270-070-442500	Other Agencies	115,600	482,227	122,640	247,778	247,778
270-070-459100	Farebox - SAM	135,684	102,777	48,048	89,000	89,000
270-070-459101	Fare Media - SAM	36,863	19,710	6,552	20,000	20,000
270-070-459110	Revenue Other Districts	-	-	10,000	10,000	10,000
270-070-459200	Farebox - MHX	-	-	-	125,000	125,000
270-070-459201	Fare Media - MHX	-	-	-	30,000	30,000
270-070-471100	Interest	75,499	70,896	40,000	17,000	17,000
270-070-471101	Interest - STIF	-	25,129	1,000	2,000	2,000
270-070-474200	Facility & Vehicle Fees	16,973	33,181	50,880	52,570	52,570
270-070-478040	Miscellaneous Revenue	(2,667)	13,378	-	-	-
270-070-478200	Reimbursements	10,224	21,931	42,500	-	-
270-070-495355	Interfund Loan Payments	55,431	160,257	189,855	172,924	172,924
<b>Operations Total</b>		<b>5,495,847</b>	<b>6,350,853</b>	<b>5,147,597</b>	<b>8,162,885</b>	<b>8,162,885</b>
270-170-401000	Beginning Balance	(183,030)	(44,787)	-	-	-
270-170-440300	Federal Grants	228,988	1,583,202	521,000	2,956,728	2,956,728
270-170-440400	State Revenue	-	-	60,000	-	-
270-170-479000	Surplus Property	-	4,203	-	-	-
<b>Capital Total</b>		<b>45,958</b>	<b>1,542,618</b>	<b>581,000</b>	<b>2,956,728</b>	<b>2,956,728</b>
<b>Total Resources</b>		<b>5,541,805</b>	<b>7,893,471</b>	<b>5,728,597</b>	<b>11,119,613</b>	<b>11,119,613</b>

Requirements are listed on the following page.

# Transit Fund

REQUIREMENTS						
270-070-511100	Salaries	326,730	793,731	447,000	524,000	524,000
270-070-511200	Overtime	-	31,121	-	-	-
270-070-521100	Insurance Benefits	69,608	55,663	65,000	70,000	70,000
270-070-521200	FICA Taxes	25,259	63,111	34,000	40,000	40,000
270-070-521300	PERS	60,909	107,998	118,000	145,000	145,000
270-070-521360	Other Benefits	3,168	1,804	-	-	-
270-070-521500	Workers' Benefit Fund	275	691	500	400	400
270-070-521600	Unemployment Insurance	330	825	500	2,200	2,200
270-070-521700	Paid Leave Oregon Tax	-	-	-	2,200	2,200
270-070-521800	Workers' Comp Insurance	356	287	500	800	800
270-070-521900	Transit Tax	1,981	4,950	3,000	3,200	3,200
270-070-601100	Supplies	2,671	10,075	5,000	9,500	9,500
270-070-601200	Postage	3,967	5,504	4,000	4,000	4,000
270-070-601300	Printing	6,637	4,690	10,000	10,000	10,000
270-070-601400	Copier Charges	209	146	500	-	-
270-070-601401	Branding & Marketing	10,191	11,810	15,000	30,000	30,000
270-070-601500	Public Notices	-	229	500	500	500
270-070-601700	Memberships	3,884	3,348	4,000	4,000	4,000
270-070-602100	Employee Recruitment	69	3,308	1,000	1,000	1,000
270-070-602200	Conferences	7,964	1,735	10,000	15,000	15,000
270-070-602300	Training & Professional Advancement	4,699	-	5,000	20,000	20,000
270-070-602500	Meetings & Meals	2,516	1,177	3,000	3,500	3,500
270-070-603100	Mileage Reimbursement	2,576	725	3,000	2,000	2,000
270-070-603200	Vehicle - Fuel	245,041	205,611	350,000	400,000	400,000
270-070-603400	Vehicle Reg/Licenses	195	350	600	1,500	1,500
270-070-603500	Vehicle Repair & Maintenance	209,991	322,168	350,000	375,000	375,000
270-070-603510	Vehicle Repair & Maintenance - MHX	-	104,896	42,500	140,000	140,000
270-070-604100	Vehicle Accessory Equipment	2,663	11,162	50,000	-	-
270-070-604200	Bus Shelter Maintenance	16,794	11,584	16,000	30,000	30,000
270-070-604300	Building Repairs & Maintenance	-	-	-	-	-
270-070-605100	Contractual Services	1,002,808	1,495,687	1,621,555	3,866,854	3,866,854
270-070-605110	Contractual Services - MHX	-	123,125	-	-	-
270-070-605300	Administrative Contracts	14,198	5,162	10,000	50,000	50,000
270-070-607100	Utilities	4,589	3,952	6,000	20,000	20,000
270-070-608200	Bus Shelters	6,596	648	8,000	12,000	12,000
270-070-609100	Insurance	111,788	99,302	36,000	38,000	38,000
270-070-610200	Fees	645	440	1,000	1,000	1,000
270-070-636100	Program - E&D	428,950	130,012	910,571	315,545	315,545
270-070-637100	Fare Reimbursement - MHX	-	-	-	155,000	155,000
270-070-639100	Cash Over/Short	(39)	-	-	-	-
270-070-740000	Furniture & Office Equipment	-	602	-	-	-
270-070-740100	Computer Equipment	2,482	31,270	20,000	-	-
270-070-750000	Transportation Equipment	-	102	-	-	-
270-070-812200	Interfund Loan Principal	856,272	-	-	-	-
270-070-910030	Transfer to GF Police	-	-	-	-	-
270-070-910110	Transfers to General Fund	113,850	127,608	150,598	189,751	189,751
270-070-910370	Transfer to Facilities Maint. Fund	12,043	12,200	12,200	12,200	12,200
270-070-910560	Transfer to Telecom Fund	-	-	-	-	-
270-070-910670	Transfer to Op Ctr ISF	42,541	53,125	53,125	125,000	125,000
270-070-950000	Contingency	-	-	545,948	546,977	546,977
<b>Operations Total</b>		<b>3,605,404</b>	<b>3,841,936</b>	<b>4,913,597</b>	<b>7,166,127</b>	<b>7,166,127</b>
270-170-723400	Transit Center	-	-	-	460,000	460,000
270-170-734600	Bus Barn	-	1,085,438	-	-	-
270-170-735000	Capacity Improvements	-	-	15,000	248,486	248,486
270-170-750000	Transportation Equipment	90,745	1,375,288	800,000	3,245,000	3,245,000
270-170-750100	Bus Shelters	-	7,343	-	-	-
<b>Capital Total</b>		<b>90,745</b>	<b>2,468,069</b>	<b>815,000</b>	<b>3,953,486</b>	<b>3,953,486</b>
<b>Total Requirements</b>		<b>3,696,149</b>	<b>6,310,005</b>	<b>5,728,597</b>	<b>11,119,613</b>	<b>11,119,613</b>

# Aquatic/Recreation Center Fund

## Fund Overview

The Aquatic/Recreation Center located on the Sandy Community Campus, is the site of the old Cedar Ridge Middle School, previously owned by the Oregon Trail School District. The City purchased the property from the District in March 2017 for \$3 million. Urban renewal funds were used to purchase the property. The Olin Bignal Aquatic Center began renovations in March 2018, and the pool opened under City management on July 7, 2018. The pool closed on May 31, 2019 pending further planning for the Community Campus. This Fund also accounts for the utility and building maintenance expenses related to the other buildings on the property.

## 2021-23 Accomplishments & Highlights

- The Pool Exploratory Task Force was formed and completed an evaluation of the aquatic center and provided recommendations on the future community aquatic needs.
- Recognizing the deterioration of the systems and structural integrity issues, and the substantial costs to fix and upgrade the pool, the pool was drained to reduce the costs associated with heating and maintaining the body of water.

## Goals

- Develop and execute a path forward with the derelict buildings on the site.

## Staffing

	17-19	19-21	21-23	23-25
<b>Total FTE</b>	-	0.30	0.25	-

## Budget Summary & Detail

	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	-	114,011	93,624	157,000	157,000
Fines, Fees, & Assessments	110,752	75	-	-	-
Interest	455	2,807	2,000	1,000	1,000
Transfers	350,000	-	-	-	-
General Revenue	241,179	160,000	241,000	-	-
<b>Total Resources</b>	<b>702,385</b>	<b>276,893</b>	<b>336,624</b>	<b>158,000</b>	<b>158,000</b>
Personnel Services	353,362	37,341	58,700	-	-
Materials & Services	229,069	127,039	182,600	127,000	91,000
Capital Outlay	5,909	-	-	-	-
Transfers	-	-	12,951	12,599	48,599
Contingency	-	-	82,373	18,401	18,401
<b>Total Requirements</b>	<b>588,340</b>	<b>164,381</b>	<b>336,624</b>	<b>158,000</b>	<b>158,000</b>

## BN 23-25 Budget Notes

- 58% of the overall budget is utilities and insurance costs.
- The Budget Committee elected to eliminate insurance coverage on two of the vacation buildings at the site, reducing insurance costs by \$36,000. These funds were then moved back into the General Fund via Transfers Out.

## Aquatic/Recreation Center Fund

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
280-000-401000	Beginning Balance	-	114,011	93,624	157,000	157,000
280-000-451000	Building Rental	7,200	40	-	-	-
280-000-451100	Memberships	5,270	(2,315)	-	-	-
280-000-451200	Aquatic Facility Rentals	25,332	2,350	-	-	-
280-000-451300	Merchandise	817	-	-	-	-
280-000-451400	Swimming Lessons	50,598	-	-	-	-
280-000-451500	Water Exercise	5,459	-	-	-	-
280-000-451600	Open Recreation	16,076	-	-	-	-
280-000-471100	Interest	455	2,807	2,000	1,000	1,000
280-000-478000	Miscellaneous Revenue	-	47	-	-	-
280-000-491000	Transfer from Non-Departmental	350,000	-	-	-	-
280-000-491110	General Revenue	241,179	160,000	241,000	-	-
<b>Total Resources</b>		<b>702,385</b>	<b>276,940</b>	<b>336,624</b>	<b>158,000</b>	<b>158,000</b>
280-000-511100	Salaries	123,202	22,520	33,000	-	-
280-000-511101	Salaries - Guest Services	27,130	-	-	-	-
280-000-511102	Salaries - Lifeguards	83,279	-	-	-	-
280-000-511103	Salaries - Swim Instructors	35,038	-	-	-	-
280-000-511104	Salaries - Water Exercise Instructors	5,627	-	-	-	-
280-000-511200	Overtime	314	-	-	-	-
280-000-521100	Insurance Benefits	13,211	6,094	12,000	-	-
280-000-521200	FICA Taxes	20,991	1,723	3,000	-	-
280-000-521300	PERS	37,792	4,861	8,000	-	-
280-000-521360	Other Benefits	4,314	23	-	-	-
280-000-521500	Workers' Benefit Fund	445	16	100	-	-
280-000-521600	Unemployment Insurance	288	22	100	-	-
280-000-521800	Workers' Comp Insurance	-	1,949	2,000	-	-
280-000-521900	Transit Tax	1,730	135	500	-	-
280-000-601100	Supplies	55,705	169	1,000	1,000	1,000
280-000-601101	Supplies - Pool Chemicals	9,661	2,467	4,000	-	-
280-000-601102	Supplies - Safety	1,961	-	-	-	-
280-000-601103	Supplies - Swim Lessons	530	-	-	-	-
280-000-601104	Supplies - Water Exercise	130	-	-	-	-
280-000-601200	Postage	49	-	-	-	-
280-000-601400	Copier Charges	116	-	-	-	-
280-000-601401	Branding & Marketing	196	-	-	-	-
280-000-601402	Merchandise	815	-	-	-	-
280-000-601700	Membership	134	-	-	-	-
280-000-601900	Uniforms	646	-	-	-	-
280-000-602100	Employee Recruitment	69	-	-	-	-
280-000-602300	Training & Professional Advancement	428	299	500	-	-
280-000-602500	Meetings & Meals	730	-	-	-	-
280-000-603100	Mileage Reimbursement	105	3	100	-	-
280-000-604100	Repairs & Maintenance	24,074	1,447	10,000	-	-
280-000-605100	Contractual Services	16,286	-	-	-	-
280-000-606100	Equipment Rental	107	3,404	2,000	-	-
280-000-607100	Utilities	116,205	99,882	110,000	60,000	60,000
280-000-609100	Insurance	-	18,292	54,000	66,000	30,000
280-000-610200	Fees	1,123	1,075	1,000	-	-
280-000-639100	Cash Over/Short	34	-	-	-	-
280-000-740100	Computer Equipment	4,944	-	-	-	-
280-000-760000	Machinery & Equipment	965	-	-	-	-
280-000-910110	Transfer to General Fund	-	-	12,951	12,599	48,599
280-000-951000	Contingency	-	-	82,373	18,401	18,401
<b>Total Requirements</b>		<b>588,374</b>	<b>164,381</b>	<b>336,624</b>	<b>158,000</b>	<b>158,000</b>



# **Parks Capital Projects Fund**

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## **Fund Overview**

The Parks Capital Projects Fund accounts for all capital projects related to parks within the City. The fund receives money from developers via payments in lieu of land dedication or parks systems development charges (SDCs). The fund is split into three departments: land, operations, and SDCs. The volunteer Parks and Trails Advisory Board meets monthly to discuss current park issues and to provide input to Council and staff on plans for future park improvements.

### **Land**

Residential developers are required to either dedicate land for parks or pay a fee in lieu of land dedication. The City decides whether to require land dedication or fee payment based on the proximity of existing parks to the development site or the size or quality of land available on the development site. The land area requirement is based on a formula and national standards for park land area per capita. The fee amount is based on the value of residential land in Sandy. These components are reviewed periodically.

### **Operations**

This department was created in BN 17-19 to account for expenses incurred by staffing and supporting the Parks Advisory Board. During that biennium there was a small transfer to this department from the General Fund to cover the costs of an associate planner to assist with parks planning.

### **System Development Charges (SDC)**

SDCs are fees that are collected when new development occurs in the city and used to fund new or expansion of parks, which includes trail expansion and park facilities. In addition, the City actively seeks grant money to fund parks projects.

## **2021-23 Accomplishments & Highlights**

- Completed the update to the Parks and Trails Master Plan.
- Updated and implemented the Parks System Development Charge and Fee-in-Lieu methodology.
- Continued efforts for visioning of the Community Campus Park and developed a plan for development of a 10.5-acre park at the site to include a pump track, skate park, playground, parking lot, and walking path.

## **Goals**

- Continue to engage the Community Campus Visioning Subcommittee to further the conversation regarding the future of the front half of the Community Campus property.
- Complete the connector trail from the Community Campus Park down to Sandy River Park.
- Develop the community park at the Community Campus.
- Prioritize the planning and development of Deer Point Park if funding is available.
- Research and act of the purchase of parkland for future park facilities and/or natural area and open space preservation.

# Parks Capital Projects Fund

## Budget Summary & Detail

	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>					
Beginning Balance	151,396	789,431	1,133,431	1,221,957	1,221,957
Fines, Fees, & Assessments	670,846	295,293	300,000	400,000	400,000
Interest	18,393	27,041	30,000	25,000	25,000
<b>Land Total</b>	<b>840,636</b>	<b>1,111,765</b>	<b>1,463,431</b>	<b>1,646,957</b>	<b>1,646,957</b>
Beginning Balance	(9,996)	49,433	49,433	-	-
Fines, Fees, & Assessments	3,800	-	-	-	-
Interest	43,161	-	-	-	-
Transfers	42,268	-	-	-	-
General Revenue	5,570	-	-	-	-
<b>Operations Total</b>	<b>84,803</b>	<b>49,433</b>	<b>49,433</b>	<b>-</b>	<b>-</b>
Beginning Balance	263,478	1,015,364	1,347,175	1,757,681	1,757,681
Fines, Fees, & Assessments	751,927	539,952	600,000	1,800,000	1,800,000
Interest	-	35,271	30,000	25,000	25,000
<b>SDC Total</b>	<b>1,015,405</b>	<b>1,590,586</b>	<b>1,977,175</b>	<b>3,582,681</b>	<b>3,582,681</b>
<b>Total Resources</b>	<b>1,940,844</b>	<b>2,751,785</b>	<b>3,490,039</b>	<b>5,229,638</b>	<b>5,229,638</b>
<b>REQUIREMENTS</b>					
Capital Outlay	-	10,000	500,000	1,500,000	1,500,000
Contingency	-	-	963,431	146,957	146,957
<b>Land Total</b>	<b>-</b>	<b>10,000</b>	<b>1,463,431</b>	<b>1,646,957</b>	<b>1,646,957</b>
Personnel Services	34,531	-	-	-	-
Materials & Services	788	-	49,433	-	-
Capital Outlay	51	-	-	-	-
<b>Operations Total</b>	<b>35,370</b>	<b>-</b>	<b>49,433</b>	<b>-</b>	<b>-</b>
Materials & Services	41	147,130	100,000	-	-
Capital Outlay	-	59,747	1,300,000	3,500,000	3,500,000
Contingency	-	-	577,175	82,681	82,681
<b>SDC Total</b>	<b>41</b>	<b>206,877</b>	<b>1,977,175</b>	<b>3,582,681</b>	<b>3,582,681</b>
<b>Total Requirements</b>	<b>35,411</b>	<b>216,877</b>	<b>3,490,039</b>	<b>5,229,638</b>	<b>5,229,638</b>

### BN 23-25 Budget Notes

- Capital Outlay in the Land division is for the possible purchase of future athletic fields or natural areas and open space preservation per the City Council's goal.
- Capital Outlay in the SDC department is for the construction of various parks, including \$1.8 million for the Community Campus, \$1.5 million for Deer Point, and \$200,000 for Meinig Park and trail development.

## Parks Capital Projects Fund

Account Number	Account Name	BN17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>						
350-000-401000	Beginning Balance	151,396	789,431	1,133,431	1,221,957	1,221,957
350-000-433420	Park Payment In Lieu of Land	670,846	295,293	300,000	400,000	400,000
350-000-471100	Interest	18,393	27,041	30,000	25,000	25,000
<b>Land Total</b>		<b>840,636</b>	<b>1,111,765</b>	<b>1,463,431</b>	<b>1,646,957</b>	<b>1,646,957</b>
350-099-401000	Beginning Balance	(9,996)	49,433	49,433	-	-
350-099-471100	Interest	43,161	-	-	-	-
350-099-475010	Gazebo Rental Revenue	3,800	-	-	-	-
350-099-490139	Transfer from Non-Dept.	42,268	-	-	-	-
350-099-491110	General Revenue	5,570	-	-	-	-
<b>Operations Total</b>		<b>84,803</b>	<b>49,433</b>	<b>49,433</b>	<b>-</b>	<b>-</b>
350-135-401000	Beginning Balance	263,478	1,015,364	1,347,175	1,757,681	1,757,681
350-135-433510	Park SDCs	751,927	539,952	600,000	1,800,000	1,800,000
350-135-471100	Interest	-	35,271	30,000	25,000	25,000
<b>SDC Total</b>		<b>1,015,405</b>	<b>1,590,586</b>	<b>1,977,175</b>	<b>3,582,681</b>	<b>3,582,681</b>
<b>Total Resources</b>		<b>1,940,844</b>	<b>2,751,785</b>	<b>3,490,039</b>	<b>5,229,638</b>	<b>5,229,638</b>
<b>REQUIREMENTS</b>						
350-000-715008	Land	-	10,000	500,000	1,500,000	1,500,000
350-000-950000	Contingency	-	-	963,431	146,957	146,957
<b>Land Total</b>		<b>-</b>	<b>10,000</b>	<b>1,463,431</b>	<b>1,646,957</b>	<b>1,646,957</b>
350-099-511100	Salaries	25,744	-	-	-	-
350-099-511200	Overtime	502	-	-	-	-
350-099-521100	Insurance Benefits	2,492	-	-	-	-
350-099-521200	FICA Taxes	2,016	-	-	-	-
350-099-521300	PERS	3,136	-	-	-	-
350-099-521360	Other Benefits	431	-	-	-	-
350-099-521500	Workers' Benefit Fund	26	-	-	-	-
350-099-521600	Unemployment Insurance	26	-	-	-	-
350-099-521900	Transit Tax	158	-	-	-	-
350-099-601100	Supplies	715	-	-	-	-
350-099-602500	Meetings & Meals	34	-	-	-	-
350-099-608100	Professional Services	-	-	49,433	-	-
350-099-628200	Credit Card Merchant Fee	39	-	-	-	-
350-099-715900	Future Parks Projects	51	-	-	-	-
<b>Operation Total</b>		<b>35,370</b>	<b>-</b>	<b>49,433</b>	<b>-</b>	<b>-</b>
350-135-608100	Professional Services	41	147,130	100,000	-	-
350-135-715090	Bornstedt Park	-	59,747	-	-	-
350-135-715900	Future Parks Projects	-	-	1,300,000	3,500,000	3,500,000
350-135-950000	Contingency	-	-	577,175	82,681	82,681
<b>SDC Total</b>		<b>41</b>	<b>206,877</b>	<b>1,977,175</b>	<b>3,582,681</b>	<b>3,582,681</b>
<b>Total Requirements</b>		<b>35,411</b>	<b>216,877</b>	<b>3,490,039</b>	<b>5,229,638</b>	<b>5,229,638</b>

## Sewer Bond Reserve Fund

### Fund Overview

The Sewer Bond Reserve Fund is a debt service reserve fund. The fund was created to retire the debt from the existing wastewater treatment plant which was financed with a 40-year USDA Rural Development loan. The USDA debt was retired in August 2021.

### Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	1,288,434	1,632,437	1,825,957	-	-
Interest	59,589	53,780	50,000	-	-
Transfers	284,415	203,999	-	-	-
<b>Total Resources</b>	<b>1,632,438</b>	<b>1,890,217</b>	<b>1,875,957</b>	-	-
Transfers	-	-	1,875,957	-	-
Reserve for Future Expenditure	-	-	-	-	-
<b>Total Requirements</b>	-	-	<b>1,875,957</b>	-	-

*USDA loan retired in August 2021. This fund will no longer have any activity.*

### BN 23-25 Budget Notes

- As the debt has been retired, there is no activity for the upcoming biennium.

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
440-000-401000	Beginning Balance	1,288,434	1,632,437	1,825,957	-	-
440-000-471100	Interest	59,589	53,780	50,000	-	-
440-000-490440	Transfer From Sewer Fund	50,000	100,000	-	-	-
440-000-495355	Interfund Loan Payments	234,415	103,999	-	-	-
<b>Total Resources</b>		<b>1,632,438</b>	<b>1,890,217</b>	<b>1,875,957</b>	-	-
440-098-910570	Loan to Telecom Fund	-	-	-	-	-
440-098-910530	Transfer to Sewer Fund	-	-	1,875,957	-	-
440-098-980100	Reserve for Future Payment	-	-	-	-	-
<b>Total Requirements</b>		-	-	<b>1,875,957</b>	-	-

# Full Faith & Credit Fund

## Fund Overview

The Full Faith & Credit Fund is a debt service fund. The fund was created to account for all debt service related to long-term debt issued to the Sandy Urban Renewal Agency (SURA). Funds are transferred in from the Urban Renewal Agency Fund.

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Transfers	1,657,640	1,775,634	1,775,634	1,775,634	1,775,634
<b>Total Resources</b>	<b>1,657,640</b>	<b>1,775,634</b>	<b>1,775,634</b>	<b>1,775,634</b>	<b>1,775,634</b>
Debt Service	1,657,640	1,775,634	1,775,634	1,775,634	1,775,634
<b>Total Requirements</b>	<b>1,657,640</b>	<b>1,775,634</b>	<b>1,775,634</b>	<b>1,775,634</b>	<b>1,775,634</b>

### BN 23-25 Budget Notes

- Transfers reflects the exact amount of money needed to pay for principal and interest on the 2017 Bond.

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
450-000-490272	Transfer from URA	1,657,640	1,775,634	1,775,634	1,775,634	1,775,634
<b>Total Resources</b>		<b>1,657,640</b>	<b>1,775,634</b>	<b>1,775,634</b>	<b>1,775,634</b>	<b>1,775,634</b>
450-000-814100	Bond Principal	1,290,888	1,345,813	1,412,290	1,482,052	1,482,052
450-000-834100	Bond Interest	366,751	429,821	363,344	293,582	293,582
<b>Total Requirements</b>		<b>1,657,640</b>	<b>1,775,634</b>	<b>1,775,634</b>	<b>1,775,634</b>	<b>1,775,634</b>

# Water Fund

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## Fund Overview

The Water Fund accounts for all activities related to supplying residents with clean and safe water for domestic use and fire protection. The fund is split into two departments: operations and capital.

### Operations

The Water Fund operates, maintains, and improves the water treatment, transmission, and distribution systems. These functions include everything from water treatment to meter reading and billing. The treatment system consists of a 2.6 million gallons per day (MGD) rapid sand filtration plant at Alder Creek, and a spring source rated at 0.5 MGD. In addition to these sources, the City purchases 500,000 gallons of water per day from the Portland Water Bureau (with capacity to deliver up to 3 MGD from this source). The City contracts for operations, maintenance, and management of the treatment plant, springs source, and pump stations with Veolia Water.

The transmission and storage system consists of three finished water pumping stations, five reservoirs (totaling 4.75 million gallons of storage) and twelve miles of 16" through 24" pipe. The distribution system contains more than 67 miles of 4" through 12" pipe, more than 4,170 customer meters, twelve pressure regulating stations, and over 420 fire hydrants. The utility also serves over 105 residences and businesses outside the City and three wholesale customers located along the transmission lines.

### Capital Improvements

Capital Improvement projects planned for the water system during this biennium include the Sandy to Portland Filtration Plant Water Transmission System design and immediate need improvements, and condition assessment of the Alder Creek Water Treatment Plant. In addition, the City will begin Program Management of the Drinking Water Reinvestment Program. The City will also complete the lead service line inventory and mapping that is required by the federal government to be complete by October 2024.

## 2021-23 Accomplishments & Highlights

- 446,000,000 gallons of water were produced and delivered to over 4,171 residential, commercial, and industrial accounts and three wholesale customers in 2022.
- Completed and adopted updated Water Master Plan.
- Applied for Drinking Water State Revolving Fund, Special Public Works Fund, and state grants to fund the Drinking Water Reinvestment Program.
- Negotiated new 30-year wholesale water rates with Portland Water Bureau.
- Designed and Constructed Repairs to Sandercock Reservoir.
- Completed Rehabilitation and Repair of Alder Creek Filters 1 and 2.
- Project Poseidon district metering/pressure regulating and leak detection.
- Selected Stantec as Drinking Water Reinvestment Program Manager and began program management activities.
- Tracked 1,258 backflow assemblies.
- Completed Lead and Copper Sampling.
- Cleaned two reservoirs.
- Completed one emergency curtailment exercise.
- Completed emergency ICS level 300 training for four City Staff.

# Water Fund

## Goals

- Complete database of lead inventory of private supply lines and publish system wide map.
- Complete negotiation and adoption of the new 30-year Wholesale Water Agreement with Portland Water Bureau.
- Complete design of Sandy to Portland Water Transmission System to connect to the new Bull Run Filtration Plant and the Columbia Wellfield.
- Complete immediate needs improvements at Alder Creek Water Treatment Plant and Condition Assessment.
- Complete Drinking Water Reinvestment Program Management Plan.
- Advertise RFP for Operations and Maintenance services for Sandy Drinking Water Treatment System and execute new five-year contract.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Miles of Water Pipeline	63	64	66	67	70	72
Gallons of Water Treated (Daily Average)	1,200,000	1,135,000	956,000	1,177,000	1,306,000	1,309,505
Gallons of Water Purchased	166,437,819	172,970,557	182,940,593	186,493,092	185,509,403	166,012,925

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	2.76	2.65	2.91	5.32

# Water Fund

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>					
Beginning Balance	3,644,973	4,851,183	970,470	2,445,615	2,445,615
Fines, Fees, & Assessments	3,178,847	3,345,378	3,684,000	9,840,000	9,840,000
Interest	78,545	74,355	70,000	25,000	25,000
Loan Proceeds	11,653	25,048	67,596	-	-
Miscellaneous	80,713	87,494	50,500	25,000	25,000
<b>Operations Total</b>	<b>6,994,731</b>	<b>8,383,458</b>	<b>4,842,566</b>	<b>12,335,615</b>	<b>12,335,615</b>
Beginning Balance	(1,683,320)	(2,447,120)	-	-	-
Fines, Fees, & Assessments	482,307	580,723	433,000	820,000	820,000
Interest	9,250	(2,494)	-	-	-
Loan Proceeds	-	-	-	11,000,000	11,000,000
Miscellaneous	-	-	-	-	-
<b>Capital Total</b>	<b>(1,191,763)</b>	<b>(1,868,891)</b>	<b>433,000</b>	<b>11,820,000</b>	<b>11,820,000</b>
<b>Total Resources</b>	<b>5,802,968</b>	<b>6,514,567</b>	<b>5,275,566</b>	<b>24,155,615</b>	<b>24,155,615</b>
<b>REQUIREMENTS</b>					
Personnel Services	517,715	527,240	654,500	1,469,000	1,469,000
Materials & Services	1,385,757	1,405,014	1,639,550	2,297,000	2,297,000
Capital Outlay	115,149	1,544,643	233,096	794,000	794,000
Debt Service	4,662	7,113	54,957	9,800	9,800
Transfers	120,058	133,025	176,307	208,454	208,454
Contingency	-	-	971,006	794,500	794,500
<b>Operations Total</b>	<b>2,143,340</b>	<b>3,617,035</b>	<b>3,729,416</b>	<b>5,572,754</b>	<b>5,572,754</b>
Materials & Services	800	-	-	-	-
Capital Outlay	71,040	62,751	150,000	10,836,000	10,836,000
Debt Service	1,183,517	1,198,894	1,196,150	1,011,081	1,011,081
Contingency	-	-	200,000	6,735,780	6,735,780
<b>Capital Total</b>	<b>1,255,357</b>	<b>1,261,645</b>	<b>1,546,150</b>	<b>18,582,861</b>	<b>18,582,861</b>
<b>Total Requirements</b>	<b>3,398,697</b>	<b>4,878,680</b>	<b>5,275,566</b>	<b>24,155,615</b>	<b>24,155,615</b>

### BN 23-25 Budget Notes

- Fines, Fees, & Assessments includes an 36% rate increase in both years.
- Personnel Services reflects the addition of the new FTEs apportioned to the Water Fund.
- Materials & Services includes expense associated with contracting for treatment plant services from Veolia Water.
- Capital Outlay is for the Water System Reinvestment project which includes the new pipeline to the Portland Filtration Plant and investments in the City's Alder Creek Treatment Plant.



# Water Fund

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>						
520-052-401000	Beginning Balance	3,644,973	4,851,183	970,470	2,445,615	2,445,615
520-052-451100	Water Charges	3,152,300	3,313,854	3,664,000	9,800,000	9,800,000
520-052-457100	Engineering Fees	26,547	31,525	20,000	40,000	40,000
520-052-471100	Interest	78,545	74,355	70,000	25,000	25,000
520-052-478000	Miscellaneous Revenue	79,963	87,494	50,000	25,000	25,000
520-052-479030	Surplus Property	750	-	500	-	-
520-052-495400	Loan Proceeds	11,653	25,048	67,596	-	-
<b>Operations Total</b>		<b>6,994,731</b>	<b>8,383,458</b>	<b>4,842,566</b>	<b>12,335,615</b>	<b>12,335,615</b>
520-152-401000	Beginning Balance	(1,683,320)	(2,447,120)	-	-	-
520-152-423000	AFRD Reimbursement	-	-	-	-	-
520-152-433520	Water SDC	478,028	580,723	433,000	820,000	820,000
520-152-459001	Payment in Lieu Water Improvement Fees	4,279	-	-	-	-
520-152-471100	Interest	9,250	(2,494)	-	-	-
520-152-478000	Miscellaneous Revenue	-	-	-	-	-
520-152-495400	Loan Proceeds	-	-	-	11,000,000	11,000,000
<b>Capital Total</b>		<b>(1,191,763)</b>	<b>(1,868,891)</b>	<b>433,000</b>	<b>11,820,000</b>	<b>11,820,000</b>
<b>Total Resources</b>		<b>5,802,968</b>	<b>6,514,567</b>	<b>5,275,566</b>	<b>24,155,615</b>	<b>24,155,615</b>

Requirements are listed on the following page.

# Water Fund

## REQUIREMENTS

520-052-511100	Salaries	323,633	324,859	409,000	855,000	855,000
520-052-511200	Overtime	15,484	11,382	-	20,000	20,000
520-052-521100	Insurance Benefits	61,769	55,206	81,000	239,000	239,000
520-052-521200	FICA Taxes	26,046	25,720	32,000	68,000	68,000
520-052-521300	PERS	73,060	88,965	110,000	250,000	250,000
520-052-521360	Other Benefits	7,449	5,232	-	-	-
520-052-521500	Workers' Benefit Fund	240	195	500	500	500
520-052-521600	Unemployment Insurance	341	338	500	3,500	3,500
520-052-521700	Paid Leave Oregon Tax	-	-	-	3,500	3,500
520-052-521800	Workers' Comp Insurance	7,650	13,325	19,000	24,000	24,000
520-052-521900	Transit Tax	2,043	2,019	2,500	5,500	5,500
520-052-601100	Supplies	110,842	132,131	125,000	182,000	182,000
520-052-601200	Postage	4,431	2,604	2,000	2,000	2,000
520-052-601300	Printing	80	(96)	100	500	500
520-052-601400	Copier Charges	797	102	100	200	200
520-052-601401	Branding & Marketing	253	-	-	-	-
520-052-601500	Public Notices	3,541	1,892	1,000	1,000	1,000
520-052-601600	Organizational Fees	12,490	15,838	20,000	30,000	30,000
520-052-601700	Memberships	1,540	550	1,000	1,500	1,500
520-052-601800	Books and Subscriptions	495	55	100	200	200
520-052-601900	Uniforms	895	1,944	2,000	3,000	3,000
520-052-602100	Employee Recruitment	221	76	100	15,000	15,000
520-052-602200	Conferences	828	315	1,000	15,000	15,000
520-052-602300	Training & Professional Advancement	3,592	2,762	2,000	8,000	8,000
520-052-602500	Meetings & Meals	205	244	200	600	600
520-052-603100	Mileage Reimbursement	6	71	100	300	300
520-052-603200	Vehicle -Fuel	7,554	7,573	7,700	13,000	13,000
520-052-603400	Vehicle Reg/Licenses	-	-	100	200	200
520-052-603500	Vehicle Repair & Maintenance	11,342	12,297	7,000	7,000	7,000
520-052-604100	Repairs & Maintenance	80,872	77,488	100,000	100,000	100,000
520-052-605100	Contractual Services	32,254	17,745	35,000	40,000	40,000
520-052-605300	Contractual Services - Water	456,080	399,047	480,750	540,000	540,000
520-052-605350	Contractual Services - Utility Billing	13,931	10,976	11,000	12,000	12,000
520-052-606100	Equipment Rental	3,668	1,884	12,000	65,000	65,000
520-052-607100	Utilities	203,005	228,226	240,000	285,000	285,000
520-052-608100	Professional Services	22,630	15,136	35,000	40,000	40,000
520-052-608200	Professional Services - Engineering	16,132	7,221	25,000	40,000	40,000
520-052-609100	Insurance	36,290	50,081	45,000	66,000	66,000
520-052-610200	Fees	14,205	13,622	11,000	11,500	11,500
520-052-628200	Credit Card Merchant Fee	24,856	35,462	35,000	68,000	68,000
520-052-650100	Chemicals	-	-	8,300	10,000	10,000
520-052-650201	Program - Water Conservation	480	463	3,000	4,000	4,000
520-052-650300	Regulatory Fees	9,503	8,876	10,000	11,000	11,000
520-052-650500	Water Testing	13,067	14,505	19,000	20,000	20,000
520-052-650505	Purchased Water	299,671	345,927	400,000	705,000	705,000
520-052-732000	Water System Improvements	86,114	32,270	90,000	300,000	300,000
520-052-732003	Water Automated Meter Reader	-	1,478,168	25,500	25,000	25,000
520-052-740000	Furniture & Office Equipment	-	113	-	74,000	74,000
520-052-740100	Computer Equipment	2,022	928	-	15,000	15,000
520-052-760000	Machinery & Equipment	12,739	33,164	67,596	80,000	80,000
520-052-772000	Major Repairs Water System	14,274	-	50,000	300,000	300,000
520-052-812100	Loan Principal	4,662	7,113	54,957	9,800	9,800
520-052-910110	Transfer to General Fund	105,363	115,887	159,169	181,354	181,354
520-052-910370	Transfer to Facilities Maint. Fund	3,240	3,200	3,200	3,200	3,200
520-052-910670	Transfer to Op Ctr ISF	11,455	13,938	13,938	23,900	23,900
520-052-950000	Contingency	-	-	971,006	794,500	794,500
<b>Operations Total</b>		<b>2,143,340</b>	<b>3,617,035</b>	<b>3,729,416</b>	<b>5,572,754</b>	<b>5,572,754</b>
520-152-608100	Professional Services	800	-	-	-	-
520-152-732000	Water System Improvements	71,040	62,751	150,000	150,000	150,000
520-152-732100	Portland Pipeline Project	-	-	-	8,686,000	8,686,000
520-152-732200	Aldercreek Improvements	-	-	-	2,000,000	2,000,000
520-152-812150	Loan Principal	582,282	614,987	649,523	686,011	686,011
520-152-812303	State Revolving Loan Principal	224,203	248,097	252,282	-	-
520-152-812304	Business Oregon Loan Principal	-	-	-	35,098	35,098
520-152-832303	State Revolving Loan Interest	20,124	11,607	4,683	-	-
520-152-832304	Business Oregon Loan Interest	-	-	-	36,792	36,792
520-152-832910	Loan Interest	356,909	324,204	289,662	253,180	253,180
520-152-950000	Contingency	-	-	200,000	6,735,780	6,735,780
<b>Capital Total</b>		<b>1,255,357</b>	<b>1,261,645</b>	<b>1,546,150</b>	<b>18,582,861</b>	<b>18,582,861</b>
<b>Total Requirements</b>		<b>3,398,697</b>	<b>4,878,680</b>	<b>5,275,566</b>	<b>24,155,615</b>	<b>24,155,615</b>

# Wastewater Fund

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## Department Overview

The Wastewater Fund accounts for all activities related to wastewater collection, conveyance, and treatment. The fund is split into two departments: operations and capital.

### Operations

The Wastewater Fund operates, maintains, and improves the wastewater collection, conveyance, and pumping and treatment systems. The treatment system consists of a 1.25 million gallons per day (MGD) advanced tertiary treatment plant. The City contracts with Veolia Water for operation and maintenance services at the treatment plant. Ultraviolet disinfection is used on the treated effluent to eliminate any risk of chlorinated discharges to Tickle Creek. The City runs an innovative and award-winning Class B recycled water program partnering with a local nursery during May through October, eliminating the need to discharge to Tickle creek during low flow months.

The collection system is comprised of over 48.3 miles of 4” through 21” pipe and six pump stations. Prior to improvements in recent years, Sandy’s collection system had significantly deteriorated over, allowing rainfall and groundwater to enter the system and periodically overwhelm the treatment plant’s capacity. To mitigate these and other issues, the Sandy Clean Waters Program targeted rehabilitation of the four oldest and leakiest collection system basins. These efforts have achieved marked reduction in rainfall-derived infiltration and inflow (RDII) into the system.

### Capital Improvements

Historic reinvestment is occurring with regard to capital improvement projects for the existing wastewater treatment plant and collection system. These projects, collectively referred to as Phase 1A of the Sandy Clean Waters Program, will conclude in the current biennium. Additional capital expenditures include work on subsequent phases of the wastewater system improvement program, including permitting and design work for the treatment plant expansion and proposed Sandy River outfall.

## 2021-23 Accomplishments & Highlights

- Completed collection system design and construction, and private lateral rehabilitation, for Basins 2, 6, 7, and 8.
- Completed design and construction of Phase 1A Immediate Needs Improvement Project at the Wastewater Treatment Plant.
- Completed \$200,000 in RRM small improvements at the Wastewater Treatment Plant.
- Completed Sampling and Stress Testing of Wastewater Treatment Plant.
- Completed flow monitoring and validation testing of RDII reduction, achieved through collection system rehabilitation projects.
- Launched Manhole Grouting Program.
- Submitted NPDES permit application form 2A for Sandy River Outfall.
- Advertised and selected consultant for Facility Plan Amendment; Began work on Amendment.
- Advertised and selected Program Management Consultant for Phase 1B of Sandy Clean Waters.
- Awarded \$14.7M ARPA grant; began work related to this grant.
- Completed and executed second \$46 Million Clean Water State Revolving Fund loan application.
- Submitted WIFIA \$49.9 million loan application.
- Cleaned 8 miles of collection system piping.
- Connected SandyNet Fiber to the Wastewater Treatment Plant.

# Wastewater Fund

## Goals

- Complete Stress Testing and Comprehensive Capacity Evaluation to re-rate existing wastewater treatment plant.
- Complete Wastewater Facilities Plan Amendment.
- Continue to progress the Sandy River Outfall NPDES permit application process.
- Complete smoke testing and CCTV investigation of remaining six basins (Basins 1, 3, 4, 5, 9, and 10) and identify Category 4 and 5 defects.
- Close on WIFIA loan.
- Launch CMOM program.
- Begin design of Phase 1B upgrades.
- Identify and progress RRM improvements at wastewater treatment plant.
- Advertise RFP for operations and maintenance services for the wastewater treatment plant and execute a new five-year agreement.
- Connect final two remote pump stations to City fiber network.
- Clean 10,000 lineal feet of collection system piping annually.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Gallons of Wastewater Treated (Daily Average)	1,600,000	1,125,000	1,400,000	1,202,000	1,324,000	1,328,000

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	2.76	3.15	3.41	5.28

2023-2025 Approved Budget

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City of Sandy, Oregon

# Wastewater Fund

## Budget Summary & Detail

	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>					
Beginning Balance	344,122	557,884	918,233	4,951,070	4,951,070
Fines, Fees, & Assessments	2,907,632	5,183,092	6,020,000	10,145,000	10,145,000
Interest	20,728	25,964	20,000	30,000	30,000
Loan Proceeds	11,653	15,828	87,096	74,638	74,638
Miscellaneous	65,120	11,584	5,000	-	-
<b>Operations Total</b>	<b>3,349,255</b>	<b>5,794,351</b>	<b>7,050,329</b>	<b>15,200,708</b>	<b>15,200,708</b>
Beginning Balance	125,523	(143,587)	-	-	-
Fines, Fees, & Assessments	455,188	549,860	400,000	1,360,000	1,360,000
Grants	-	-	-	6,460,687	6,460,687
Interest	594	1,646	2,816	-	-
Transfers	-	-	1,875,957	-	-
Loan Proceeds	128,760	2,865,665	20,000,000	7,891,250	7,891,250
<b>Capital Total</b>	<b>710,065</b>	<b>3,273,584</b>	<b>22,278,773</b>	<b>15,711,937</b>	<b>15,711,937</b>
<b>Total Resources</b>	<b>4,059,320</b>	<b>9,067,936</b>	<b>29,329,102</b>	<b>30,912,645</b>	<b>30,912,645</b>
<b>REQUIREMENTS</b>					
Personnel Services	515,827	598,728	763,000	1,443,000	1,443,000
Materials & Services	1,861,196	2,443,334	2,304,935	3,603,800	3,603,800
Capital Outlay	282,752	1,342,193	537,096	454,500	454,500
Debt Service	4,662	6,603	30,743	6,200	6,200
Transfers	126,925	140,808	170,979	331,512	331,512
Contingency	-	-	2,954,408	2,609,900	2,609,900
<b>Operations Total</b>	<b>2,791,361</b>	<b>4,531,666</b>	<b>6,761,161</b>	<b>8,448,912</b>	<b>8,448,912</b>
Capital Outlay	469,230	2,646,794	-	-	-
Debt Service	334,422	334,422	4,067,941	1,745,052	1,745,052
Transfers	50,000	100,000	-	-	-
Contingency	-	-	-	10,737,117	10,737,117
<b>Capital Total</b>	<b>853,652</b>	<b>3,081,216</b>	<b>4,067,941</b>	<b>12,482,169</b>	<b>12,482,169</b>
Capital Outlay	-	-	18,500,000	9,981,564	9,981,564
<b>WWSI Project Total</b>	<b>-</b>	<b>-</b>	<b>18,500,000</b>	<b>9,981,564</b>	<b>9,981,564</b>
<b>Total Requirements</b>	<b>3,645,013</b>	<b>7,612,882</b>	<b>29,329,102</b>	<b>30,912,645</b>	<b>30,912,645</b>

### BN 23-25 Budget Notes

- Fines, Fees, & Assessments includes a 16% rate increase in years one and two.
- Personnel Services reflects the addition of the new FTEs apportioned to the Wastewater Fund.
- Loan proceeds includes a portion from two financings: a \$46 million Clean Water State Revolving Fund Loan and \$49.9 million Water Infrastructure Finance and Innovation Act (WIFIA) loan.
- Materials & Services includes expenses associated with contracting for treatment plant services from Veolia Water.
- Fund Balances reflect the building up of funds for future capital and maintaining minimum debt coverage ratios.

# Wastewater Fund

Account Number	Account Name	BN17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>						
530-053-401000	Beginning Balance	344,122	557,884	918,233	4,951,070	4,951,070
530-053-452100	Wastewater Charges	2,866,484	5,156,504	6,000,000	10,070,000	10,070,000
530-053-457100	Engineering Fees	41,148	26,588	20,000	75,000	75,000
530-053-471100	Interest	20,728	25,964	20,000	30,000	30,000
530-053-478000	Miscellaneous Revenue	64,170	11,584	5,000	-	-
530-053-479030	Surplus Property	950	-	-	-	-
530-053-495355	Interfund Loan Receipts	-	-	-	74,638	74,638
530-053-495400	Loan Proceeds	11,653	15,828	87,096	-	-
<b>Operations Total</b>		<b>3,349,255</b>	<b>5,794,351</b>	<b>7,050,329</b>	<b>15,200,708</b>	<b>15,200,708</b>
530-153-401000	Beginning Balance	125,523	(143,587)	-	-	-
530-153-428303	AFRD Due CoS Bluff Est I	44,175	-	-	-	-
530-153-433530	Wastewater SDC	405,796	549,860	400,000	1,360,000	1,360,000
530-153-433535	North Bluff Sewer SDCs	5,217	-	-	-	-
530-153-471100	Interest	594	1,646	2,816	-	-
530-153-490440	Transfer from Sewer Bond Reserve Fund	-	-	1,875,957	-	-
530-153-440300	Federal Grants	-	-	-	6,460,687	6,460,687
530-153-440310	WIFIA Loan Proceeds	-	-	-	3,638,828	3,638,828
530-153-495200	Bond Proceeds	-	-	15,000,000	-	-
530-153-495400	Loan Proceeds	128,760	2,865,665	5,000,000	4,252,422	4,252,422
<b>Capital Total</b>		<b>710,065</b>	<b>3,273,584</b>	<b>22,278,773</b>	<b>15,711,937</b>	<b>15,711,937</b>
<b>Total Resources</b>		<b>4,059,320</b>	<b>9,067,936</b>	<b>29,329,102</b>	<b>30,912,645</b>	<b>30,912,645</b>

Requirements are listed on the following page.

# Wastewater Fund

REQUIREMENTS						
530-053-511100	Salaries	323,633	374,292	488,000	852,000	852,000
530-053-511200	Overtime	15,484	14,875	-	20,000	20,000
530-053-521100	Insurance Benefits	61,769	59,382	81,000	217,000	217,000
530-053-521200	FICA Taxes	26,045	29,792	37,000	68,000	68,000
530-053-521300	PERS	73,060	101,656	128,000	249,000	249,000
530-053-521360	Other Benefits	7,449	6,034	-	-	-
530-053-521500	Workers' Benefit Fund	240	230	500	500	500
530-053-521600	Unemployment Insurance	340	391	500	3,500	3,500
530-053-521700	Paid Leave Oregon Tax	-	-	-	3,500	3,500
530-053-521800	Workers' Comp Insurance	5,763	9,738	25,000	24,000	24,000
530-053-521900	Transit Tax	2,043	2,338	3,000	5,500	5,500
530-053-601100	Supplies	31,695	46,951	40,000	59,000	59,000
530-053-601200	Postage	3,335	1,824	1,000	1,000	1,000
530-053-601300	Printing	80	-	1,000	1,500	1,500
530-053-601400	Copier Charges	195	10,706	2,500	1,000	1,000
530-053-601401	Branding & Marketing	253	1,604	-	-	-
530-053-601500	Public Notices	120	2,694	2,500	3,000	3,000
530-053-601600	Organizational Fees	1,070	385	900	4,000	4,000
530-053-601700	Memberships	540	1,320	550	1,000	1,000
530-053-601800	Books and Subscriptions	56	5,988	100	500	500
530-053-601900	Uniforms	900	2,021	2,000	6,000	6,000
530-053-602100	Employee Recruitment	196	75	100	15,000	15,000
530-053-602200	Conferences	198	700	1,000	20,000	20,000
530-053-602300	Training & Professional Advancement	3,049	1,725	1,200	8,000	8,000
530-053-602500	Meetings & Meals	699	31	50	600	600
530-053-603100	Mileage Reimbursement	6	2	10	200	200
530-053-603200	Vehicle - Fuel	7,554	7,995	8,000	13,000	13,000
530-053-603500	Vehicle Repair & Maintenance	11,922	15,617	7,500	8,000	8,000
530-053-604100	Repairs & Maintenance	214,079	485,285	300,000	300,000	300,000
530-053-605100	Contractual Services	61,217	30,876	50,000	250,000	250,000
530-053-605300	Contractual Services - Wastewater	1,025,400	1,345,949	1,354,525	1,350,000	1,350,000
530-053-605350	Contractual Services - Utility Billing	12,884	10,976	12,000	13,000	13,000
530-053-605360	Contractual Services - Waste Hauling	-	-	-	336,000	336,000
530-053-606100	Equipment Rental	10,471	37,156	30,000	30,000	30,000
530-053-607100	Utilities	241,963	239,913	270,000	298,000	298,000
530-053-608100	Professional Services	5,741	32,473	32,000	12,000	12,000
530-053-608200	Professional Services - Engineering	43,608	13,520	20,000	30,000	30,000
530-053-609100	Insurance	79,643	85,056	33,000	76,000	76,000
530-053-610200	Fees	12,044	13,527	15,000	15,000	15,000
530-053-628200	Credit Card Merchant Fee	23,651	35,462	40,000	69,000	69,000
530-053-650100	Chemicals	-	-	70,000	668,000	668,000
530-053-650300	Regulatory Fees	68,627	13,505	10,000	15,000	15,000
530-053-732003	Wastewater Automated Meter Reader	-	748,475	-	-	-
530-053-733000	Wastewater System Improvements	149,391	249,746	200,000	300,000	300,000
530-053-740000	Furniture & Office Equipment	-	136	-	2,000	2,000
530-053-740100	Computer Equipment	1,006	1,721	-	12,500	12,500
530-053-760000	Machinery & Equipment	23,939	53,617	87,096	80,000	80,000
530-053-773000	Major Repairs - Wastewater	8,576	10,000	30,000	60,000	60,000
530-053-780000	Oversizing/Special Proj.	99,840	278,497	220,000	-	-
530-053-812100	Loan Principal	4,662	6,603	30,743	6,200	6,200
530-053-910110	Transfers to General Fund	112,231	123,670	153,841	304,412	304,412
530-053-910370	Transfer to Facilities Maint. Fund	3,239	3,200	3,200	3,200	3,200
530-053-910670	Transfer to Op Ctr ISF	11,455	13,938	13,938	23,900	23,900
530-053-950000	Contingency	-	-	2,954,408	2,609,900	2,609,900
<b>Operations Total</b>		<b>2,791,361</b>	<b>4,531,666</b>	<b>6,761,161</b>	<b>8,448,912</b>	<b>8,448,912</b>
530-153-733000	Sewer System Improvements	422,544	2,645,789	-	-	-
530-153-773020	North Bluff Sewer SDC Reim	2,511	1,005	-	-	-
530-153-773025	AFRD Reimbursement	44,175	-	-	-	-
530-153-812302	USDA Principal	123,379	135,379	1,992,879	-	-
530-153-812303	DEQ Principal	-	-	391,888	816,456	816,456
530-153-812803	Full Faith & Credit Principal	-	-	115,000	135,000	135,000
530-153-812903	Bond Principal	-	-	550,000	-	-
530-153-832302	USDA Interest	211,043	199,043	47,331	-	-
530-153-832303	DEQ Interest	-	-	278,747	687,996	687,996
530-153-832802	Full Faith & Credit Interest	-	-	138,721	103,600	103,600
530-153-832902	Bond Interest	-	-	525,000	-	-
530-153-870000	Paying Agent Fees	-	-	28,375	2,000	2,000
530-153-910440	Transfer to Bond Reserve Fund	50,000	100,000	-	-	-
530-153-960000	Contingency	-	-	-	10,737,117	10,737,117
<b>Capital Total</b>		<b>853,652</b>	<b>3,081,216</b>	<b>4,067,941</b>	<b>12,482,169</b>	<b>12,482,169</b>
530-353-733000	Wastewater System Improvement Project	-	-	18,500,000	9,981,564	9,981,564.00
<b>Wastewater System Improvement Project Total</b>		<b>-</b>	<b>-</b>	<b>18,500,000</b>	<b>9,981,564</b>	<b>9,981,564</b>
<b>Total Requirements</b>		<b>3,645,013</b>	<b>7,612,882</b>	<b>29,329,102</b>	<b>30,912,645</b>	<b>30,912,645</b>

# Stormwater Fund

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## Fund Overview

The Stormwater Fund accounts for expenses related to operations and maintenance of the City's stormwater system. The fund is split into two departments: operations and capital. In order to balance the stormwater budget for the upcoming biennium a \$3.00 per month increase in the stormwater rate per ERU is assumed. The monthly charge per Equivalent Residential Unit (2,750 sq. ft. of impervious surface roughly equal to the impervious surface on a typical single-family dwelling site) would increase from \$5.00 per month to \$8.00 per month. This is necessary to pay off new debt service required for the Strawbridge Parkway emergency repair that occurred in June 2022, and to structurally stabilize the fund.

## Operations

The Stormwater Fund operates and maintains the stormwater system which consists of catch basins, manholes, pipes, culverts, ponds, swales, and open channels. As 'soft path' stormwater management techniques become more common, stormwater facility maintenance becomes more labor-intensive. Swales, detention ponds and basins are now elaborately landscaped - for aesthetics and for stormwater treatment. Regular site visits and semi-annual pruning and weeding of these facilities are required.

## Capital Improvements

The City does not have a System Development Charge (SDC) for Stormwater. Since all new development must detain and treat any runoff greater than the pre-development condition, nearly all stormwater improvements are intended to deal with runoff from property developed prior to detention and treatment requirements. SDCs may not be used for repairs to existing facilities or to address issues related to existing development. The City intends to draft a Stormwater Master Plan that would identify deficiencies, needs, and a capital improvement plan.

## 2021-23 Accomplishments & Highlights

- Emergency fix to the Strawbridge Parkway stormwater line and additional liner repair on Tupper Road.
- Completed City of Sandy Mercury Update for Sandy River and Willamette River Total Maximum Daily Load Implementation Plan.
- Removed overgrown and invasive vegetation from nine stormwater detention basins.
- Cleaned over 750 catch basins and over 50,000 lineal feet of storm line each year.

## Goals

- Complete Five-Year Update of Sandy River and Willamette River Total Maximum Daily Load Implementation Plan.
- Replace 25% of Contech filters each year.
- Continue to clean all catch basins, filters, and treatment structures every two years.
- Manage vegetation (using hand trimming, pruning and removal) in stormwater treatment facilities. for enhanced flow and aesthetics.
- Begin Stormwater Master Plan.
- Complete rate study to put the fund on a cost recovery plan.



# Stormwater Fund

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	1.52	2.37	2.35	2.18

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>					
Beginning Balance	782,873	866,794	304,791	32,942	32,942
Fines, Fees, & Assessments	504,925	522,213	557,000	1,410,000	1,410,000
Interest	20,294	12,336	12,500	500	500
Loan Proceeds	11,653	6,609	60,610	100,000	100,000
Miscellaneous	2,900	4,761	4,000	10,000	10,000
<b>Operations Total</b>	<b>1,322,645</b>	<b>1,412,713</b>	<b>938,901</b>	<b>1,553,442</b>	<b>1,553,442</b>
Beginning Balance	(255,567)	(375,427)	-	-	-
<b>Capital Total</b>	<b>(255,567)</b>	<b>(375,427)</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Resources</b>	<b>1,067,078</b>	<b>1,037,286</b>	<b>938,901</b>	<b>1,553,442</b>	<b>1,553,442</b>
<b>REQUIREMENTS</b>					
Personnel Services	262,887	423,814	481,000	566,000	566,000
Materials & Services	129,608	143,397	156,300	374,700	374,700
Capital Outlay	16,522	12,453	70,610	76,000	76,000
Debt Service	4,662	6,544	7,211	2,000	2,000
Transfers	42,173	47,578	81,234	102,675	102,675
Contingency	-	-	23,301	16,310	16,310
<b>Operations Total</b>	<b>455,852</b>	<b>633,786</b>	<b>819,656</b>	<b>1,137,685</b>	<b>1,137,685</b>
Capital Outlay	-	-	-	100,000	100,000
Debt Service	119,860	119,680	119,245	215,757	215,757
Contingency	-	-	-	100,000	100,000
<b>Capital Total</b>	<b>119,860</b>	<b>119,680</b>	<b>119,245</b>	<b>415,757</b>	<b>415,757</b>
<b>Total Requirements</b>	<b>575,712</b>	<b>753,466</b>	<b>938,901</b>	<b>1,553,442</b>	<b>1,553,442</b>

### BN 23-25 Budget Notes

- Fines, Fees, & Assessments reflects a \$3.00 per month increase in utility rates in year one, and an additional \$2.00 per month increase in year two.
- Debt service includes the annual payments to the Wastewater Fund for a \$400,000 interfund loan issued in fiscal year 2023 for the Tupper Park and Strawbridge Parkway emergency repairs.

## Stormwater Fund

Account Number	Account Name	BN17-19 Actual	BN19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>						
550-055-401000	Beginning Balance	782,873	866,794	304,791	32,942	32,942
550-055-452500	Stormwater Charges	478,778	496,972	540,000	1,400,000	1,400,000
550-055-457100	Engineering Fees	26,147	25,241	17,000	10,000	10,000
550-055-471100	Interest	20,294	12,336	12,500	500	500
550-055-478000	Miscellaneous Revenue	2,900	4,761	4,000	10,000	10,000
550-055-479030	Surplus Property	-	-	-	-	-
550-055-495400	Loan Proceeds	11,653	6,609	60,610	100,000	100,000
<b>Operations Total</b>		<b>1,322,645</b>	<b>1,412,713</b>	<b>938,901</b>	<b>1,553,442</b>	<b>1,553,442</b>
550-155-401000	Beginning Balance	(255,567)	(375,427)	-	-	-
<b>Capital Total</b>		<b>(255,567)</b>	<b>(375,427)</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Resources</b>		<b>1,067,078</b>	<b>1,037,286</b>	<b>938,901</b>	<b>1,553,442</b>	<b>1,553,442</b>

Requirements are listed on the following page.

## Stormwater Fund

REQUIREMENTS						
550-055-511100	Salaries	164,768	263,530	300,000	327,000	327,000
550-055-511200	Overtime	8,872	11,332	-	16,000	16,000
550-055-521100	Insurance Benefits	34,516	46,905	58,000	82,000	82,000
550-055-521200	FICA Taxes	13,327	21,011	23,000	26,000	26,000
550-055-521300	PERS	34,164	69,507	78,000	98,000	98,000
550-055-521360	Other Benefits	3,346	5,231	-	-	-
550-055-521500	Workers' Benefit Fund	143	166	1,000	500	500
550-055-521600	Unemployment Insurance	174	270	1,000	1,500	1,500
550-055-521700	Paid Leave Oregon Tax	-	-	-	1,500	1,500
550-055-521800	Workers' Comp Insurance	2,533	4,220	18,000	11,000	11,000
550-055-521900	Transit Tax	1,044	1,644	2,000	2,500	2,500
550-055-601100	Supplies	18,150	29,345	25,000	40,000	40,000
550-055-601200	Postage	1,385	1,282	800	1,000	1,000
550-055-601400	Copier Charges	179	0	100	100	100
550-055-601401	Branding & Marketing	253	-	-	-	-
550-055-601500	Public Notices	-	-	100	-	-
550-055-601600	Organizational Fees	370	385	400	1,000	1,000
550-055-601700	Memberships	15	-	400	500	500
550-055-601800	Books and Subscriptions	86	55	100	1,000	1,000
550-055-601900	Uniforms	894	1,948	2,000	4,000	4,000
550-055-602100	Employee Recruitment	372	76	100	5,000	5,000
550-055-602200	Conferences	-	-	1,000	8,000	8,000
550-055-602300	Training & Professional Advancement	788	7	500	4,000	4,000
550-055-602500	Meetings & Meals	127	4	100	1,000	1,000
550-055-603100	Mileage Reimbursement	6	2	100	500	500
550-055-603200	Vehicle - Fuel	7,554	7,617	7,000	14,000	14,000
550-055-603400	Vehicle Reg/License	-	-	100	100	100
550-055-603500	Vehicle Repair & Maintenance	10,233	13,539	7,000	7,000	7,000
550-055-604100	Repairs & Maintenance	15,664	16,328	35,000	40,000	40,000
550-055-605100	Contractual Services	1,231	740	2,500	9,000	9,000
550-055-605350	Contractual Services - Utility Billing	13,098	10,827	11,000	11,000	11,000
550-055-606100	Equipment Rental	6,536	858	2,000	1,000	1,000
550-055-607100	Utilities	2,584	2,728	3,000	8,000	8,000
550-055-608100	Professional Services	450	774	2,500	25,000	25,000
550-055-608200	Professional Services - Engineering	12,857	8,777	10,000	120,000	120,000
550-055-610200	Fees	13,725	13,957	14,000	7,000	7,000
550-055-628200	Credit Card Merchant Fee	23,050	34,148	30,000	65,000	65,000
550-055-650300	Regulatory Fees	-	-	1,500	1,500	1,500
550-055-732000	Improvements	-	-	10,000	20,000	20,000
550-055-740000	Furniture & Office Equipment	-	112	-	-	-
550-055-740100	Computer Equipment	896	1,057	-	12,000	12,000
550-055-760000	Machinery & Equipment	15,626	11,284	60,610	44,000	44,000
550-055-812100	Loan Principal	4,662	6,544	7,211	2,000	2,000
550-055-910110	Transfer to General Fund	27,479	30,440	64,096	75,575	75,575
550-055-910370	Transfer to Facilities Maint. Fund	3,239	3,200	3,200	3,200	3,200
550-055-910670	Transfer to Op Ctr ISF	11,455	13,938	13,938	23,900	23,900
550-055-950000	Contingency	-	-	23,301	16,310	16,310
<b>Operations Total</b>		<b>455,852</b>	<b>633,786</b>	<b>819,656</b>	<b>1,137,685</b>	<b>1,137,685</b>
550-155-732000	Improvements	-	-	-	100,000	100,000
550-155-812200	Interfund Loan Principal	-	-	-	74,638	74,638
550-155-812300	Bond Principal	70,000	75,000	80,000	95,000	95,000
550-155-830001	Interfund Loan Interest	-	-	-	13,124	13,124
550-155-836900	Bond Interest	49,860	44,680	39,245	32,995	32,995
550-155-950000	Contingency	-	-	-	100,000	100,000
<b>Capital Total</b>		<b>119,860</b>	<b>119,680</b>	<b>119,245</b>	<b>415,757</b>	<b>415,757</b>
<b>Total Requirements</b>		<b>575,712</b>	<b>753,466</b>	<b>938,901</b>	<b>1,553,442</b>	<b>1,553,442</b>

# SandyNet Fund

## Fund Overview

The SandyNet Fund accounts for the operating and maintaining of the City’s telecommunications utility, which includes the fiber-to-the-home network. The fund is split into two departments: operations and capital.



### Operations

SandyNet is the City’s municipal internet service utility. The purpose of SandyNet is to provide fast, reliable, and affordable internet connectivity to community members and businesses in the Sandy area. This is accomplished by using a variety of technologies including wireless, fiber optic, and copper networks.

### Capital

Capital improvements planned in this budget include the expansion of the SandyNet Fiber network into new developments, as well as replacing datacenter and in-home electronics to support today’s higher demands. Network infrastructure upgrades are also forecasted.

## 2021-23 Accomplishments & Highlights

- Enrolled in FCC’s Affordable Connectivity Program to offer rate assistance to qualifying households.
- Upgraded core network to support future bandwidth demands.
- Entered into two intergovernmental agreements with Clackamas Broadband eXchange (CBX) to:
  - offer business level service around Clackamas County, and
  - offer rural broadband to specific underserved areas in the Sandy area.
- Began to phase in XGS-PON for future speed tiers.
- Implemented IPv6 to core network.

## Goals

- Keep up with service demand as new developments are constructed.
- Work with rental companies and deploy PON technologies to multiple-dwelling-units.
- Work with other entities to help eliminate the “digital divide” in and around Sandy.
- Begin to phase out old fiber network technologies.
- Continue to replace aging modems in customer homes.
- Complete SandyNet Master/Business Plan.

## Performance Measures

	2017	2018	2019	2020	2021	2022
Households with SandyNet	71%	70%	74%	75%	79%	80%

## Staffing

	17-19	19-21	21-23	23-25
Total FTE	6.10	6.09	7.00	7.50

# SandyNet Fund

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>					
Beginning Balance	1,089,660	2,636,996	125,638	139,843	139,843
Fines, Fees, & Assessments	3,048,366	3,801,579	4,068,464	5,082,000	5,082,000
Interest	667	-	-	-	-
Miscellaneous Revenue	142,479	103,873	-	15,000	15,000
General Revenue	162,817	150,000	60,000	-	50,000
<b>Operations Total</b>	<b>4,443,988</b>	<b>6,692,448</b>	<b>4,254,102</b>	<b>5,236,843</b>	<b>5,286,843</b>
Beginning Balance	(1,750,479)	(2,956,473)	-	-	-
Fines, Fees, & Assessments	72,070	65,736	50,000	60,000	60,000
Interest	548	343	-	-	-
Loan Proceeds	796,457	38,334	-	50,000	50,000
<b>Capital Total</b>	<b>(881,404)</b>	<b>(2,852,060)</b>	<b>50,000</b>	<b>110,000</b>	<b>110,000</b>
<b>Total Resources</b>	<b>3,562,584</b>	<b>3,840,388</b>	<b>4,304,102</b>	<b>5,346,843</b>	<b>5,396,843</b>
<b>REQUIREMENTS</b>					
Personnel Services	1,084,612	1,191,839	1,628,000	2,021,300	2,021,300
Materials & Services	610,137	557,048	676,310	938,950	988,950
Capital Outlay	6,512	10,659	-	10,000	10,000
Transfers	105,732	112,326	205,662	247,063	247,063
Contingency	-	-	62,425	51,819	51,819
<b>Operations Total</b>	<b>1,806,992</b>	<b>1,871,871</b>	<b>2,572,397</b>	<b>3,269,132</b>	<b>3,319,132</b>
Capital Outlay	706,630	566,164	420,000	747,000	747,000
Debt Service	1,368,439	1,428,575	1,311,705	1,330,711	1,330,711
<b>Capital Total</b>	<b>2,075,069</b>	<b>1,994,738</b>	<b>1,731,705</b>	<b>2,077,711</b>	<b>2,077,711</b>
<b>Total Requirements</b>	<b>3,882,062</b>	<b>3,866,610</b>	<b>4,304,102</b>	<b>5,346,843</b>	<b>5,396,843</b>

### BN 23-25 Budget Notes

- Operations Fines, Fees, & Assessments includes charges for SandyNet services (WiFi, fiber, Voice, etc.).
- Operations General Revenue includes a one-time \$50,000 contribution from General Fund surplus to help cover the costs associated with the SandyNet Master/Business Plan.
- Capital Fines, Fees, & Assessments includes installation charges for new customers.
- Personnel Services includes the addition of 0.5 FTE for a utility worker position.
- Debt Service includes the original construction bond and principal and interest payments for the interfund loan from the Transit Fund.

## SandyNet Fund

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>						
560-056-401000	Beginning Balance	1,089,660	2,636,996	125,638	139,843	139,843
560-056-451500	FTTH Charges	2,427,003	3,058,334	3,300,000	4,000,000	4,000,000
560-056-451510	Voice Charges	94,254	112,734	110,000	156,000	156,000
560-056-451520	Video Charges	2,209	1,701	2,000	-	-
560-056-451530	Rural Fiber	-	7,726	16,464	146,000	146,000
560-056-451700	Wireless Charges	49,697	89,555	90,000	100,000	100,000
560-056-451800	Business Charges	315,024	383,739	400,000	540,000	540,000
560-056-451810	Business Charges - CBX	-	-	-	40,000	40,000
560-056-451900	BIP Rural Charges	170,179	140,789	150,000	100,000	100,000
560-056-457200	Software Licensing Fees	(10,000)	7,000	-	-	-
560-056-471100	Interest	667	-	-	-	-
560-056-478000	Miscellaneous Revenue	142,479	103,873	-	15,000	15,000
560-056-490139	Transfer from Non-Dept.	-	-	-	-	50,000
560-056-490110	General Revenue	162,817	150,000	60,000	-	-
<b>Operations Total</b>		<b>4,443,988</b>	<b>6,692,448</b>	<b>4,254,102</b>	<b>5,236,843</b>	<b>5,286,843</b>
560-156-401000	Beginning Balance	(1,750,479)	(2,956,473)	-	-	-
560-156-451530	Fiber Installation Charges	72,070	65,736	50,000	60,000	60,000
560-156-471100	Interest	548	343	-	-	-
560-156-495300	Loan Proceeds	296,457	38,334	-	50,000	50,000
560-156-495644	Interfund Loan Proceeds	500,000	-	-	-	-
<b>Capital Total</b>		<b>(881,404)</b>	<b>(2,852,060)</b>	<b>50,000</b>	<b>110,000</b>	<b>110,000</b>
<b>Total Resources</b>		<b>3,562,584</b>	<b>3,840,388</b>	<b>4,304,102</b>	<b>5,346,843</b>	<b>5,396,843</b>

Requirements are listed on the following page.

# SandyNet Fund

REQUIREMENTS						
560-056-511100	Salaries	703,437	744,983	963,000	1,185,000	1,185,000
560-056-511200	Overtime	11,936	9,473	-	20,000	20,000
560-056-521100	Insurance Benefits	151,864	172,365	294,000	336,000	336,000
560-056-521200	FICA Taxes	55,455	57,747	77,000	92,000	92,000
560-056-521300	PERS	138,687	178,223	253,000	332,000	332,000
560-056-521360	Other Benefits	5,533	2,169	-	-	-
560-056-521500	Workers' Benefit Fund	558	449	1,000	800	800
560-056-521600	Unemployment Insurance	722	755	1,000	5,000	5,000
560-056-521700	Paid Leave Oregon Tax	-	-	-	5,000	5,000
560-056-521800	Workers' Comp Insurance	12,071	21,146	33,000	38,000	38,000
560-056-521900	Transit Tax	4,349	4,529	6,000	7,500	7,500
560-056-601100	Supplies	42,258	50,858	50,000	50,000	50,000
560-056-601200	Postage	2,548	1,173	800	800	800
560-056-601300	Printing	-	70	-	150	150
560-056-601400	Copier Charges	98	-	150	-	-
560-056-601401	Branding & Marketing	442	989	-	-	-
560-056-601600	Organizational Fees	150	508	200	-	-
560-056-601800	Books and Subscriptions	1,834	1,055	2,500	2,500	2,500
560-056-601900	Uniforms	1,523	719	3,000	5,000	5,000
560-056-602100	Employee Recruitment	888	98	1,000	2,000	2,000
560-056-602200	Conferences	8,787	3,848	10,000	10,000	10,000
560-056-602300	Training & Professional Advancement	488	5,982	5,000	5,000	5,000
560-056-602500	Meetings & Meals	2,688	1,551	2,000	2,000	2,000
560-056-603100	Mileage Reimbursement	534	-	-	-	-
560-056-603200	Vehicle - Fuel	9,376	8,394	10,000	16,500	16,500
560-056-603500	Vehicle Repair & Maintenance	7,688	4,129	10,000	10,000	10,000
560-056-604100	Repairs & Maintenance	64,085	26,593	50,000	50,000	50,000
560-056-605100	Contractual Services	84,999	110,220	100,000	270,000	320,000
560-056-605350	Contractual Services - Utility Billing	9,076	8,610	9,000	9,000	9,000
560-056-606100	Equipment Rental	2,833	1,733	3,000	3,000	3,000
560-056-606110	Leased Lines	295	-	-	-	-
560-056-606120	Building Rent	14,300	590	-	-	-
560-056-606200	Wireless Customer Equip.	1,867	-	-	-	-
560-056-606210	Internet Access Fees	222,271	164,918	220,010	255,000	255,000
560-056-607100	Utilities	25,117	20,452	20,000	20,000	20,000
560-056-607170	Hosted Voice Charges	69,743	89,472	100,000	100,000	100,000
560-056-609100	Insurance	6,449	6,234	22,500	28,000	28,000
560-056-609200	Advertising	7,380	-	15,000	30,000	30,000
560-056-610200	Fees	9,207	12,585	12,000	5,000	5,000
560-056-628200	Credit Card Merchant Fee	13,111	26,268	30,000	60,000	60,000
560-056-650300	Regulatory Fees	100	10,000	150	5,000	5,000
560-056-740100	Computer Equipment	1,236	178	-	-	-
560-056-740202	FTTH Equipment	5,276	10,481	-	10,000	10,000
560-056-910110	Transfer to General Fund	99,732	112,326	205,662	247,063	247,063
560-056-910670	Transfer to Op Center IS Fund	6,000	-	-	-	-
560-056-950000	Contingency	-	-	62,425	51,819	51,819
<b>Operations Total</b>		<b>1,806,992</b>	<b>1,871,871</b>	<b>2,572,397</b>	<b>3,269,132</b>	<b>3,319,132</b>
560-156-740100	Computer Equipment	8,444	5,716	10,000	12,000	12,000
560-156-740200	Telecom Equipment	183,631	8,050	40,000	160,000	160,000
560-156-740202	FTTH Equipment	233,124	309,802	200,000	300,000	300,000
560-156-740300	Wireless Network	10,013	21,434	25,000	25,000	25,000
560-156-750000	Vehicles	115,562	41,419	20,000	50,000	50,000
560-156-780120	Fiber Project	155,856	179,744	125,000	200,000	200,000
560-156-812100	Loan Principal	172,743	167,754	108,404	30,600	30,600
560-156-812200	Interfund Loan Principal	276,127	198,317	97,974	101,773	101,773
560-156-816005	Revenue Bond Principal	320,000	485,000	575,000	720,000	720,000
560-156-830001	Interfund Loan Interest	20,433	18,623	12,887	9,088	9,088
560-156-832903	Loan Interest	6,343	2,130	190	-	-
560-156-836902	Revenue Bond Interest	571,794	555,650	515,050	467,050	467,050
560-156-870000	Paying Agent Fees	1,000	1,100	2,200	2,200	2,200
<b>Capital Total</b>		<b>2,075,069</b>	<b>1,994,738</b>	<b>1,731,705</b>	<b>2,077,711</b>	<b>2,077,711</b>
<b>Total Requirements</b>		<b>3,882,062</b>	<b>3,866,610</b>	<b>4,304,102</b>	<b>5,346,843</b>	<b>5,396,843</b>

# Operations Center Internal Service Fund

## Fund Overview

The Operations Center Internal Service Fund accounts for all resources and requirements related to the Operations Center building, which houses the Transit, Public Works, and Parks departments. Each fund pays into the internal service fund based of the number of square feet that is occupied by its various users.

## Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>					
Beginning Balance	239	-	-	1,000	1,000
Interest	1,444	7	-	-	-
Grants	-	4,133	-	-	-
Transfers	107,458	122,000	125,000	250,000	250,000
<b>Total Resources</b>	<b>109,140</b>	<b>126,140</b>	<b>125,000</b>	<b>251,000</b>	<b>251,000</b>
<b>REQUIREMENTS</b>					
Materials & Services	109,140	121,104	125,000	151,000	151,000
Capital Outlay	-	4,896	-	100,000	100,000
<b>Total Requirements</b>	<b>109,140</b>	<b>126,000</b>	<b>125,000</b>	<b>251,000</b>	<b>251,000</b>

### BN 23-25 Budget Notes

- Materials & Services reflects all costs associated with the operations center building.
- \$100,000 is being transferred to this fund to cover the costs associated with deferred maintenance of the various buildings on this site, including paint and siding repairs.

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
<b>RESOURCES</b>						
670-000-401000	Beginning Balance	239	-	-	1,000	1,000
670-000-442500	Other Agencies	-	4,133	-	-	-
670-000-471100	Interest	1,444	7	-	-	-
670-000-490024	Transfer from GF City Council	730	885	885	-	-
670-000-490035	Transfer from GF Parks, Building & Grounds	6,554	7,163	7,163	17,300	17,300
670-000-490110	Transfer from GF Police	5,813	8,075	8,075	12,100	12,100
670-000-490240	Transfer from Street Fund	11,455	13,938	13,938	23,900	23,900
670-000-490270	Transfer from Transit Fund	42,541	53,125	53,125	125,000	125,000
670-000-490520	Transfer from Water Fund	11,455	13,938	13,938	23,900	23,900
670-000-490530	Transfer from Sewer Fund	11,455	13,938	13,938	23,900	23,900
670-000-490550	Transfer from Stormwater Fund	11,455	10,938	13,938	23,900	23,900
670-000-490560	Transfer from SandyNet	6,000	-	-	-	-
<b>Total Resources</b>		<b>109,140</b>	<b>126,140</b>	<b>125,000</b>	<b>251,000</b>	<b>251,000</b>
<b>REQUIREMENTS</b>						
670-099-601100	Supplies	5,919	2,036	10,000	9,000	9,000
670-099-604100	Repairs & Maintenance	14,333	13,833	20,000	25,000	25,000
670-099-605100	Contractual Services	18,791	35,065	30,000	50,000	50,000
670-099-607100	Utilities	59,705	56,674	60,000	60,000	60,000
670-099-609100	Insurance	10,392	13,495	5,000	7,000	7,000
670-099-760000	Machinery & Equipment	-	4,896	-	-	-
670-099-770000	Major Repairs & Maintenance	-	-	-	100,000	100,000
<b>Total Resources</b>		<b>109,140</b>	<b>126,000</b>	<b>125,000</b>	<b>251,000</b>	<b>251,000</b>



## Facilities Maintenance Internal Service Fund

### Fund Overview

The Facilities Maintenance Internal Service Fund accounts for repairs, maintenance, and replacement of City owned buildings. Transfers are received from other City funds whose departments are housed in City buildings that are open to the public. Contributions are based on a percentage of the department's budget.

### Budget Summary & Detail

	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
Beginning Balance	220,000	330,000	299,230	395,566	395,566
Transfers	110,000	110,000	110,000	110,000	110,000
<b>Total Resources</b>	<b>330,000</b>	<b>440,000</b>	<b>409,230</b>	<b>505,566</b>	<b>505,566</b>
Materials & Services	-	92,984	250,000	300,000	-
Capital Outlay	-	-	-	-	300,000
Contingency	-	-	159,230	205,566	205,566
<b>Total Requirements</b>	<b>-</b>	<b>92,984</b>	<b>409,230</b>	<b>505,566</b>	<b>505,566</b>

### BN 23-25 Budget Notes

- Materials & Services includes major repairs and maintenance of various City facilities, including new roofs on the Senior Center, Police Department, and HVAC upgrades at the Operations Center.

Account Number	Account Name	BN 17-19 Actual	BN 19-21 Actual	BN 21-23 Budget	BN 23-25 Proposed	BN 23-25 Approved
680-068-401000	Beginning Balance	220,000.00	330,000	299,230	395,566	395,566
680-068-490110	Transfer from General Fund	85,000.00	85,000	85,000	85,000	85,000
680-068-490240	Transfer from Street Fund	3,239.00	3,200	3,200	3,200	3,200
680-068-490270	Transfer from Transit Fund	12,043.00	12,200	12,200	12,200	12,200
680-068-490520	Transfer from Water Fund	3,240.00	3,200	3,200	3,200	3,200
680-068-490530	Transfer from Sewer Fund	3,239.00	3,200	3,200	3,200	3,200
680-068-490550	Transfer from Stormwater Fund	3,239.00	3,200	3,200	3,200	3,200
<b>Total Resources</b>		<b>330,000</b>	<b>440,000</b>	<b>409,230</b>	<b>505,566</b>	<b>505,566</b>
680-068-605100	Contractual Services	-	92,984	250,000	300,000	-
680-068-732000	Improvements	-	-	-	-	300,000
680-068-950000	Contingency	-	-	159,230	205,566	205,566
<b>Total Requirements</b>		<b>-</b>	<b>92,984</b>	<b>409,230</b>	<b>505,566</b>	<b>505,566</b>

# Capital Improvement Projects

## 2023-2025 Budgeted Capital Improvement Projects

The city's budgeted capital improvement projects for the 2023-2025 is listed below. The total for the biennium is approximately \$36.1 million. Capital expenditures are defined as assets with an initial, individual cost of \$5,000 or more, and have a useful life extending beyond a single reporting period.

The five-year capital plan incorporates the capital improvement plans from the City's utility master plans. The Transportation System Plan is still in progress, and efforts will be made to develop a Telecommunications Master Plan over the next two years. The Wastewater System Facilities Plan will be amended this year with anticipated changes to the forecasted project cost and preferred alternatives for the system expansion and new discharge. The five-year Capital Improvement Plan will be updated once the Master Plans are completed.

Five Year Capital Improvement Plan							
Fund	Project	Funding Source	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028
General	Computer equipment	General revenue	32,900	73,000	-	-	-
	Machinery, equipment, and vehicles	General revenue	575,000	325,000	-	-	-
	Infrastructure improvements	General revenue	100,000	-	-	-	-
Street	General street maintenance	Local gas tax	10,000	-	200,000	200,000	200,000
	General street improvements	Local gas tax	70,000	-	100,000	100,000	150,000
	Machinery, equipment, and vehicles	Local gas tax	87,000	-	-	60,000	50,000
	Bell Street / 362nd extension	VRF/gas tax	1,505,000	-	-	-	-
	Dubarko Rd / Highway 211 Improvements	SDC	50,000	100,000	-	-	-
	Gunderson Rd / Highway 211 connection	Developer contribution/SDC	250,000	600,000	1,000,000	500,000	-
Transit	Transportation equipment	Grants/local transit tax	2,000,000	1,245,000	500,000	1,000,000	750,000
	Facility and equipment capacity improvements	Grants/local transit tax	248,486	-	-	-	-
	Maintenance building	Grants/local transit tax	-	-	3,000,000	-	-
	Administration building expansion	Grants/local transit tax	100,000	360,000	3,000,000	4,000,000	-
Parks Capital Projects	Land purchase (tbd)	Payment in lieu of land	-	1,500,000	-	-	-
	Community Campus development	SDC	1,800,000	-	-	-	-
	Deerpoint Park	SDC	-	1,500,000	-	-	-
	Parks and Trails development	SDC	100,000	100,000	-	-	-
Water	System updates and maintenance	Service charges	300,000	450,000	-	-	-
	Portland Pipeline project	Loans/service charges	3,000,000	5,686,000	14,471,000	8,000,000	-
	Aldercreek improvements	Loans/service charges	1,000,000	1,000,000	5,600,000	5,800,000	-
	Equipment and vehicles	Loans/service charges	194,000	-	-	-	-
Wastewater	General system maintenance	Service charges	150,000	150,000	-	-	-
	Equipment and vehicles	Service charges	154,500	-	-	-	-
	Treatment plant improvements/expansion	Loans/bonds/service charges	4,500,000	5,481,564	-	-	-
	Treatment plant - new eastside facility	Loans/bonds/service charges	-	-	9,200,000	37,000,000	33,400,000
	Sandy River outfall	Loans/bonds/service charges	-	-	5,800,000	9,700,000	5,200,000
	Discharge alternatives	Loans/bonds/service charges	-	-	-	-	7,400,000
Stormwater	System updates and maintenance	Service charges	50,000	70,000	100,000	100,000	150,000
	Equipment and vehicles	Loans/service charges	56,000	-	-	-	50,000
SandyNet	Fiber installations and equipment	Service charges	385,000	300,000	250,000	250,000	250,000
	Equipment and vehicles	Service charges	62,000	10,000	-	-	-
Operations Center	Facility repairs (paint, HVAC, etc.)	Transfer from other funds	100,000	-	-	-	-
Facilities Maintenance	Facility repairs (roof repairs, etc.)	Transfer from other funds	120,000	180,000	-	-	-
<b>Total Cost of Capital Improvements Projects</b>			<b>16,999,886</b>	<b>19,130,564</b>	<b>43,221,000</b>	<b>66,710,000</b>	<b>47,600,000</b>

Estimated amounts above for fiscal years 2024 - 2028 are based on today's dollars and are not increased for inflation.

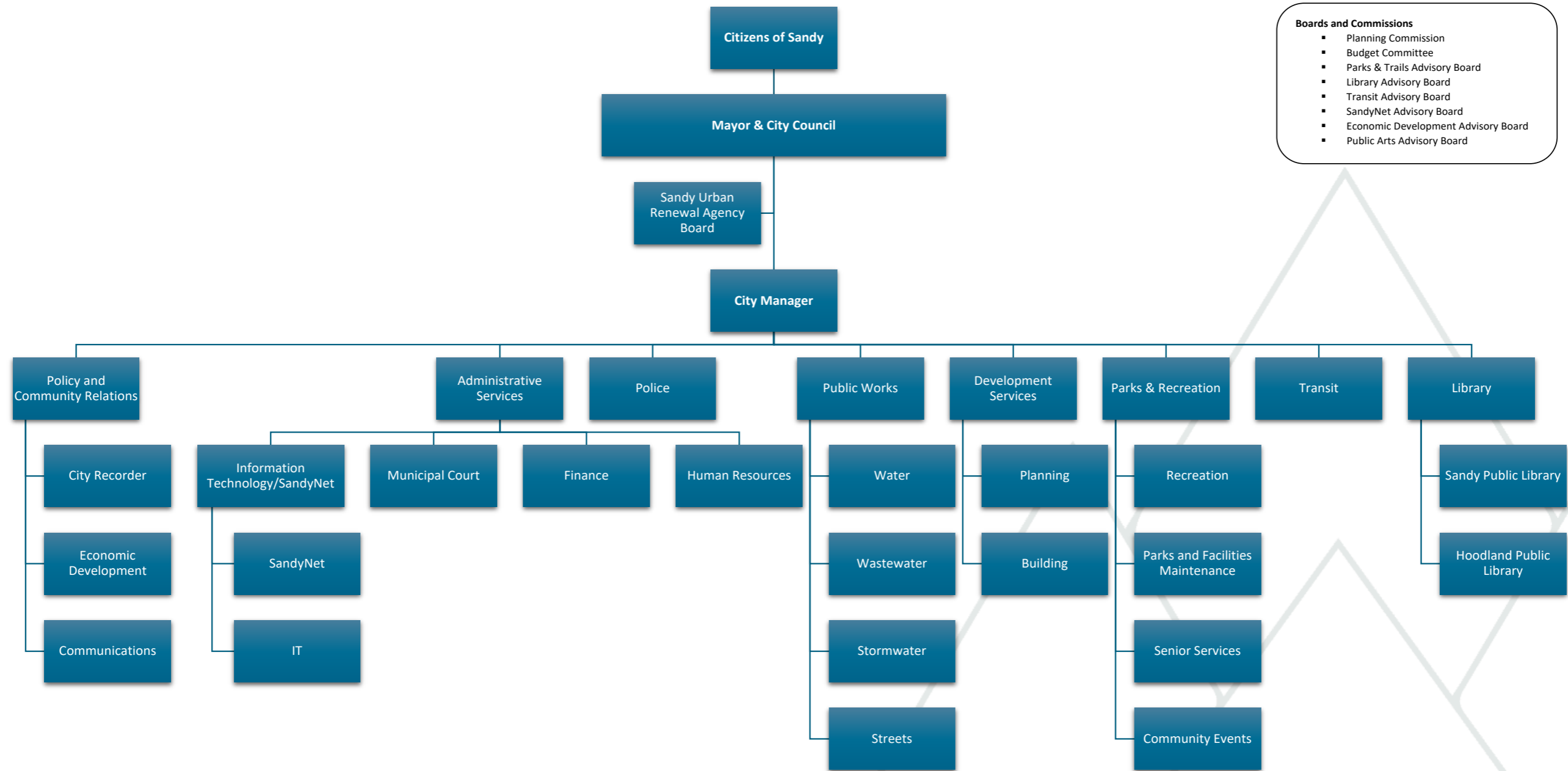
# Appendix

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2023-2025 Approved Budget

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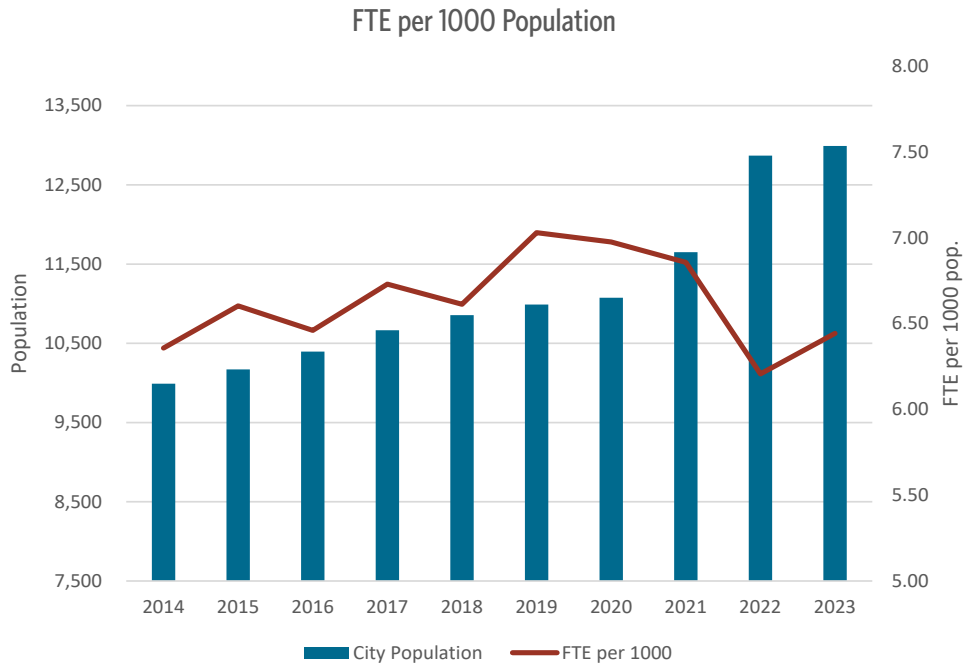
City of Sandy, Oregon



# FTE Summary

The city's total full-time equivalent (FTE) for the 2023-25 biennium is 83.69. A summary of the changes is included on the following page.

	17-19	19-21	21-23	23-25
<b>Total FTE</b>	71.77	77.25	79.87	83.69



## FTE Summary

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### Summary of Changes

The City's total FTE has increased by 3.82 FTE over the prior budget. Changes are identified below:

Full Time Equivalent (FTE) Changes	
Position	BN 23-25 Changes
Associate Planner	(1.00)
Code Enforcement Specialist	1.00
Library Clerks	0.32
Public Works Utility Worker	1.00
Public Works Wastewater Supervisor	1.00
Public Works Project Manager	1.00
Telecom Utility Worker	0.50
<b>Total Changes</b>	<b>3.82</b>

## FTE Summary

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
City Manager	110	25	Administration	0.93	0.90	0.90	0.90
Deputy City Manager/Finance Director	110	25	Administration	-	-	-	0.25
Director of Policy & Community Relations	110	25	Administration	-	-	-	0.90
Assistant to City Manager/City Recorder	110	25	Administration	-	-	0.90	-
Accounting Clerk	110	25	Administration	0.30	0.40	-	-
Permit Technician I	110	25	Administration	0.20	0.10	0.15	-
Planning Assistant	110	25	Administration	-	0.10	-	-
Administrative Assistant	110	25	Administration	-	0.06	0.06	-
Economic Development Manager	110	25	Administration	0.10	-	-	-
<b>Total</b>				<b>1.53</b>	<b>1.56</b>	<b>2.01</b>	<b>2.05</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Court Clerk	110	27	Municipal Court	0.50	0.50	0.50	0.50
Code Enforcement Officer	110	27	Municipal Court	-	0.04	-	-
Accounting Specialist	110	27	Municipal Court	0.10	0.04	0.10	0.03
Utility Specialist	110	27	Municipal Court	0.20	0.05	0.05	0.03
<b>Total</b>				<b>0.80</b>	<b>0.63</b>	<b>0.65</b>	<b>0.56</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Deputy City Manager/Finance Director	110	28	Finance	-	-	0.90	0.65
Finance Director	110	28	Finance	1.00	1.00	-	-
Assistant to City Manager/City Recorder	110	28	Finance	-	-	0.10	-
Human Resources Manager	110	28	Finance	-	1.00	1.00	-
Accountant/HR Analyst	110	28	Finance	1.00	-	-	-
Accounting Specialist	110	28	Finance	0.40	0.40	0.62	0.65
Utility Specialist	110	28	Finance	-	0.15	0.05	-
<b>Total</b>				<b>2.40</b>	<b>2.55</b>	<b>2.67</b>	<b>1.30</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Library Director	110	29	Sandy Library	1.00	1.00	1.00	0.90
Assistant Library Director	110	29	Sandy Library	0.93	1.00	1.00	0.90
Librarian	110	29	Sandy Library	2.60	2.75	2.75	2.78
Library Clerk	110	29	Sandy Library	4.09	3.94	4.65	3.32
Library Assistant	110	29	Sandy Library	3.43	3.83	3.83	2.63
Shelver	110	29	Sandy Library	0.78	0.82	0.10	0.53
Aide	110	29	Sandy Library	1.00	-	-	-
<b>Total</b>				<b>13.82</b>	<b>13.34</b>	<b>13.33</b>	<b>11.05</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Police Chief	110	30	Police	1.00	1.00	1.00	1.00
Lieutenant	110	30	Police	1.00	0.50	1.00	1.00
Sergeant	110	30	Police	2.00	2.00	2.00	2.00
Officer	110	30	Police	12.00	12.00	12.00	12.00
Code Enforcement Officer	110	30	Police	0.94	0.81	0.88	1.00
Office Manager	110	30	Police	1.00	1.00	1.00	1.00
Records Specialist	110	30	Police	2.00	2.00	2.00	2.00
<b>Total</b>				<b>19.94</b>	<b>19.31</b>	<b>19.88</b>	<b>20.00</b>

## FTE Summary

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
HR Director	110	32	Human Resources	-	-	-	1.00
Accounting Specialist	110	32	Human Resources	-	-	-	0.20
<b>Total</b>				-	-	-	<b>1.20</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Parks & Recreation Director	110	33	Recreation	0.40	0.45	0.48	0.33
Senior/Community Center Manager	110	33	Recreation	-	-	-	0.50
Recreation Manager	110	33	Recreation	0.80	1.00	0.95	-
Administrative Assistant	110	33	Recreation	0.50	0.50	0.50	-
Executive Assistant	110	33	Recreation	-	-	-	0.50
Events Coordinator	110	33	Recreation	0.40	0.63	-	-
Recreation Coordinator	110	33	Recreation	-	-	0.90	0.90
Transportation Coordinator	110	33	Recreation	-	-	-	0.25
Summer Program	110	33	Recreation	0.30	0.50	0.50	-
<b>Total</b>				<b>2.40</b>	<b>3.08</b>	<b>3.33</b>	<b>2.48</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Parks & Recreation Director	110	34	Seniors	0.50	0.45	0.48	0.33
Recreation Manager	110	34	Seniors	0.20	-	-	-
Senior/Community Center Manager	110	34	Seniors	-	1.00	1.00	0.50
Client Services Coordinator	110	34	Seniors	1.00	1.00	1.00	1.00
Administrative Assistant	110	34	Seniors	0.50	0.50	0.50	-
Executive Assistant	110	34	Seniors	-	-	-	0.50
Food Services Coordinator	110	34	Seniors	0.58	0.63	0.55	-
Custodian/Driver	110	34	Seniors	0.59	-	-	-
Driver	110	34	Seniors	-	0.50	0.80	-
Transportation Coordinator	110	34	Seniors	-	-	-	0.75
Respite Program Coordinator	110	34	Seniors	0.25	0.20	0.20	-
Recreation Coordinator	110	34	Seniors	-	-	0.10	0.90
Building Monitors	110	34	Seniors	-	0.50	0.33	0.33
<b>Total</b>				<b>3.62</b>	<b>4.78</b>	<b>4.96</b>	<b>4.31</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Parks & Recreation Director	110	35	Parks, Buildings, & Grounds	0.10	0.05	-	0.34
Parks & Facilities Manager	110	35	Parks, Buildings, & Grounds	1.00	1.00	1.00	1.00
Parks Maintenance Worker	110	35	Parks, Buildings, & Grounds	1.00	1.00	1.80	2.00
Maintenance Technician	110	35	Parks, Buildings, & Grounds	-	0.75	-	-
Recreation Coordinator	110	35	Parks, Buildings, & Grounds	-	-	-	0.20
Parks Seasonal	110	35	Parks, Buildings, & Grounds	0.18	0.33	0.33	0.33
Recreation Manager	110	35	Parks, Buildings, & Grounds	-	-	0.05	-
<b>Total</b>				<b>2.28</b>	<b>3.13</b>	<b>3.18</b>	<b>3.87</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Development Services Director	110	36	Planning	0.55	0.50	0.55	0.65
Associate Planner	110	36	Planning	0.60	1.40	0.85	-
Senior Planner	110	36	Planning	-	-	0.75	0.90
Planning Assistant	110	36	Planning	0.38	0.36	-	-
Engineering Technician	110	36	Planning	0.20	0.20	0.10	0.10
Economic Development Manager	110	36	Planning	-	0.05	-	-
Code Enforcement Officer	110	36	Planning	0.03	0.06	0.06	1.00
Permit Technician I	110	36	Planning	-	0.10	0.26	0.23
Administrative Assistant	110	36	Planning	-	0.19	0.19	0.34
<b>Total</b>				<b>1.76</b>	<b>2.86</b>	<b>2.76</b>	<b>3.22</b>



## FTE Summary

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Development Services Director	110	37	Building	0.25	0.25	0.20	0.20
Building Official	110	37	Building	1.00	1.00	1.00	1.00
Associate Planner	110	37	Building	0.30	0.40	0.05	-
Senior Planner	110	37	Building	-	-	0.10	0.10
Permit Technician I	110	37	Building	-	-	0.89	0.65
Permit Technician II	110	37	Building	0.74	0.74	-	-
Planning Assistant	110	37	Building	0.38	0.20	-	-
Code Enforcement Officer	110	37	Building	0.03	0.06	0.03	-
Administrative Assistant	110	37	Building	-	0.38	0.23	0.30
<b>Total</b>				<b>2.70</b>	<b>3.03</b>	<b>2.50</b>	<b>2.25</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Economic Development Manager	110	38	Economic Development	0.80	0.40	0.45	0.40
Development Services Director	110	38	Economic Development	-	0.05	0.05	-
Associate Planner	110	38	Economic Development	-	0.05	-	-
Senior Planner	110	38	Economic Development	-	-	0.05	-
Administrative Assistant	110	38	Economic Development	-	-	0.03	-
<b>Total</b>				<b>0.80</b>	<b>0.50</b>	<b>0.58</b>	<b>0.40</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Intern	110	39	Non-Departmental	0.40	-	-	-
<b>Total</b>				<b>0.40</b>	<b>-</b>	<b>-</b>	<b>-</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
IT Director/SandyNet General Manager	110	40	Information Technology	0.20	0.20	0.20	0.20
Systems Administrator	110	40	Information Technology	1.00	1.00	1.00	1.00
Network Engineer	110	40	Information Technology	0.10	0.10	0.10	0.10
<b>Total</b>				<b>1.30</b>	<b>1.30</b>	<b>1.30</b>	<b>1.30</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Library Director	110	41	Hoodland Library	-	-	-	0.10
Assistant Library Director	110	41	Hoodland Library	-	-	-	0.10
Librarian	110	41	Hoodland Library	-	-	-	0.10
Library Clerk	110	41	Hoodland Library	-	-	-	1.48
Library Assistant	110	41	Hoodland Library	-	-	-	0.88
<b>Total</b>				<b>-</b>	<b>-</b>	<b>-</b>	<b>2.65</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Public Works Director	240	54	Streets	0.31	0.31	0.31	0.31
Assitant Public Works Director/City Engineer	240	54	Streets	-	-	0.31	0.15
Public Works Superintendent	240	54	Streets	-	-	-	0.30
Public Works Crew Leader	240	54	Streets	0.25	0.25	0.25	0.25
Public Works Utility Worker	240	54	Streets	1.49	1.38	1.25	1.00
Collection Specialist	240	54	Streets	-	-	0.13	0.05
Water Specialist	240	54	Streets	-	-	-	0.05
Engineering Technician	240	54	Streets	0.20	0.20	0.23	0.30
Public Works - Seasonal	240	54	Streets	0.25	0.25	0.25	0.33
Transit Administrative Assistant	240	54	Streets	0.05	0.06	0.05	0.10
Administrative Assistant	240	54	Streets	-	-	0.02	0.08
Planning Assistant	240	54	Streets	0.06	0.06	-	-
<b>Total</b>				<b>2.61</b>	<b>2.51</b>	<b>2.79</b>	<b>2.92</b>

## FTE Summary

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Transit Director	270	70	Transit	1.00	1.00	1.00	1.00
Transit Manager	270	70	Transit	-	-	-	-
Transit Program Administrator	270	70	Transit	-	1.00	1.00	1.00
Transit Administrative Assistant	270	70	Transit	0.80	1.00	0.80	0.80
<b>Total</b>				<b>1.80</b>	<b>3.00</b>	<b>2.80</b>	<b>2.80</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Community Services Director	280	0	Aquatic/Recreation	-	0.05	0.05	-
Parks Maintenance Worker	280	0	Aquatic/Recreation	-	-	0.20	-
Maintenance Technician	280	0	Aquatic/Recreation	-	0.25	-	-
<b>Total</b>				<b>-</b>	<b>0.30</b>	<b>0.25</b>	<b>-</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Public Works Director	520	52	Water	0.31	0.31	0.31	0.31
Assitant Public Works Director/City Engineer	520	52	Water	-	-	0.31	0.30
Project Manager	520	52	Water	-	-	-	0.50
Public Works Superintendent	520	52	Water	-	-	-	0.30
Public Works Crew Leader	520	52	Water	0.25	0.25	0.25	0.25
Public Works Utility Worker	520	52	Water	1.49	1.88	1.25	2.00
Collection Specialist	520	52	Water	-	-	0.13	0.05
Water Specialist	520	52	Water	-	-	-	0.85
Engineering Technician	520	52	Water	0.20	0.20	0.23	0.15
Utility Specialist	520	52	Water	0.20	0.20	0.23	0.30
Court Clerk	520	52	Water	0.12	0.12	-	-
Administrative Assistant	520	52	Water	-	-	0.02	0.12
Planning Assistant	520	52	Water	0.06	0.06	-	-
Accounting Specialist	520	52	Water	0.05	0.04	0.07	0.03
Transit Administrative Assistant	520	52	Water	0.05	0.06	0.05	0.10
Permit Technician I	520	52	Water	0.03	0.03	0.08	0.06
<b>Total</b>				<b>2.76</b>	<b>2.65</b>	<b>2.91</b>	<b>5.32</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Public Works Director	530	53	Wastewater	0.31	0.31	0.31	0.31
Assitant Public Works Director/City Engineer	530	53	Wastewater	-	-	0.31	0.40
Project Manager	530	53	Wastewater	-	-	-	0.50
Publis Works Superintendent	530	53	Wastewater	-	-	-	0.30
Public Works Crew Leader	530	53	Wastewater	0.25	0.25	0.25	0.25
Public Works Utility Worker	530	53	Wastewater	1.49	1.88	1.25	2.00
Collection Specialist	530	53	Wastewater	-	-	0.63	0.85
Water Specialist	530	53	Wastewater	-	-	-	0.05
Engineering Technician	530	53	Wastewater	0.20	0.20	0.23	0.15
Utility Specialist	530	53	Wastewater	0.20	0.20	0.23	0.30
Court Clerk	530	53	Wastewater	0.12	0.12	-	-
Administrative Assistant	530	53	Wastewater	-	-	0.02	0.08
Planning Assistant	530	53	Wastewater	0.06	0.06	-	-
Accounting Specialist	530	53	Wastewater	0.05	0.04	0.07	0.03
Transit Administrative Assistant	530	53	Wastewater	0.05	0.06	0.05	-
Permit Technician I	530	53	Wastewater	0.03	0.03	0.08	0.06
<b>Total</b>				<b>2.76</b>	<b>3.15</b>	<b>3.41</b>	<b>5.28</b>

## FTE Summary

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
Public Works Director	550	55	Stormwater	0.07	0.07	0.07	0.07
Assitant Public Works Director/City Engineer	550	55	Stormwater	-	-	0.07	0.15
Public Works Superintendent	550	55	Stormwater	-	-	-	0.10
Public Works Crew Leader	550	55	Stormwater	0.25	0.25	0.25	0.25
Public Works Utility Worker	550	55	Stormwater	0.53	1.38	1.25	1.00
Collection Specialist	550	55	Stormwater	-	-	0.13	0.05
Water Specialist	550	55	Stormwater	-	-	-	0.05
Engineering Technician	550	55	Stormwater	0.20	0.20	0.23	0.30
Utility Specialist	550	55	Stormwater	0.20	0.20	0.23	0.10
Court Clerk	550	55	Stormwater	0.11	0.11	-	-
Administrative Assistant	550	55	Stormwater	-	-	0.02	0.08
Planning Assistant	550	55	Stormwater	0.06	0.06	-	-
Accounting Specialist	550	55	Stormwater	0.05	0.04	0.07	0.03
Transit Administrative Assistant	550	55	Stormwater	0.05	0.06	0.05	-
<b>Total</b>				<b>1.52</b>	<b>2.37</b>	<b>2.35</b>	<b>2.18</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
IT Director/SandyNet General Manager	560	56	SandyNet	0.80	0.80	0.80	0.80
Network Engineer	560	56	SandyNet	-	-	0.90	0.90
Network Technician	560	56	SandyNet	1.00	1.00	1.00	1.00
Systems Developer	560	56	SandyNet	0.90	0.90	-	-
Telecom Crew Leader	560	56	SandyNet	-	-	1.00	1.00
Telecom Utility Worker	560	56	SandyNet	3.00	3.00	3.00	3.50
Utility Specialist	560	56	SandyNet	0.20	0.20	0.23	0.27
Court Clerk	560	56	SandyNet	0.15	0.15	-	-
Accounting Specialist	560	56	SandyNet	0.05	0.04	0.07	0.03
<b>Total</b>				<b>6.10</b>	<b>6.09</b>	<b>7.00</b>	<b>7.50</b>

Title	Fund	Dept	Department Name	17-19	19-21	21-23	23-25
City Manager	720	72	Urban Renewal	0.07	0.10	0.10	0.10
Deputy City Manager/Finance Director	720	72	Urban Renewal	-	-	0.10	0.10
Director of Policy & Community Relations	720	72	Urban Renewal	-	-	-	0.10
Development Services Director	720	72	Urban Renewal	0.20	0.20	0.20	0.15
Associate Planner	720	72	Urban Renewal	0.10	0.15	0.10	-
Senior Planner	720	72	Urban Renewal	-	-	0.10	-
Economic Development Manager	720	72	Urban Renewal	0.10	0.55	0.55	0.60
Administrative Assistant	720	72	Urban Renewal	-	-	0.04	-
Planning Assistant	720	72	Urban Renewal	-	0.10	-	-
Code Enforcement Officer	720	72	Urban Renewal	-	0.03	0.03	-
<b>Total</b>				<b>0.47</b>	<b>1.13</b>	<b>1.22</b>	<b>1.05</b>

<b>Total FTEs</b>				<b>71.77</b>	<b>77.25</b>	<b>79.87</b>	<b>83.69</b>
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# Indirect Service Cost Allocation

		Indirect Service Cost Allocation							
		025	026	028	032	040	067	039	
					Human	Information	Operations		Indirect
Support Service	Admin <sup>1</sup>	Legal <sup>1</sup>	Finance <sup>1</sup>	Resources <sup>1</sup>	Technology <sup>1</sup>	Center <sup>2</sup>	Non-Dept <sup>3</sup>		Total
<b>Direct Services</b>									
024	City Council	4,920	27,664	4,494	3,300	5,432	-	8,820	<b>54,629</b>
027	Municipal Court	3,958	778	3,616	2,655	4,370	-	7,745	<b>23,123</b>
029	Sandy Library	66,461	13,065	60,709	44,582	73,375	-	14,265	<b>272,456</b>
030	Police	142,353	45,655	130,033	95,491	157,163	12,100	30,422	<b>613,217</b>
033	Recreation	21,742	4,274	19,860	14,585	24,004	-	4,660	<b>89,124</b>
034	Seniors	31,044	6,103	28,357	20,824	34,274	-	6,662	<b>127,264</b>
035	Parks Maintenance	21,249	9,652	19,411	14,254	23,460	17,300	4,551	<b>109,878</b>
036	Planning	20,471	48,150	18,699	13,732	22,601	-	42,579	<b>166,231</b>
037	Building	17,047	3,351	15,572	11,435	18,820	-	35,736	<b>101,961</b>
038	Economic Development	4,538	892	4,145	3,044	5,010	-	9,572	<b>27,202</b>
041	Hoodland Library	16,615	3,266	15,177	11,145	18,344	-	3,566	<b>68,114</b>
054	Street Fund	35,432	14,041	32,365	23,768	39,118	23,900	7,476	<b>176,099</b>
070	Transit Fund	46,337	9,109	42,327	31,083	51,157	125,000	9,739	<b>314,751</b>
000	Aquatic/Rec Center Fund	3,076	605	2,810	2,063	3,396	-	649	<b>12,599</b>
052	Water Fund	42,555	15,441	38,872	28,546	46,982	23,900	8,959	<b>205,254</b>
053	Wastewater Fund	72,619	21,351	66,335	48,713	80,174	23,900	15,219	<b>328,312</b>
055	Stormwater Fund	16,713	10,361	15,266	11,211	18,451	23,900	3,573	<b>99,475</b>
056	SandyNet Fund	59,995	13,025	54,803	40,245	66,236	-	12,760	<b>247,063</b>
072	Urban Renewal Agency Fund	8,757	3,217	7,999	5,874	9,668	-	18,048	<b>53,563</b>
<b>Totals</b>		<b>635,881</b>	<b>250,000</b>	<b>580,850</b>	<b>426,550</b>	<b>702,034</b>	<b>250,000</b>	<b>245,000</b>	<b>3,090,315</b>

NOTES:

- 1 Allocated based on a combination of staff and operating budget of direct service programs.
- 2 Operation Center costs allocated based on square footage used by various departments, adjusted for administrative oversight.
- 3 Half of all City Hall costs (utilities, etc.) allocated only to departments in City Hall; half allocated to all direct service programs.

# Financial Policies

## CAPITAL ASSETS POLICY

This policy provides guidelines to ensure that items are capitalized and depreciated in a consistent manner and adheres to the Generally Accepted Accounting Principles. The prime purpose is to maintain physical accountability over the assets owned by the City.

1. This policy applies to all Departments of the City of Sandy.
2. Capital assets are assets that 1) are used in operations and 2) have an initial useful life more than one (1) year.
3. *a. Purchases:* An original unit cost greater than or equal to \$5,000, including ancillary costs necessary to place the asset into its intended location and condition of use.  
*b. Leases:* An original unit cost greater than or equal to \$25,000, including ancillary costs necessary to place the asset into its intended location and condition of use.
4. Assets acquired for sale or investment do not qualify as capital assets.
5. All assets are recorded at historical cost as of the date acquired or put in operational use.
6. Repair and maintenance are costs incurred to keep an asset in its normal operating condition and the life of the asset is not exceeded.
7. Asset Classes:
  - i. Land
  - ii. Buildings
  - iii. Improvements
  - iv. Infrastructure
  - v. Vehicles
  - vi. Furniture and equipment
  - vii. Other capital assets (intangible)
  - viii. Construction in progress
8. Depreciation Method: The City will utilize the straight-line method for depreciation. Equal periodic depreciation charge is therefore recognized over the life of the capital asset.
9. Useful Life: The Finance Department will use the estimated useful life of assets as follows:

• Land	N/A
• Buildings	40 years
• Improvements	7 - 20 years
• Infrastructure	10 - 50 years
• Vehicles	5 - 10 years
• Furniture and equipment	5 - 20 years
• Other capital assets (intangible)	5 - 10 years
• Construction in progress	N/A

## FUND BALANCE POLICY

In accordance with GASB 54, balances within funds are categorized as follows:

1. Non-spendable: A portion of net resources that cannot be spent because of their form and/or cannot be spent because they must be maintained intact.
2. Restricted: Limitations imposed by creditors, grantors, contributors, or laws and regulations of other governments. Limitations may also be imposed by law through constitutional provisions or enabling legislation.

## Financial Policies

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3. Committed: Limitation imposed at the highest level of decision making that required formal action at the same level to remove.
4. Assigned: City Council has designated decision making authority to some other body designated for that purpose or by official designated for that purpose. Less formality is necessary in the case of assigned fund balance.
5. Unassigned: For the general fund, this classification represents fund balance that has not been assigned to other funds and that has not been restricted, committed, or assigned to specific purposes within the general fund. The general fund should be the only fund that reports a positive unassigned fund balance amount. The total fund balance in the general fund in excess of other categories is known as surplus. In other funds, if expenditures incurred for specific purposes exceed the amounts restricted, committed, or assigned to those purposes, it may be necessary to report a negative unassigned fund balance, or deficit.
6. Order of spending resources: When both restricted and unrestricted resources are available for use, it is the City's policy to use restricted resources first, then unrestricted resources (committed, assigned, and unassigned) as they are needed. When unrestricted resources are available for use it is the City's policy to use committed resources first, then assigned, and then unassigned as they are needed.

### GENERAL FUND RESERVE POLICY

The General Fund shall have a reserve balance of at least five percent (5%) of operations. This reserve will be accounted for in the Non-Departmental departmental. The intent of this reserve is to:

1. Retain adequate reserves for operational purposes for a period of two months, and
2. Generate interest income; and
3. Reduce the need for any short-term borrowing.

### INVESTMENT POLICY

1. City of Sandy's funds will be invested in accordance with the provisions of, but not limited to, all current and future applicable Oregon Statutes. The City will conform to all federal, state, and other legal requirements.
2. City of Sandy's invest objectives are as follows:
  - i. Preservation of capital and protection of investment principal by mitigating credit risk and interest rate risk.
  - ii. Maintenance of sufficient liquidity to meet operating requirements that are reasonably anticipated by structuring the portfolio so that securities mature concurrent with cash needs to meet anticipated demands.
  - iii. Diversification to avoid incurring unreasonable risks regarding specific security types or individual financial institutions.
  - iv. Attainment of a market value rate of return throughout budgetary and economic cycles.

## Glossary

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**Accrual basis** - A method of timing in the recognition of transactions and events. Please see Modified accrual basis for the alternative method. Accrual basis records revenue when earned and expenses as soon as a liability is incurred.

**ACFR** - The Annual Comprehensive Financial Report, the audited report of the City's finances for any given fiscal year.

**Adopted Budget** - The final budget appropriations approved by the City Council, which becomes the budget of the City.

**Approved Budget** - The budget recommended by the Budget Committee for adoption by the City Council.

**Appropriation** - Authorization to spend a specific amount of money. The City Council gives appropriation authority by adopting the budget.

**Assessed value** - The value set on real and personal property as a basis for imposing taxes. Assessed values are determined by Clackamas County.

**Audit** - An official inspection of an organization's accounts by an independent body.

**Balanced Budget** - A budget in which total revenues are equal to expenditures.

**Biennial** - A time frame of two years. This is the length of time that the City budgets for, which includes two fiscal years.

**Budget** - A plan of financial operation embodying an estimate of proposed expenditures for a given purpose and/or period. The budget is the financial plan of the City's allocations of the resources to provide services, and to accomplish the City's objectives.

**Budget Calendar** - Key dates or events which a government follows in the preparation and adoption of the budget.

**Budget Committee** - A committee required by Oregon Local Budget Law (ORS 294.305) which must recommend a budget and approve the maximum tax levy.

**Budget Message** - A written explanation of the budget and the City's financial priorities presented to the Budget Committee by the City Manager, which is required by Oregon Local Budget Law, ORS 294.

**Budget Officer** - The City Manager or other person appointed by the City Council to prepare the proposed budget. This designation is required by Oregon Local Budget Law (ORS 294.305)

**Capital Lease** - Lease of a capital asset. The lease may or may not result in the City's ownership of the item at the end of the lease term.

**Capital Assets** - Items which have a useful life of at least one year and a cost of \$5,000 or more. These include land, infrastructure, buildings, improvements other than buildings, vehicles, and certain furniture and equipment.

**Capital Improvement Plan (CIP)** - A schedule of planned capital projects and their costs, for three or more years.

**Capital Outlay** - Expenditures for capital assets. Includes all purchased capital assets. Expenditures for constructed capital projects appear in capital outlay, materials and services, and reimbursements, depending on the nature of the expenditure.

**Capital Projects** - Projects which purchase or construct capital assets. Typically, a capital project encompasses a purchase of land and/or the construction of a building or facility.

**Contingency** - An amount appropriated in anticipation that some operating expenditures will become necessary which cannot be foreseen and planned in the budget.

## Glossary

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**Debt Service** - Principal and interest payments on long-term debt.

**Department** - Units within a division consisting of one or more.

**Depreciation** - A reduction in the value of an asset with the passage of time.

**Enterprise Fund** - A fund that accounts for operations that are financed and operated in a manner similar to private business enterprises. They are usually self-supporting. The City's enterprise funds are the Water, Sewer, Stormwater and Telecommunications funds.

**Fiscal Year** - A twelve-month period which runs from July 1 through June 30.

**Franchise Fee** - Fees charged to utilities for the use of public right-of-way. Examples include electricity and natural gas.

**FTE** - Full-Time Equivalent - A part-time position converted to the decimal equivalent of a fulltime position based on 2,080 hours per year.

**Fund** - A fiscal and accounting entity, segregating resources for the purpose of carrying on specific activities in accordance with legal restrictions.

**Fund Balance** - The amount of available, spendable, financial resources in any given fund at a specified date.

**GASB** - The Governmental Accounting Standards Board, the body that defines generally accepted accounting principles for governments.

**General Fund** - The City's primary operating fund. There are no restrictions as to the purpose in which the revenues in this fund can be used.

**Goal** - A statement of direction, purpose or intent based on the needs of the community, generally to be completed in a specified amount of time.

**Governmental Fund** - A fund that accounts for operations that are financed and operated

through tax supported activities, for example, property taxes and franchise fees. The City's governmental funds include the General, Street, and Transit funds.

**Grant** - A donation or contribution by one government unit or organization to another. This is usually made to aid a specified purpose.

**Infrastructure** - Infrastructure are assets that are immovable and of value only to the City. It includes roads, curbs and gutters, sidewalks, drainage systems, and water and sewer systems.

**Interfund Loan** - A loan made by one fund to another and authorized by the City Council.

**Materials and Services** - Expendable items purchased for delivery of services. This includes supplies, repairs, maintenance, and replacement parts that are not of capital nature.

**Modified Accrual** - A method of timing in the recognition of transactions and events. Please see Accrual basis for the alternative method. Modified accrual basis records revenue when earned, if they are collectible within the period or soon enough afterwards to be used to pay liabilities of the period. Expenditures are recorded when a liability is incurred except that debt service payments and other specific accrued liabilities are recognized only when payment is due.

**Operating Budget** - Sources and uses necessary for day-to-day operations.

**Ordinance** - A formal legislative enactment by the governing body of a municipality. If it is not in conflict with any higher form of law, such as a state statute or constitutional provision, it has the full force and effect of law within the boundaries of the municipality to which it applies.

**ORS** - Oregon Revised Statutes, laws of the State of Oregon.



## Glossary

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**Performance Measure** - Data collected to determine how effective or efficient a program is in achieving its objectives.

**PERS** - Acronym for Public Employees Retirement System. A State of Oregon defined benefit pension plan to which both employees and employer contribute.

**Personnel Services** - Expenditures for payroll, payroll taxes, and employee benefits.

**Project** - Projects are distinct, with a definable result, process, and beginning and end. Projects are capital or operating.

**Property Tax Levy** - Based upon the assessed value of property and is used as the source of monies to pay general obligation debts and to support the general fund.

**Proprietary Fund** - See "Enterprise Fund" above.

**Reserved for Future Use** - An amount budgeted, but not appropriated, that is not anticipated to be spent in the fiscal year, but rather carried forward into future fiscal years.

**Resolution** - An action by the governing body which requires less formality and has a lower legal status than an ordinance.

**Resources** - Financial resources that are or will be available for expenditure during the fiscal year.

**Revenue** - The gross receipts and receivables that the City receives such as: tax payments, licenses, fines and forfeitures, grants and interest income.

**System Development Charges (SDC)** - Fees charged upon issuance of building permits to offset the cost of infrastructure improvements that are or will be required to provide capacity to serve the development. SDC's are charged for parks, water, sewer, storm, and streets.

**Supplemental Budget** - Appropriations established to meet the needs not anticipated at the time the budget was adopted.

**Transfers** - Amounts moved from one fund to finance activities in another fund, with no requirement of repayment.

**Unrestricted Revenue** - Revenue that may be used for any legitimate City purpose. See "Financial Policies."

**URA** - The City of Sandy Urban Renewal Agency. The Agency is a municipal corporation distinct from the City. The Sandy City Council serves as the Board of Directors for the URA, as well as a member of the Sandy Area Chamber of Commerce and the Sandy Fire District. Its' budget may be obtained from the City of Sandy.

**User Fees** - Fees charged for services to a person who directly benefits from the service.

**Uses** - The ways in which financial resources will be used during the fiscal year.



NO. 2023-21

**A RESOLUTION DECLARING THE CITY OF SANDY'S ELECTION TO RECEIVE STATE REVENUES**

**Whereas,** The City of Sandy Resolves as Follows:

**Section 1.** Pursuant to ORS 221.770, the City hereby elects to receive state revenues for fiscal year 2022-2023.

This resolution is adopted by the Common Council of the City of Sandy and approved by the Mayor this 05 day of June 2023

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Stan Pulliam, Mayor

ATTEST:

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Jeff Aprati, City Recorder

I certify that a public hearing before the Budget Committee was held on April 20, April 27, May 4, and May 11, 2021 and a public hearing before the City Council was held on June 5, 2023 for the 2023 - 20235 biennium, giving citizens an opportunity to comment on the use of State Revenue Sharing.

#2023-21



NO. 2023-22

**A RESOLUTION ADOPTING THE BIENNIUM 2023 - 25 BUDGET, MAKING APPROPRIATIONS, AND LEVYING TAXES**

**Whereas**, the City of Sandy desires to adopt a budget for the biennial period July 1, 2023 to June 30, 2025, make appropriations, and levy property taxes, as required by ORS Chapter 294.

**NOW, THEREFORE, BE IT RESOLVED** by the City Council of the City of Sandy that:

Section 1. The City Council hereby adopts the budget for the biennium 2023 - 2025 in the sum of \$127,654,710. The budget is now on file at the Finance Department, City Hall, Sandy, OR.

Section 2. The amounts listed below are hereby appropriated for the biennium beginning July 1, 2023 for the purposes stated.

<b>GENERAL FUND</b>		
	Mayor & Council	\$ 631,377
	Administration	867,200
	Legal	262,000
	Municipal Court	162,000
	Finance	596,000
	Sandy Library	3,373,841
	Police	8,472,908
	Human Resources	426,550
	Parks & Recreation	4,280,070
	Planning	1,421,043
	Building	1,115,203
	Economic Development	299,204
	Non-Departmental	3,523,223
	Information Technology	782,050
	Hoodland Library	714,633
	General Revenue Transfers	12,463,000
	<b>Total Appropriations</b>	<b>\$ 39,390,302</b>
<b>SPECIAL REVENUE FUNDS</b>		
	Street Fund	

#2023-22

	Operations	\$ 3,389,499
	Capital	3,819,913
	<b>Total Appropriations</b>	<b>\$ 7,206,412</b>
	<u>Transit Fund</u>	
	Operations	\$ 7,166,127
	Capital	3,953,486
	<b>Total Appropriations</b>	<b>\$ 11,119,613</b>
	<u>Aquatic/Recreation Fund</u>	
	Operations	\$ 158,000
	<b>Total Appropriations</b>	<b>\$ 158,000</b>
<b>CAPITAL PROJECTS FUND</b>		
	<u>Parks Capital</u>	
	Land	\$ 1,646,957
	SDC	3,582,681
	<b>Total Appropriations</b>	<b>\$ 5,229,638</b>
<b>DEBT SERVICE FUND</b>		
	<u>Full Faith &amp; Credit Fund</u>	
	Debt Service	\$ 1,775,634
	<b>Total Appropriations</b>	<b>\$ 1,775,634</b>
<b>ENTERPRISE FUNDS</b>		
	<u>Water Fund</u>	
	Operations	\$ 5,572,751
	Capital	18,582,861
	<b>Total Appropriations</b>	<b>\$ 24,155,615</b>
	<u>Wastewater Fund</u>	
	Operations	\$ 8,448,915
	Capital	12,482,169
	WWSI Project	9,981,564
	<b>Total Appropriations</b>	<b>\$ 30,912,645</b>
	<u>Stormwater Fund</u>	
	Operations	\$ 1,137,685
	Capital	415,757

#2023-22

	<b>Total Appropriations</b>	<b>\$ 1,553,442</b>
	<u>SandyNet Fund</u>	
	Operations	\$ 3,319,132
	Capital	2,077,711
	<b>Total Appropriations</b>	<b>\$ 5,396,843</b>
<b>INTERNAL SERVICE FUNDS</b>		
	<u>Operations Center</u>	
	Materials & Services	\$ 251,000
	<b>Total Appropriations</b>	<b>\$ 251,000</b>
	<u>Facilities Maintenance</u>	
	Capital Outlay	\$ 300,000
	Contingency	205,566
	<b>Total Appropriations</b>	<b>\$ 409,230</b>
<b>SUMMARY OF ALL FUNDS</b>		
	Total Appropriations	\$ 127,654,710
	<b>Total Biennial Budget 21-23</b>	<b>\$ 127,654,710</b>

Section 3. **Imposing the Tax:** The City Council hereby imposes the taxes provided for in the biennium 2023 - 2025 adopted budget at the rate of \$4.1152 per \$1,000 of assessed value as the permanent tax rate.

Section 4. **Categorizing the Tax:** The taxes imposed are hereby categorized for purposes of Article XI section 11b as General Government Limitation of a permanent tax rate of \$4.1152/\$1,000.

This resolution is adopted by the Common Council of the City of Sandy and approved by the Mayor this 05 day of June 2023

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Stan Pulliam, Mayor

ATTEST:

#2023-22

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Jeff Aprati, City Recorder

#2023-22

## City of Sandy Press Release

June 1, 2023

# City Announces Negotiation of Consent Decree Settlement; Path Forward on Wastewater Program

The City of Sandy has invested tens of millions of dollars in recent years to ensure Sandy's infrastructure needs are sustainably met, providing a solid foundation from which our community



can work together to achieve our future goals and aspirations. It is in this spirit that **the City of Sandy is announcing the completion of negotiations on a settlement** with the Department of Environmental Quality (DEQ) and Environmental Protection Agency (EPA) that will resolve past violations and fines related to Sandy's permit to discharge treated wastewater to Tickle Creek. While the City has made historic investments to upgrade and modernize our wastewater system under a program named Sandy Clean Waters, past violations incurred prior to the accomplishments of Sandy Clean Waters have remained unresolved. **This negotiated Consent Decree**, which the City Council will consider approving at [its meeting on June 5, 2023](#), **will resolve all past claims DEQ and EPA have against the City, allowing Sandy to move forward with certainty and a clear path into the future.**

The Consent Decree reduces Sandy's civil penalty liability by orders of magnitude. Instead of a maximum possible civil penalty of well over \$100 million for the violations incurred in the years prior to Sandy Clean Waters, and rather than a settlement payment of \$15 million that would typically apply to a city in our situation, **Sandy will pay only \$324,300** in penalties. This drastically lower amount is based on the substantial efforts the City has made in recent years, and that we continue to make in good faith, to reinvest in the wastewater system and protect local watersheds.

## **Future of Wastewater System Improvement Program**

In addition to the terms above, the Consent Decree largely formalizes actions the City is already taking, or plans to take in the near future, to modernize and expand our wastewater system to support our growing community in the future:

- Repairs to the wastewater collection pipes to prevent groundwater inflow and infiltration (I&I)
- Repairs to the existing wastewater treatment plant
- Construction of new wastewater treatment infrastructure as identified in an amended Wastewater System Facilities Plan (currently being developed)
- Completion of a stress test, collection system modeling, and comprehensive capacity analysis of the wastewater system
- Compliance with a Capacity Assurance Program (CAP) that limits new wastewater connections, to ensure the system continues to operate within its capacity limits as new improvements are constructed
- Implementation of an asset management program for the wastewater system known as a Capacity, Management, Operation, and Maintenance program (CMOM), that will allow us to better manage, operate, and maintain our infrastructure and investigate and respond to problems
- Completion of a \$200,000 Supplemental Environmental Project that will improve riparian health and water quality protection along Tickle Creek between 362nd Ave and Hwy 211

## **Limiting New Wastewater Connections to Stay Within System Capacity**

As many community members are aware, the City made the decision to stop accepting new land use applications that propose new wastewater system connections in October 2022, using a mechanism in state law referred to as a moratorium. We said at the time that we were taking the action “in coordination with DEQ and EPA as part of ongoing enforcement proceedings under the Clean Water Act.” We are now able to clarify that **the decision to limit new wastewater connections was an important step in arriving at the Consent Decree settlement with DEQ and EPA.** The reason for



limiting connections is to ensure that new units and demands on the wastewater system do not exceed the system's capacity as we continue to construct improvements. The Consent Decree establishes a Capacity Assurance Program (CAP) limit on new wastewater connections; Sandy is able to use tools like the moratorium to ensure continuing compliance with the CAP and ongoing sufficient capacity in the wastewater system.

Notwithstanding the limits on new connections, there is still new construction occurring in Sandy; that is because while no new wastewater connection applications are being accepted at this time, there are still properties that submitted land use applications prior to the moratorium taking effect. These properties with "vested rights" may connect during the moratorium period, provided the number of new units remains within the established capacity of the system. At its outset, the Consent Decree authorizes the City to add 300 new equivalent residential units (ERUs); the City plans to revise the current moratorium (which had a lower limit of 120 ERUs) in the very near future to reflect this higher allowance. Going forward, the results of the wastewater system stress test (currently in the data analysis phase) will determine Sandy's CAP limit, though this number may be increased over time as more system capacity is demonstrated.

### **Next Steps**

After City Council's approval, the final step in this process would be for Oregon's U.S. District Court to officially enter the decree after a 30 day public comment period.

As stated above, the Council plans to act in the very near future to raise the limit of the wastewater connection moratorium to reflect the higher allowance included in the Consent Decree.



## Staff Report

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**Meeting Date:** June 5, 2023

**From** Josh Soper, City Attorney  
EPA/DEQ Consent Decree Settlement and Sandy Clean Waters

**SUBJECT:** Update

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### **DECISION TO BE MADE:**

Whether to approve a negotiated consent decree with the Oregon Department of Environmental Quality (DEQ) and the U.S. Environmental Protection Agency (EPA) to resolve liability for past violations related to Sandy's permit to discharge treated wastewater to Tickle Creek.

### **BACKGROUND / CONTEXT:**

Through the Sandy Clean Water program, the City has made tremendous progress in addressing the challenges it has experienced with its wastewater treatment system, and we anticipate that our efforts have gone a long way toward achieving consistent permit compliance. However, the City still faces enforcement proceedings from the Oregon Department of Environmental Quality (DEQ) and the U.S. Environmental Protection Agency (EPA) in connection with past permit violations. As a result, City staff, Leeway Engineering, and the City's attorneys at Beery, Elsner & Hammond have been working to negotiate a settlement agreement with EPA and DEQ to resolve those violations and associated penalties. The settlement agreement, known as a consent decree, is now ready for City Council review. If approved by City Council, it would then be signed by all parties and submitted to court for a public comment period and final approval.

### **SANDY CLEAN WATERS PROGRAM STATUS UPDATE**

The Sandy Clean Waters program includes the following:

- Phase 1A (existing treatment plant improvements and collection system I&I reduction):
  - Completed work
    - I&I reduction work in sewer Basins 2 and 8
    - Wastewater Treatment Plant (WWTP) improvements
      - Guaranteed Maximum Price (GMP) 1 work
      - Guaranteed Maximum Price (GMP) 2 work
  - Ongoing Work
    - I&I reduction work in sewer Basins 6 and 7
      - Construction work is anticipated to be completed by June 2023
    - WWTP Improvement GMP-3 (final phase) by August 2023

- NPDES permit application for Sandy River discharge submitted to DEQ
    - Awaiting DEQ response and comments
    - Continued development of needed studies
  - Recalibration of the collection system model to reproject flows to the WWTP, anticipated completed by July 2023
  - Stress Testing of the WWTP to “rerate” the treatment capacity of the plant, completion by August 2023
  - Operations Consultant (Waterdude) to provide assistance with operations, asset inventory, and recommendations for future maintenance and repairs
- Phase 1B (expanded treatment/new or alternative discharge/capacity increase):
  - Ongoing work
    - Underway with an update/amendment to the 2019 Facility Plan. This work will investigate alternatives and identify a realistic and affordable path forward for the mid- and long-term investments needed for our wastewater system (such as additional holding ponds, expansion at the existing treatment plant, additional recycled water agreements, subsurface infiltration, Sandy River outfall and pipeline, Deep Creek, etc.). Initial recommendations anticipated for late 2023, dependent on the results of the stress test and collection system modeling.
    - Apply for WIFIA Loan to close on a master loan agreement at the maximum affordability amount, anticipated for late Fall 2023.
    - Execute an approved Clean Water SRF Loan for Phase 1B to fund next phase of WWTP improvements.

As Council knows, one of the primary types of recurring permit violations the City has experienced were those caused by the City’s wastewater system being overwhelmed by heavy flows at the WWTP. Staff is excited to report that the WWTP made it through this past winter without any “bypasses.” The last bypass was in June 2022, when the peak flow rate exceeded 7 million gallons per day (MGD). Through this past winter, the peak flow rate only reached 4 MGD, which Staff believes is largely due to the investments made in the collection system to reduce I/I.

There have been several other types of permit violations since June 2022 that are mostly attributed to the construction at the WWTP and the change to new operating procedures resulting from the WWTP upgrades. However, additional work will still be required to keep the WWTP operating in a reliable fashion; these additional improvements will be designed and constructed in Phase 1B.

The treated water from the WWTP is now being discharged to Iseli Nursey, per the terms of the City’s permit with DEQ.

Staff is working diligently to conclude the stress testing analysis and comprehensive capacity evaluation by August 2023 and develop a report that demonstrates additional capacity for EPA by Fall 2023.

## **KEY CONSIDERATIONS / ANALYSIS:**

### CONSENT DECREE TERMS

Key terms of the Consent Decree are summarized as follows:

- City to pay a \$250,000 civil penalty to the federal government.
- City to pay a \$24,300 penalty to DEQ.
- City has an additional \$250,000 penalty payable to the State of Oregon, but it is mitigated to \$50,000 contingent on the City completing a “supplemental environmental project,” which is discussed more below and described in detail in Exhibit C of the consent decree.
- Within 180 days, City must submit to EPA/DEQ a Capacity, Management, Operation, and Maintenance (“CMOM”) Program for the City’s Wastewater Collection and Transmission System. City also required to implement this program after approval.
- City to complete six sewer collection system investigations of remaining basins by the end of 2025 and complete all identified corrective measures within 10 years.
- City must complete construction and begin operation of improvements detailed in the 2020-2023 Wastewater Improvements by October 31, 2023.
- City must complete stress testing of the wastewater treatment plant by June 30, 2023 (note that the results of the test will not be completed and approved until some time later; this is a very involved process).
- City must develop and get EPA/DEQ approval of an Amended Wastewater Facility Plan to bring the City into compliance with the terms and conditions of the NPDES Permit. The schedule for final completion of all work under the Amended Wastewater Facility Plan cannot be longer than 15 years.
- City must establish and comply with a Capacity Assurance Program (“CAP”) as follows:
  - Limits new connections to the wastewater system and changes to existing connections that increase flows.
  - City limited to 300 equivalent residential units (ERUs—a measure of flow equal to that typically generated by a single family detached dwelling) of new connections or increased flows during “Period 1” (before the results of the stress test are approved).
  - City limited to however many ERUs the stress test results support during “Period 2” (after the stress test results are approved).
  - Period 2 remains in effect until the City has completed improvements providing capacity for 10 years of anticipated population growth.
  - In the interim (before the 10 years of capacity can be shown), the City can increase the ERU cap during Period 2 by demonstrating to EPA/DEQ that additional capacity has been made available.

- City required to take any actions necessary to accomplish the above including enacting a development moratorium.
- City required to submit twice-annual reports to EPA/DEQ, which summarize compliance with requirements of the consent decree and provide status updates
- City takes on additional administrative and engineering duties for evaluation of each ERU/development's impact to the system including collection and capacity system modeling
- City agrees to certain stipulated penalties for future violations and for missing deadlines of project or reporting completion milestones
- The Consent Decree resolves all claims EPA/DEQ has filed against the City and the associated potential fines
- The Consent Decree remains in effect until the City has completed all requirements of the Consent Decree and remained in compliance for 3 years thereafter

Negotiations with EPA/DEQ regarding the terms of the consent decree focused on a few primary areas of particular importance to the City:

- **Connections During Period 1 of the CAP** – Staff negotiated an allowance for new connections and increased flows from existing connections during Period 1, which is the time period prior to the results of the stress test, and continued to negotiate to ensure the number of ERUs allowed was sufficient to avoid unnecessary negative impacts on developments already in the City's "pipeline."
- **Duration of CAP** – EPA/DEQ proposed that the CAP would be in place for the entire duration of the consent decree, which could be over two decades. After negotiations, EPA/DEQ agreed that the CAP would end when the City is able to demonstrate system capacity for ten years of anticipated population growth.
- **Extra Safety Factor for Calculating Limit During Period 2 of the CAP** – EPA/DEQ initially proposed a formula for calculating the ERU limit during Period 2 of the CAP (based on the results of the stress test) that included multiple layers of safety factors / buffers, which would have the effect of reducing the number of new connections and additional flows through existing connections that would be allowed. As a result of negotiations, EPA/DEQ agreed to remove the safety factor City staff believed was excessive and unnecessary, which means more connections will be allowed and the ERU cap will more accurately reflect the actual capacity of the City's system.
- **Stress Test Procedure** – Through negotiations, EPA/DEQ agreed to a modified plan that was more achievable and cost-effective, and which took into consideration the ongoing construction work at the WWTP and the reduced wet-weather flows with the reduction of I/I in the collection system.
- **Amended Facility Plan** – EPA/DEQ has agreed that the previous 2019 Facility Plan recommendation of a Satellite Treatment Facility is now unaffordable, and that an amended plan (ongoing effort) can be used to determine the next recommended improvement project. EPA/DEQ initially proposed that any new recommendation be fully constructed and operational in 10 years but Staff negotiated an extended timeframe of 15 years, allowing the City some additional breathing room both in terms of schedule and financing of the project.

- **Reasonable Deadlines** – While the City is moving at unprecedented speed to address the issues with its wastewater system, a number of the originally proposed deadlines for actions required by the consent decree would have been extremely challenging to meet and would require tremendous resources that would cost the City in additional consultant fees and contractor change orders. The City was able to negotiate either extensions or even removal of certain interim deadlines, although of course the City still plans to move as quickly as is reasonably possible.
- **Penalties** – Under EPA settlement guidelines, the penalty amount the City would typically be required to pay under a consent decree would be in the range of \$12-15 million, which is several orders of magnitude less than the City could have paid without a settlement agreement. As a result of the City's good faith efforts to address the underlying issues with its wastewater system during negotiations, the total penalty amount in the consent decree is instead reduced to \$524,300. Furthermore, DEQ has agreed that 80% of the \$250,000 state civil penalty can be used toward a Supplementary Environmental Project (SEP). The City has received approval to use these funds for a project that will enhance local environmental corridors in cooperation with the Clackamas River Basin Council.

Finally, it should be noted that the 300 ERUs of new connections or additional flow through existing connections allowed under Period 1 of the CAP is greater than the 120 ERUs allowed under the City's current development moratorium. If the consent decree is approved, staff anticipates recommending Council adoption of a resolution aligning the terms of the development moratorium with the consent decree at an upcoming City Council meeting.

**RECOMMENDATION:**

Staff recommends Council approval of the consent decree. After an extensive negotiation process, staff believes that the consent decree represents the best settlement terms the City could reasonably hope to achieve.

**SUGGESTED MOTION LANGUAGE:**

"I move to approve the negotiated consent decree with the United States Environmental Protection Agency and the Oregon Department of Environmental Quality, as provided in the agenda packet."

**LIST OF ATTACHMENTS/EXHIBITS:**

- Draft Consent Decree

IN THE UNITED STATES DISTRICT COURT  
FOR THE DISTRICT OF OREGON  
PORTLAND DIVISION

UNITED STATES OF AMERICA, STATE OF OREGON  
BY AND THROUGH DEPARTMENT OF  
ENVIRONMENTAL QUALITY,

Plaintiffs,

Case No.

v.

CITY OF SANDY, OREGON

Defendant.

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**CONSENT DECREE**

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## I. BACKGROUND

Plaintiff United States of America, on behalf of the United States Environmental Protection Agency (“EPA”), and the State of Oregon by and through the Oregon Department of Environmental Quality (the “State”) (collectively “Plaintiffs”), have filed a complaint in this action concurrently with this Consent Decree pursuant to Section 309 of the Clean Water Act (“CWA” or “Act”), 33 U.S.C. § 1319, and Oregon Revised Statute (“ORS”) 468.140, alleging that Defendant, City of Sandy, Oregon (“Sandy” or “City”), violated and continues to violate Sections 301 and 402 of the CWA, 33 U.S.C. §§ 1311 and 1342, and ORS 468B.025(2) by failing to comply with the requirements of its National Pollution Discharge Elimination System Permit (“NPDES Permit”) for the City’s Wastewater Treatment Plant located at 33400 Southeast Jarl Road in Boring, Oregon and its 1200-Z Stormwater Discharge General NPDES Permit (“Industrial Stormwater Permit”).

On February 18, 2018, ODEQ and the City entered into a Mutual Agreement and Order (“MAO”) resolving civil penalties assessed for violations of the City’s NPDES Permit. Pursuant to the MAO, the City was to provide an Updated Facility Plan by January 1, 2019, and plant improvements were to be completed by November 1, 2021, that would bring the City into compliance with the terms and conditions of its NPDES Permit.

In April 2019, the City requested a revised schedule for the MAO, as the improvements were not on schedule to meet the November 1, 2021 deadline.

The City submitted a Facility Plan to ODEQ in October 2019 that was approved on January 17, 2020. A “Preliminary Design Report: Sandy WWTP Immediate Needs Upgrades Project,” was submitted in July of 2020 and approved on August 28, 2020. A Preliminary

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Design Evaluation Report was submitted to ODEQ in March of 2021 and approved on April 16, 2021 (attached as Appendix A). Preliminary Need Improvements identified in these plans are not scheduled to be completed until August, 2023 due to supply and construction delays and complications with conducting sampling and stress testing in tandem with construction.

The City now estimates that the preferred alternative in the City's 2019 Wastewater System Facilities Plan is cost prohibitive, and seeks to further evaluate alternatives to bring the system into compliance with its NPDES Permit.

Since October 23, 2017, the City has experienced a significant number of violations of its NPDES Permit, including a high volume of waste discharge limitation violations and six bypass events where waste streams were intentionally diverted from a portion of the treatment facility. Due to system improvements in 2021 and 2022, the City has not had any bypass events since June 11, 2022. ODEQ and EPA have determined, based on the extensive history of violations and the lack of information supporting a conclusion that the City has adequate capacity at the Wastewater Treatment Plant for additional peak system flows and that new or modified connections that increase flow may result in increases in the number and extent of violations of the City's NPDES Permit.

Defendant does not admit any liability to the United States or the State arising out of the transactions or occurrences alleged in the Complaint.

The Parties recognize, and the Court by entering this Consent Decree finds, that this Consent Decree has been negotiated by the Parties in good faith and will avoid litigation among the Parties and that this Consent Decree is fair, reasonable, and in the public interest.

NOW, THEREFORE, before the taking of any testimony, without the adjudication or admission of any issue of fact or law except as provided in Section I, and with the consent of the

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Parties, IT IS HEREBY ADJUDGED, ORDERED, AND DECREED as follows:

## II. JURISDICTION AND VENUE

1. This Court has jurisdiction over the subject matter of this action, pursuant to 28 U.S.C. §§ 1331, 1345, and 1355, and Section 309(b) of the CWA, 33 U.S.C. § 1319(b), and over the Parties. This Court has supplemental jurisdiction over the State law claims asserted by the State of Oregon pursuant to 28 U.S.C. § 1367. Venue lies in this District pursuant to Section 309(b) of the CWA, 33 U.S.C. § 1319(b), and 28 U.S.C. §§ 1391(b) and 1395(a), because the violations alleged in the Complaint are alleged to have occurred in, and Defendant is located in, this judicial district. For purposes of this Decree, or any action to enforce this Decree, Defendant consents to the Court's jurisdiction over this Decree and any such action and over Defendant and consents to venue in this judicial district.

2. For purposes of this Consent Decree, Defendant agrees that the Complaint states claims upon which relief may be granted pursuant to Section 309(b) of the CWA, 33 U.S.C. § 1319(b), ORS 468.035(1)(k) and ORS 468.100.

## III. APPLICABILITY

3. The obligations of this Consent Decree apply to and are binding upon the United States and the State, and upon Defendant and any successors, assigns, or other entities or persons otherwise bound by law.

4. No transfer of ownership or operation of the City of Sandy Treatment Works, whether in compliance with the procedures of this Paragraph or otherwise, shall relieve Defendant of its obligation to ensure that the terms of the Decree are implemented. At least 30 Days prior to such transfer, Defendant shall provide a copy of this Consent Decree to the proposed transferee and shall simultaneously provide written notice of the prospective transfer,

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together with a copy of the proposed written agreement, to EPA, the State, and DOJ, in accordance with Section XV (Notices). Any attempt to transfer ownership or operation of the City of Sandy Treatment Works without complying with this Paragraph constitutes a violation of this Decree.

5. Defendant shall provide a copy of this Consent Decree to all officers, employees, and agents whose duties might reasonably include compliance with any provision of this Decree, as well as to any contractor retained to perform work required under this Consent Decree. Defendant shall condition any such contract upon performance of the work in conformity with the terms of this Consent Decree.

6. In any action to enforce this Consent Decree, Defendant shall not raise as a defense the failure by any of its officers, directors, employees, agents, or contractors to take any actions necessary to comply with the provisions of this Consent Decree.

#### IV. OBJECTIVE

7. The Objective of this Consent Decree is for the City to achieve and maintain compliance with the CWA, ORS Chapter 468B, applicable federal and state regulations, its NPDES Permit and its Industrial Stormwater Permit, with the goal of eliminating all untreated discharges and discharges that fail to meet the effluent limitations established in its NPDES Permit.

#### V. DEFINITIONS

8. Terms used in this Consent Decree that are defined in the CWA, 33 U.S.C. §§ 1251-1387, and ORS Chapter 468B or in regulations promulgated thereunder have the meanings assigned to them in the Act, statutes or such regulations, unless otherwise provided in this

Consent Decree. Whenever the terms set forth below are used in this Consent Decree, the following definitions apply:

“2020-2023 Wastewater Improvements” shall mean the 2021-2023 WWTP Immediate Needs Upgrades Project, 2021 Basins 2 and 8 Rehabilitation Project, and 2022 Basins 6 and 7 Rehabilitation Project;

“Basin” shall mean a subdivision of a Wastewater Collection and Transmission System which consists of hydraulically linked sewers that are tributary to a common point in the sewer system. Sewer system evaluation techniques are undertaken on a basin basis. The basins for the City of Sandy are identified in Appendix B;

“City” or “Sandy” shall mean the Defendant City of Sandy, Oregon, including all of its departments, agencies, and instrumentalities and any successors thereto;

“City of Sandy Treatment Works” or “CSTW” shall mean the wastewater collection, treatment, control, and disposal system for the City of Sandy, including the Wastewater Treatment Plant and the Wastewater Collection and Transmission System;

“Complaint” means the complaint filed by the United States and the State in this action;

“Connection” means a physical connection to the WCTS measured at the time the connection is used or is permitted by the City to increase the flow to the CSTW;

“Consent Decree” or “Decree” means this Decree and all appendices attached hereto (listed in Section XXV);

“Day” means a calendar day unless expressly stated to be a business day. In computing any period of time for a deadline under this Consent Decree, where the last day would fall on a Saturday, Sunday, or federal holiday, the period runs until the close of business of the next business day;

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“Defendant” means the City of Sandy, Oregon;

“DOJ” means the United States Department of Justice and any of its successor departments or agencies;

“EPA” means the United States Environmental Protection Agency and any of its successor departments or agencies;

“Effective Date” means the definition provided in Section XVI;

“Industrial Stormwater Permit” means the 1200-Z Stormwater Discharge General NPDES Permit 17517, ORR900001 authorizing stormwater discharges associated with an industrial activity;

“ODEQ” means the State of Oregon Department of Environmental Quality;

“ODOJ” means the State of Oregon Department of Justice;

“NPDES Permit” means permit number 102492, OR0026573 issued to the City by ODEQ pursuant to ODEQ’s delegated permitting authority under CWA Section 402, 33 U.S.C. § 1342, and any future extended, modified, or reissued permits;

“Paragraph” means a portion of this Decree identified by an Arabic numeral;

“Parties” means the United States, the State, and Defendant;

“Section” means a portion of this Decree identified by a Roman numeral;

“State” means the State of Oregon, acting on behalf of the Oregon Department of Environmental Quality;

“United States” means the United States of America, acting on behalf of EPA;

“Wastewater Collection and Transmission System” or “WCTS” shall mean the municipal wastewater collection, retention and transmission system, including but not limited to, all pipes,

Force Mains, Gravity Sewer Lines, Pump Stations, pumps, manholes, and appurtenances thereto, which are owned or operated by the City and which flow to the City's WWTP;

"Wastewater Treatment Plant" or "WWTP" shall mean all facilities, devices, or systems which are owned, managed, operated, or maintained by the City for the storage, treatment, recycling, or reclamation of municipal wastewater, including the WWTP located at 33400 Southeast Jarl Road in Boring, Oregon, and all components of such wastewater treatment facility;

"Work" shall mean all activities the City is required to perform under this Consent Decree.

#### VI. CIVIL PENALTY

9. Within 30 Days after the Effective Date, Defendant shall pay the sum of \$250,000 as a civil penalty to the United States, together with interest accruing from the date on which the Consent Decree is lodged with the Court, at the rate specified in 28 U.S.C. § 1961 as of the date of lodging.

10. Defendant shall pay the civil penalty due to the United States by FedWire Electronic Funds Transfer ("EFT") to the DOJ account, in accordance with instructions provided to Defendant by the Financial Litigation Program of the United States Department of Justice after the Effective Date. The payment instructions provided will include a Consolidated Debt Collection System ("CDCS") number, which Defendant shall use to identify all payments required to be made in accordance with this Consent Decree. Payment instructions will be provided to:

Jenny Coker, Public Works Director  
City of Sandy  
39250 Pioneer Boulevard  
Sandy, Oregon 97055

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(503) 668-6927  
jcoker@ci.sandy.or.us

on behalf of Defendant. Defendant may change the individual to receive payment instructions on its behalf by providing written notice of such change to DOJ and EPA in accordance with Section XV (Notices).

11. At the time of payment, Defendant shall send notice that payment has been made: (i) to EPA via email at [cinwd\\_acctsreceivable@epa.gov](mailto:cinwd_acctsreceivable@epa.gov) and [steffen.craig@epa.gov](mailto:steffen.craig@epa.gov) or via regular mail at EPA Cincinnati Finance Office, 26 W. Martin Luther King Drive, Cincinnati, Ohio 45268; (ii) to DOJ in accordance with Section XV; and (iii) to EPA in accordance with Section XV. Such notice shall state that the payment is for the civil penalty owed pursuant to the Consent Decree in *United States, et. al v. City of Sandy, Oregon* and shall reference the civil action number, CDCS Number and DOJ case number 90-5-1-1-12501.

12. No later than 30 Days after the Effective Date, Defendant shall pay to the State the \$24,300 penalty assessed in Notice of Civil Penalty Assessment and Order No. WQ/M-NWR-2018-141 (“Notice”), issued by ODEQ to Defendant on February 26, 2019, in resolution of that Notice in the same manner as identified in Paragraph 16.

13. In addition to the civil penalty referenced in the preceding paragraph, a total civil penalty of \$250,000 is payable to the State. In accordance with ODEQ’s Internal Management Directive on Supplemental Environmental Projects (“SEP”), the civil penalty is mitigated to \$50,000 on the condition Defendant completes the approved SEP proposal at Appendix C by December 31, 2028. Defendant shall refrain from using the value of the SEP as a tax deduction or as part of a tax credit application; and, if and when Defendant publicizes the SEP or the results of the SEP, Defendant will state in a prominent manner that the project was undertaken as settlement of an ODEQ enforcement action.

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Defendant will be deemed to have completed the SEP when ODEQ receives the following documentation: A written report from the Clackamas River Basin Council confirming that it received at least \$200,000 from Defendant and expended the money in the manner described in the SEP proposal.

14. Defendant shall pay the \$50,000 portion of the civil penalties, not subject to mitigation through the SEP, within 30 Days of the Effective Date.

15. Should Defendant fail to complete the approved SEP by December 31, 2028, Defendant shall pay the balance of the civil penalties, \$200,000, plus 9% interest per annum beginning on the Effective Date, within 30 Days of the completion deadline.

16. Defendant shall pay the civil penalties owed to the State in Paragraphs 12-15 by check or money made out to “Oregon State Treasurer” and submitted to Oregon DEQ, Attn: Business Office, 700 NE Multnomah Street, Portland, OR 97232. At the time of payment, Defendant shall send notice that payment has been made to ODEQ via email to Kieran.ODONNELL@deq.oregon.gov.

#### VII. COMPLIANCE REQUIREMENTS

17. Defendant shall comply with the CWA, ORS Chapter 468B, implementing regulations, and its NPDES Permit with respect to the CSTW and its Industrial Stormwater Permit.

18. Capacity, Management, Operation, and Maintenance. Within 180 Days of the Effective Date, Sandy shall submit to EPA and ODEQ for review and approval a Capacity, Management, Operation, and Maintenance (“CMOM”) Program for the City’s Wastewater Collection and Transmission System. The CMOM Program shall be developed in accordance with EPA’s 2005 Guidance titled “Guide for Evaluating Capacity, Management, Operation, and

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Maintenance Programs at Sanitary Sewer Collection Systems.” The CMOM Program shall be stamped and signed by a registered professional engineer licensed to practice in the State of Oregon, demonstrating that the Program has been developed in accordance with EPA’s 2005 Guidance and sound engineering practices. Upon approval, Sandy shall implement the CMOM Program and shall annually review the Program, by December 31 of each year, and update the Program as necessary to ensure that it is consistent with accepted industry practices to properly manage, operate, and maintain sewer systems, identify and inventory areas within sewer systems with capacity constraints, and implement measures to ensure adequate capacity throughout its sewer systems. Any updates to the CMOM Program shall be completed by March 31 of the year following the annual review of the CMOM Program and the updated CMOM Program shall be provided to EPA and ODEQ no later than 30 Days following completion of the updated CMOM Program.

19. Sewer Assessment and Rehabilitation Program. By December 31, 2025, Sandy shall for all basins within its WCTS: (1) investigate sources of infiltration and inflow by means of smoke testing, CCTV inspection, and other identification methods; and (2) provide EPA and ODEQ for review and approval an annual report and rehabilitation plan, to be submitted by December 31 of each year, containing a schedule for completion of all basins, the results of the smoke testing and other infiltration and inflow identification efforts, and identifying planned corrective measures along with a schedule for implementation. Corrective measures must include removing heavy sediment and making repairs to category 4 and 5 defects from the National Association of Sewer Service Companies (“NASSCO”) rating system. All identified corrective measures shall be completed within 10 years of the Effective Date of the Consent Decree.

20. Preliminary Design Improvements. By October 31, 2023, the City shall complete construction and begin operation of improvements detailed in the 2020-2023 Wastewater Improvements, in accordance with ODEQ approved design plans.

21. Stress Test. The City has previously submitted to EPA and ODEQ, and EPA and ODEQ have reviewed and approved, a plan for conducting a stress test at the Wastewater Treatment Plant as outlined in Paragraph 9.b. of Appendix D. By June 30, 2023, Sandy shall perform the Stress Test in accordance with the plan approved by EPA and ODEQ.

22. Amended Wastewater Facilities Plan. The City shall submit to EPA and ODEQ, for review and approval, an Amended Wastewater Facility Plan that complies with the requirements of Appendix E and proposes alternatives to bring the City into compliance with the terms and conditions of the NPDES Permit. The schedule for final completion of all work under the Amended Wastewater Facility Plan shall be as expeditious as possible, but in no event longer than fifteen (15) years from the date the Facilities Plan is approved by EPA and ODEQ.

23. Capacity Assurance Program. The City shall implement the Capacity Assurance Program outlined in Appendix D that limits new sewer connections until capacity for the additional flows associated with those new or modified connections has been demonstrated within City of Sandy Treatment Works during both dry and peak flows.

24. Approval of Deliverables. After review of any plan, report, or other item that is required to be submitted pursuant to this Consent Decree, EPA and the State will in writing: (a) approve the submission; (b) approve the submission upon specified conditions; (c) approve part of the submission and disapprove the remainder; or (d) disapprove the submission. If all or part of a submission is disapproved, the EPA and the State will explain in writing the reasons for the disapproval, including identifying any deficiencies subject to Paragraphs 25 or 26.

25. If the submission is approved pursuant to Paragraph 24(a), Defendant shall take all actions required by the plan, report, or other document, in accordance with the schedules and requirements of the plan, report, or other document, as approved. If the submission is conditionally approved or approved only in part pursuant to Paragraph 24(b) or (c), Defendant shall, upon written direction from EPA and the State, take all actions required by the approved plan, report, or other item that EPA and the State determines are technically severable from any disapproved portions, subject to Defendant's right to dispute only the specified conditions or the disapproved portions, under Section XI (Dispute Resolution).

26. If the submission is disapproved in whole or in part pursuant to Paragraph 24(c) or (d), Defendant shall, within 60 Days or such other time as the Parties agree to in writing, correct all deficiencies and resubmit the plan, report, or other item, or disapproved portion thereof, for approval, in accordance with the preceding Paragraphs. If the resubmission is approved in whole or in part, Defendant shall proceed in accordance with the preceding Paragraph.

27. If a resubmitted plan, report, or other item, or portion thereof, is disapproved in whole or in part, EPA and the State may again require Defendant to correct any deficiencies, in accordance with the preceding Paragraphs, subject to Defendant's right to invoke Dispute Resolution and the right of EPA and the State to seek stipulated penalties as provided in the preceding Paragraphs.

28. If Defendant elects to invoke Dispute Resolution as set forth in Paragraphs 25 or 27, Defendant shall do so by sending a Notice of Dispute in accordance with Paragraph 57 within 30 Days (or such other time as the Parties agree to in writing) after receipt of the applicable decision.

29. Any stipulated penalties applicable to the original submission, as provided in Section IX, accrue during the 60 Day period described in Paragraph 26 or other specified period, but shall not be payable unless the resubmission is untimely or is disapproved in whole or in part; provided that, if the original submission was so deficient as to constitute a material breach of Defendant's obligations under this Decree, the stipulated penalties applicable to the original submission shall be due and payable notwithstanding any subsequent resubmission.

30. Permits. Where any compliance obligation under this Section requires Defendant to obtain a federal, state, or local permit or approval, Defendant shall submit timely and complete applications and take all other actions necessary to obtain all such permits or approvals. Defendant may seek relief under the provisions of Section X (Force Majeure) for any delay in the performance of any such obligation resulting from a failure to obtain, or a delay in obtaining, any permit or approval required to fulfill such obligation, if Defendant has submitted timely and complete applications and has taken all other actions necessary to obtain all such permits or approvals.

#### VIII. REPORTING REQUIREMENTS

31. Defendant shall submit the following reports to EPA and the State at the addresses set forth Section XV (Notices):

- a. By July 31<sup>st</sup> and January 31<sup>st</sup> of each year after the lodging of this Consent Decree, until termination of this Decree pursuant to Section XIX, Defendant shall submit a semi-annual report for the preceding six months that includes: the status of any construction or compliance measures; completion of milestones; problems encountered or anticipated, together with implemented or proposed

solutions; status of permit applications; operation and maintenance; reporting on Capacity Assurance Program in compliance with Paragraph 13 of Appendix D; reports to state agencies; and a summary of costs incurred since the previous report.

- b. The report shall also include a description of any noncompliance with the requirements of this Consent Decree and an explanation of the violation's likely cause and of the remedial steps taken, or to be taken, to prevent or minimize such violation. If Defendant violates, or has reason to believe that it may violate, any requirement of this Consent Decree, Defendant shall notify DOJ, EPA, and the State of such violation and its likely duration, in writing, within ten business days of the Day Defendant first becomes aware of the violation or potential violation, with an explanation of the violation's likely cause and of the remedial steps taken, or to be taken, to prevent or minimize such violation. If the cause of a violation cannot be fully explained at the time the report is due, Defendant shall so state in the report. Defendant shall investigate the cause of the violation and shall then submit an amendment to the report, including a full explanation of its cause, within 30 Days of the Day Defendant becomes aware of the cause of the violation. Nothing in this Paragraph or the following Paragraph relieves Defendant of its obligation to provide the notice required by Section X (Force Majeure).

32. Whenever any violation of this Consent Decree or of any applicable permits or any other event affecting Defendant's performance under this Decree may pose an immediate threat to the public health or welfare or the environment, Defendant shall notify EPA and the State by telephone at (206) 553-1816 and (503) 229-5019 and by email to [levo.brian@epa.gov](mailto:levo.brian@epa.gov), [R10enforcement@epa.gov](mailto:R10enforcement@epa.gov), and [bailey.randall@deq.state.or.us](mailto:bailey.randall@deq.state.or.us) as soon as possible, but no later than 24 hours after Defendant first knew of the violation or event. This procedure is in addition to the requirements set forth in the preceding Paragraph.

33. Each report submitted by Defendant under this Section shall be signed by an official of the submitting party and include the following certification:

I certify under penalty of perjury that this document and all attachments were prepared under my direction or supervision in accordance with a system designed to assure that qualified personnel properly gather and evaluate the information submitted. Based on my inquiry of the person or persons who manage the system, or those persons directly responsible for gathering the information, the information submitted is, to the best of my knowledge and belief, true, accurate, and complete. I have no personal knowledge that the information submitted is other than true, accurate, and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fine and imprisonment for knowing violations.

34. This certification requirement does not apply to emergency or similar notifications where compliance would be impractical.

35. The reporting requirements of this Consent Decree do not relieve Defendant of any reporting obligations required by the CWA or implementing regulations, or by any other federal, state, or local law, regulation, permit, or other requirement.

36. Any information provided pursuant to this Consent Decree may be used by the United States and/or the State in any proceeding to enforce the provisions of this Consent Decree and as otherwise permitted by law.

IX. STIPULATED PENALTIES

37. Defendant shall be liable for stipulated penalties to the United States and the State for violations of this Consent Decree as specified below, unless excused under Section X (Force Majeure). A violation includes failing to perform any obligation required by the terms of this Decree, including any work plan or schedule approved under this Decree, according to all applicable requirements of this Decree and within the specified time schedules established by or approved under this Decree.

38. Late Payment of Civil Penalty. If Defendant fails to pay the civil penalty required to be paid under Section VI (Civil Penalty) when due, Defendant shall pay a stipulated penalty of \$5,000 per Day for each Day that the payment is late.

39. Permit Violations. The following stipulated penalties shall accrue for each violation of any requirement of Defendant's Permits (NPDES Permit and Industrial Stormwater Permit) specified below:

- a. Waste Discharge Limit Violations. For each violation of the requirement to comply with all daily, weekly, or monthly effluent limits on parameters set forth in the Permit or any final effluent limits under any successor permit, Defendant shall pay a stipulated penalty as follows:

Penalty Per Violation

\$5,000 for each violation of each daily limit  
\$10,000 for each violation of each weekly or seven day limit  
\$20,000 for each violation of each monthly or 30-day limit

- b. Bypasses. The following penalties apply to any bypasses made in violation of the requirements of Defendant's NPDES Permit:

Per Violation Per day

First violation per year . . . . . \$15,000 per violation per day  
Second and Third violation . . . . . \$30,000 per violation per day  
Fourth violation or more . . . . . \$50,000 per violation per day

- c. Any other violations of the Permit shall be subject to the following penalties per violation per day.

<u>Penalty Per Violation Per Day</u>	<u>Period of Noncompliance</u>
\$500 . . . . .	1st through 14th Day
\$1,000. . . . .	15th through 30th Day
\$2,500. . . . .	31st Day and beyond

40. Compliance Milestones.

- a. The following stipulated penalties shall accrue per violation per Day for each violation of the requirements identified in Paragraphs 18-22 of this Consent Decree (CMOM, Sewer Assessment and Rehabilitation Program, Preliminary Design Improvements, Stress Test, Amended Facilities Plan), including failing to meet deadlines set by the Consent Decree or within any deliverables:

<u>Penalty Per Violation Per Day</u>	<u>Period of Noncompliance</u>
\$700 . . . . .	1st through 14th Day
\$1500 . . . . .	15th through 30th Day
\$2500 . . . . .	31st Day and beyond

- b. The following stipulated penalties shall accrue per violation per Day for each violation of the requirements of the Capacity Assurance Program:

- (a) For any new sewer service connection or change to an existing connection that results in additional flow that is



approved by the City in violation of Capacity Assurance

Program:

\$10,000 per Equivalent Residential Unit calculated as outlined in Paragraphs 15-16 of Appendix D.

41. Reporting Requirements. The following stipulated penalties shall accrue per violation per Day for each violation of the reporting requirements of Section VIII:

<u>Penalty Per Violation Per Day</u>	<u>Period of Noncompliance</u>
\$100. ....	1st through 14th Day
\$300. ....	15th through 30th Day
\$500. ....	31st Day and beyond

42. Stipulated penalties under this Section shall begin to accrue on the Day after performance is due or on the Day a violation occurs, whichever is applicable, and shall continue to accrue until performance is satisfactorily completed or until the violation ceases. Stipulated penalties shall accrue simultaneously for separate violations of this Consent Decree.

43. Defendant shall pay stipulated penalties to the United States and the State within 30 Days of a written demand by either Plaintiff. Defendant shall pay 50 percent of the total stipulated penalty amount due to the United States and 50 percent to the State. The Plaintiff making a demand for payment of a stipulated penalty shall simultaneously send a copy of the demand to the other Plaintiff.

44. Either Plaintiff may in the unreviewable exercise of its discretion, reduce, or waive stipulated penalties otherwise due to it under this Consent Decree.

45. Stipulated penalties shall continue to accrue as provided in Paragraph 42, during any Dispute Resolution, but need not be paid until the following:

- a. If the dispute is resolved by agreement of the Parties or by a decision of EPA or the State that is not appealed to the Court,

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Defendant shall pay accrued penalties determined to be owing, together with interest, to the United States or the State within 30 Days of the effective date of the agreement or the receipt of EPA's or the State's decision or order.

- b. If the dispute is appealed to the Court and the United States or the State prevails in whole or in part, Defendant shall pay all accrued penalties determined by the Court to be owing, together with interest, within 60 Days of receiving the Court's decision or order, except as provided in subparagraph c, below.
- c. If any Party appeals the Court's decision, Defendant shall pay all accrued penalties determined to be owing, together with interest, within 15 Days of receiving the final appellate court decision.

46. Obligations Prior to the Effective Date. Upon the Effective Date, the stipulated penalty provisions of this Decree shall be retroactively enforceable with regard to any and all violations of Section VI (Compliance Requirements) that have occurred after signature but prior to the Effective Date, provided that stipulated penalties that may have accrued prior to the Effective Date may not be collected unless and until this Consent Decree is entered by the Court.

47. Defendant shall pay stipulated penalties owing to the United States in the manner set forth in Paragraph 10 and with the confirmation notices required by Paragraph 11, except that the transmittal letter shall state that the payment is for stipulated penalties and shall state for which violation(s) the penalties are being paid. Defendant shall pay stipulated penalties owing to the State in the manner set forth in Paragraph 16.

48. If Defendant fails to pay stipulated penalties according to the terms of this Consent Decree, Defendant shall be liable for interest on such penalties, as provided for in 28 U.S.C. § 1961, accruing as of the date payment became due. Nothing in this Paragraph shall be construed to limit the United States or the State from seeking any remedy otherwise provided by law for Defendant's failure to pay any stipulated penalties.

49. The payment of penalties and interest, if any, shall not alter in any way Defendant's obligation to complete the performance of the requirements of this Consent Decree.

50. Non-Exclusivity of Remedy. Stipulated penalties are not the United States' or State's exclusive remedy for violations of this Consent Decree. Subject to the provisions of Section XIII (Effect of Settlement/Reservation of Rights), the United States and the State expressly reserve the right to seek any other relief it deems appropriate for Defendant's violation of this Decree or applicable law, including but not limited to an action against Defendant for statutory penalties, additional injunctive relief, mitigation or offset measures, and/or contempt. However, the amount of any statutory penalty assessed for a violation of this Consent Decree shall be reduced by an amount equal to the amount of any stipulated penalty assessed and paid for the same violation pursuant to this Consent Decree.

#### X. FORCE MAJEURE

51. "Force majeure," for purposes of this Consent Decree, is defined as any event arising from causes beyond the control of Defendant, of any entity controlled by Defendant, or of Defendant's contractors, that delays or prevents the performance of any obligation under this Consent Decree despite Defendant's best efforts to fulfill the obligation. The requirement that Defendant exercise "best efforts to fulfill the obligation" includes using best efforts to anticipate any potential force majeure event and best efforts to address the effects of any potential force

majeure event (a) as it is occurring and (b) following the potential force majeure, such that the delay and any adverse effects of the delay are minimized. “Force Majeure” does not include Defendant’s financial inability to perform any obligation under this Consent Decree.

52. If any event occurs or has occurred that may delay the performance of any obligation under this Consent Decree, whether or not caused by a force majeure event, Defendant shall provide notice by telephone to (206) 553-1816 and (503) 229-5019 and by email to [levo.brian@epa.gov](mailto:levo.brian@epa.gov), [R10enforcement@epa.gov](mailto:R10enforcement@epa.gov), and [bailey.randall@deq.state.or.us](mailto:bailey.randall@deq.state.or.us), within 72 hours of when Defendant first knew that the event might cause a delay. Within seven Days thereafter, Defendant shall provide in writing to EPA and the State an explanation and description of the reasons for the delay; the anticipated duration of the delay; all actions taken or to be taken to prevent or minimize the delay; a schedule for implementation of any measures to be taken to prevent or mitigate the delay or the effect of the delay; Defendant’s rationale for attributing such delay to a force majeure event if it intends to assert such a claim; and a statement as to whether, in the opinion of Defendant, such event may cause or contribute to an endangerment to public health, welfare or the environment. Defendant shall include with any such notice all available documentation supporting the claim that the delay was attributable to a force majeure. Failure to comply with the above requirements shall preclude Defendant from asserting any claim of force majeure for that event for the period of time of such failure to comply, and for any additional delay caused by such failure. Defendant shall be deemed to know of any circumstance of which Defendant, any entity controlled by Defendant, or Defendant’s contractors knew or should have known.

53. If EPA, after a reasonable opportunity for review and comment by the State, agrees that the delay or anticipated delay is attributable to a force majeure event, the time for

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performance of the obligations under this Consent Decree that are affected by the force majeure event will be extended by EPA, after a reasonable opportunity for review and comment by the State, for such time as is necessary to complete those obligations. An extension of the time for performance of the obligations affected by the force majeure event shall not, of itself, extend the time for performance of any other obligation. EPA will notify Defendant in writing of the length of the extension, if any, for performance of the obligations affected by the force majeure event.

54. If EPA, after a reasonable opportunity for review and comment by the State, does not agree that the delay or anticipated delay has been or will be caused by a force majeure event, EPA will notify Defendant in writing of its decision.

55. If Defendant elects to invoke the dispute resolution procedures set forth in Section XI (Dispute Resolution), it shall do so no later than 15 Days after receipt of EPA's notice. In any such proceeding, Defendant shall have the burden of demonstrating by a preponderance of the evidence that the delay or anticipated delay has been or will be caused by a force majeure event, that the duration of the delay or the extension sought was or will be warranted under the circumstances, that best efforts were exercised to avoid and mitigate the effects of the delay, and that Defendant complied with the requirements of Paragraphs 51 and 52. If Defendant carries this burden, the delay at issue shall be deemed not to be a violation by Defendant of the affected obligation of this Consent Decree identified to EPA and the Court.

#### XI. DISPUTE RESOLUTION

56. Unless otherwise expressly provided for in this Consent Decree, the dispute resolution procedures of this Section shall be the exclusive mechanism to resolve disputes arising under or with respect to this Consent Decree. Defendant's failure to seek resolution of a dispute

under this Section shall preclude Defendant from raising any such issue as a defense to an action by the United States to enforce any obligation of Defendant arising under this Decree.

57. Informal Dispute Resolution. Any dispute subject to Dispute Resolution under this Consent Decree shall first be the subject of informal negotiations. The dispute shall be considered to have arisen when Defendant sends DOJ, EPA, and the State a written Notice of Dispute. Such Notice of Dispute shall state clearly the matter in dispute. The period of informal negotiations shall not exceed 30 Days from the date the dispute arises, unless that period is modified by written agreement. If the Parties cannot resolve a dispute by informal negotiations, then the position advanced by the United States and the State shall be considered binding unless, within 20 Days after the conclusion of the informal negotiation period, Defendant invokes formal dispute resolution procedures as set forth below.

58. Formal Dispute Resolution. Defendant shall invoke formal dispute resolution procedures, within the time period provided in the preceding Paragraph 57, by sending DOJ, EPA, and the State a written Statement of Position regarding the matter in dispute. The Statement of Position shall include, but need not be limited to, any factual data, analysis, or opinion supporting Defendant's position and any supporting documentation relied upon by Defendant.

59. The United States and the State will send Plaintiffs' Statement of Position to Defendant within 45 Days of receipt of Defendant's Statement of Position. The Plaintiffs' Statement of Position shall include, but need not be limited to, any factual data, analysis, or opinion supporting that position and any supporting documentation relied upon by the United States and the State. The Plaintiffs' Statement of Position is binding on Defendant, unless

Defendant files a motion for judicial review of the dispute in accordance with the following Paragraph.

60. Judicial Dispute Resolution. Defendant may seek judicial review of the dispute by filing with the Court and serving on the United States and the State a motion requesting judicial resolution of the dispute. The motion (a) must be filed within 20 Days of receipt of the Plaintiffs' Statement of Position pursuant to the preceding Paragraph; (b) may not raise any issue not raised in informal dispute resolution pursuant to Paragraph 57, unless the Plaintiffs raise a new issue of law or fact in the Statement of Position; (c) shall contain a written statement of Defendant's position on the matter in dispute, including any supporting factual data, analysis, opinion, or documentation, and (d) shall set forth the relief requested and any schedule within which the dispute must be resolved for orderly implementation of the Consent Decree.

61. The Plaintiffs shall respond to Defendant's motion within the time period allowed by the Local Rules of this Court. Defendant may file a reply memorandum, to the extent permitted by the Local Rules.

62. Standard of Review

a. Disputes Concerning Matters Accorded Record Review. Except as otherwise provided in this Consent Decree, in any dispute brought under Paragraph 60 pertaining to: the adequacy or appropriateness of plans, procedures to implement plans, schedules or any other items requiring approval by EPA and ODEQ under this Consent Decree; the adequacy of the performance of work undertaken pursuant to this Consent Decree; and all other disputes that are accorded review on the administrative record under applicable

principles of administrative law, Defendant shall have the burden of demonstrating, based on the administrative record, that the position taken by the United States is not consistent with the Consent Decree or applicable law.

- b. Other Disputes. Except as otherwise provided in this Consent Decree, in any other dispute brought under Paragraph 58, Defendant shall bear the burden of demonstrating that its position complies with this Consent Decree and better furthers the Objectives of the Consent Decree.

63. The invocation of dispute resolution procedures under this Section shall not, by itself, extend, postpone, or affect in any way any obligation of Defendant under this Consent Decree, unless and until final resolution of the dispute so provides. Stipulated penalties with respect to the disputed matter shall continue to accrue from the first Day of noncompliance, but payment shall be stayed pending resolution of the dispute as provided in Paragraph 45. If Defendant does not prevail on the disputed issue, stipulated penalties shall be assessed and paid as provided in Section IX (Stipulated Penalties).

## XII. INFORMATION COLLECTION AND RETENTION

64. The United States, the State, and their representatives, including attorneys, contractors, and consultants, shall have the right of entry into any facility covered by this Consent Decree, at all reasonable times, upon presentation of credentials, to:

- a. monitor the progress of activities required under this Consent Decree;
- b. verify any data or information submitted to the United States or the



State in accordance with the terms of this Consent Decree;

- c. obtain samples and, upon request, splits of any samples taken by Defendant or its representatives, contractors, or consultants;
- d. obtain documentary evidence, including photographs and similar data; and
- e. assess Defendant's compliance with this Consent Decree.

65. Upon request, Defendant shall provide EPA and the State or their authorized representatives splits of any samples taken by Defendant. Upon request, EPA and the State shall provide Defendant splits of any samples taken by EPA or the State.

66. Until five years after the termination of this Consent Decree, Defendant shall retain, and shall instruct its contractors and agents to preserve, all non-identical copies of all documents, records, or other information (including documents, records, or other information in electronic form) in its or its contractors' or agents' possession or control, or that come into its or its contractors' or agents' possession or control, and that relate in any manner to Defendant's performance of its obligations under this Consent Decree. This information-retention requirement shall apply regardless of any contrary corporate or institutional policies or procedures. At any time during this information-retention period, upon request by the United States or the State, Defendant shall provide copies of any documents, records, or other information required to be maintained under this Paragraph.

67. At the conclusion of the information-retention period provided in the preceding Paragraph, Defendant shall notify the United States and the State at least 90 Days prior to the destruction of any documents, records, or other information subject to the requirements of the preceding Paragraph and, upon request by the United States or the State, Defendant shall deliver

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any such documents, records, or other information to EPA or the State. Defendant may assert that certain documents, records, or other information is privileged under the attorney-client privilege or any other privilege recognized by federal law. If Defendant asserts such a privilege, it shall provide the following: (a) the title of the document, record, or information; (b) the date of the document, record, or information; (c) the name and title of each author of the document, record, or information; (d) the name and title of each addressee and recipient; (e) a description of the subject of the document, record, or information; and (f) the privilege asserted by Defendant. However, no documents, records, or other information created or generated pursuant to the requirements of this Consent Decree shall be withheld on grounds of privilege.

68. Defendant may also assert that information required to be provided under this Section is protected as Confidential Business Information (“CBI”) under 40 C.F.R. Part 2. As to any information that Defendant seeks to protect as CBI, Defendant shall follow the procedures set forth in 40 C.F.R. Part 2.

69. This Consent Decree in no way limits or affects any right of entry and inspection, or any right to obtain information, held by the United States or the State pursuant to applicable federal or state laws, regulations, or permits, nor does it limit or affect any duty or obligation of Defendant to maintain documents, records, or other information imposed by applicable federal or state laws, regulations, or permits.

### XIII. EFFECT OF SETTLEMENT/RESERVATION OF RIGHTS

70. This Consent Decree resolves the civil claims of the United States and the State for the violations alleged in the Complaint filed in this action through the date of lodging.

71. The United States and the State reserve all legal and equitable remedies available to enforce the provisions of this Consent Decree. Defendant retains all rights and defenses to

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such claims except as provided in this Consent Decree. This Consent Decree shall not be construed to limit the rights of the United States or the State to obtain penalties or injunctive relief under the Act or implementing regulations, or under other federal or state laws, regulations, or permit conditions, except as expressly specified in Paragraph 70. The United States and the State further reserve all legal and equitable remedies to address any imminent and substantial endangerment to the public health or welfare or the environment arising at, or posed by, Defendant's CSTW, whether related to the violations addressed in this Consent Decree or otherwise.

72. In any subsequent administrative or judicial proceeding initiated by the United States or the State for injunctive relief, civil penalties, other appropriate relief relating to the CSTW or Defendant's violations, Defendant shall not assert, and may not maintain, any defense or claim based upon the principles of waiver, res judicata, collateral estoppel, issue preclusion, claim preclusion, claim-splitting, or other defenses based upon any contention that the claims raised by the United States or the State in the subsequent proceeding were or should have been brought in the instant case, except with respect to claims that have been specifically resolved pursuant to Paragraph 70.

73. This Consent Decree is not a permit, or a modification of any permit, under any federal, State, or local laws or regulations. Defendant is responsible for achieving and maintaining complete compliance with all applicable federal, State, and local laws, regulations, and permits; and Defendant's compliance with this Consent Decree shall be no defense to any action commenced pursuant to any such laws, regulations, or permits, except as set forth herein. The United States and the State do not, by their consent to entry of this Consent Decree, warrant or aver in any manner that Defendant's compliance with any aspect of this Consent Decree will

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result in compliance with provisions of the CWA, 33 U.S.C. § 1251, et seq., or with any other provisions of federal, State, or local laws, regulations, or permits. Application for construction grants, State Revolving Loan Funds, or any other grants or loans, or other delays caused by inadequate facility planning or plans and specifications on the part of Defendant shall not be cause for extension of any required compliance date in this Consent Decree.

74. This Consent Decree does not limit or affect the rights of Defendant or of the United States or the State against any third parties, not party to this Consent Decree, nor does it limit the rights of third parties, not party to this Consent Decree, against Defendant, except as otherwise provided by law.

75. This Consent Decree shall not be construed to create rights in, or grant any cause of action to, any third party not party to this Consent Decree.

76. Nothing in this Consent Decree limits the rights or defenses available under Section 309(e) of the CWA, 33 U.S.C. § 1319(e), in the event that the laws of the State, as currently or hereafter enacted, may prevent Defendant from raising the revenues needed to comply with this Decree.

#### XIV. COSTS

77. The Parties shall bear their own costs of this action, including attorneys' fees, except that the United States and the State shall be entitled to collect the costs (including attorneys' fees) incurred in any action necessary to collect any portion of the civil penalty or any stipulated penalties due but not paid by Defendant.

XV. NOTICES

78. Unless otherwise specified in this Decree, whenever notifications, submissions, or communications are required by this Consent Decree, they shall be made in writing and sent by mail or email, (with a preference for email), addressed as follows:

As to DOJ by email (preferred): [eescdcopy.enrd@usdoj.gov](mailto:eescdcopy.enrd@usdoj.gov)  
Re: DJ # 90-5-1-1-12501

As to DOJ by mail: EES Case Management Unit  
Environment and Natural Resources Division  
U.S. Department of Justice  
P.O. Box 7611  
Washington, D.C. 20044-7611  
Re: DJ # 90-5-1-1-12501

As to EPA by email (preferred): [levo.brian@epa.gov](mailto:levo.brian@epa.gov) and  
[johnson.patrick@epa.gov](mailto:johnson.patrick@epa.gov)

As to EPA by mail: Brian Levo, Compliance Officer  
U.S. Environmental Protection Agency, Region 10  
1200 6th Avenue, Suite 155, MS 20-C04  
Seattle, Washington 98101

As to the State by email: [Randall.bailey@deq.oregon.gov](mailto:Randall.bailey@deq.oregon.gov) and  
[Jeff.bachman@deq.oregon.gov](mailto:Jeff.bachman@deq.oregon.gov) and  
[nina.englander@doj.state.or.us](mailto:nina.englander@doj.state.or.us)

As to the State by mail: Randall Bailey  
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As to Defendant by email: [tdeems@ci.sandy.or.us](mailto:tdeems@ci.sandy.or.us) and  
[jcoker@ci.sandy.or.us](mailto:jcoker@ci.sandy.or.us)

As to Defendant by mail: Attn: City Manager  
City of Sandy  
39250 Pioneer Boulevard  
Sandy, Oregon 97055

79. Any Party may, by written notice to the other Parties, change its designated notice recipient or notice address provided above.

80. Notices submitted pursuant to this Section shall be deemed submitted upon mailing or transmission by email, unless otherwise provided in this Consent Decree or by mutual agreement of the Parties in writing.

#### XVI. EFFECTIVE DATE

81. The Effective Date of this Consent Decree shall be the date upon which this Consent Decree is entered by the Court or a motion to enter the Consent Decree is granted, whichever occurs first, as recorded on the Court's docket; provided, however, that Defendant hereby agrees that it shall be bound to perform duties scheduled to occur prior to the Effective Date. In the event the United States withdraws or withholds consent to this Consent Decree before entry, or the Court declines to enter the Consent Decree, then the preceding requirements to perform duties scheduled to occur before the Effective Date shall terminate.

#### XVII. RETENTION OF JURISDICTION

82. The Court shall retain jurisdiction over this case until termination of this Consent Decree, for the purpose of resolving disputes arising under this Decree or entering orders modifying this Decree, pursuant to Sections XI and XVIII, or effectuating or enforcing compliance with the terms of this Decree.

#### XVIII. MODIFICATION

83. Except as otherwise set forth in Appendix D, the terms of this Consent Decree, including any attached appendices, may be modified only by a subsequent written agreement signed by all the Parties. Where the modification constitutes a material change to this Decree, it shall be effective only upon approval by the Court.

84. Any disputes concerning modification of this Decree shall be resolved pursuant to Section XI (Dispute Resolution), provided, however, that, instead of the burden of proof provided by Paragraph 62, the Party seeking the modification bears the burden of demonstrating that it is entitled to the requested modification in accordance with Federal Rule of Civil Procedure 60(b).

#### XIX. TERMINATION

85. After Defendant has completed the requirements of Section VII (Compliance Requirements), has thereafter maintained continuous satisfactory compliance with this Consent Decree and Defendant's NPDES Permit for a period of 3 years, has complied with all other requirements of this Consent Decree, and has paid the civil penalty and any accrued stipulated penalties as required by this Consent Decree, Defendant may serve upon the United States and the State a Request for Termination, stating that Defendant has satisfied those requirements, together with all necessary supporting documentation.

86. Following receipt by the United States and the State of Defendant's Request for Termination, the Parties shall confer informally concerning the Request and any disagreement that the Parties may have as to whether Defendant has satisfactorily complied with the requirements for termination of this Consent Decree. If the United States, after consultation with

the State, agrees that the Decree may be terminated, the Parties shall submit, for the Court's approval, a joint stipulation terminating the Decree.

87. If the United States after consultation with the State does not agree that the Decree may be terminated, Defendant may invoke Dispute Resolution under Section XI. However, Defendant shall not seek Dispute Resolution of any dispute regarding termination until 15 Days after service of its Request for Termination.

#### XX. PUBLIC PARTICIPATION

88. This Consent Decree shall be lodged with the Court for a period of not less than 30 Days for public notice and comment in accordance with 28 C.F.R. § 50.7. The United States reserves the right to withdraw or withhold its consent if the comments regarding the Consent Decree disclose facts or considerations indicating that the Consent Decree is inappropriate, improper, or inadequate. Defendant consents to entry of this Consent Decree without further notice and agrees not to withdraw from or oppose entry of this Consent Decree by the Court or to challenge any provision of the Decree, unless the United States has notified Defendant in writing that it no longer supports entry of the Decree.

#### XXI. SIGNATORIES/SERVICE

89. Each undersigned representative of Defendant and other Parties to the Decree and the Assistant Attorney General for the Environment and Natural Resources Division of the Department of Justice identified on the DOJ signature page below, certifies that he or she is fully authorized to enter into the terms and conditions of this Consent Decree and to execute and legally bind the Party he or she represents to this document.

90. This Consent Decree may be signed in counterparts, and its validity shall not be challenged on that basis. Defendant agrees to accept service of process by mail with respect to

CONSENT DECREE  
United States and State of Oregon v. City of Sandy, Oregon  
-cv-

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all matters arising under or relating to this Consent Decree and to waive the formal service requirements set forth in Rules 4 and 5 of the Federal Rules of Civil Procedure and any applicable Local Rules of this Court including, but not limited to, service of a summons. Defendant need not file an answer to the Complaint in this action unless or until the Court expressly declines to enter this Consent Decree.

#### XXII. INTEGRATION

91. This Consent Decree, including deliverables that are subsequently approved pursuant to this Decree, constitutes the entire agreement among the Parties regarding the subject matter of the Decree and supersedes all prior representations, agreements and understandings, whether oral or written, concerning the subject matter of the Decree herein.

#### XXIII. HEADINGS

92. Headings to the Sections and Subsections of this Consent Decree are provided for convenience and do not affect the meaning or interpretation of the provisions of this Consent Decree.

#### XXIV. FINAL JUDGMENT

93. Upon approval and entry of this Consent Decree by the Court, this Consent Decree shall constitute a final judgment of the Court as to the United States, the State, and Defendant.

#### XXV. APPENDICES

94. The following Appendices are attached to and part of this Consent Decree:

“Appendix A” is the Preliminary Design Evaluation Report.

“Appendix B” is the Collection System Basin Map

“Appendix C” is the State Supplemental Environmental Project

“Appendix D” is the Capacity Assurance Program Evaluations

“Appendix E” is the Amended Wastewater System Facility Plan Requirements

CONSENT DECREE

United States and State of Oregon v. City of Sandy, Oregon

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Dated and entered this \_\_ day of \_\_\_\_\_, 20

\_\_\_\_\_  
UNITED STATES DISTRICT JUDGE

CONSENT DECREE  
United States and State of Oregon v. City of Sandy, Oregon  
-cv-

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FOR THE UNITED STATES OF AMERICA:

TODD KIM  
ASSISTANT ATTORNEY GENERAL  
Environment and Natural Resources Division  
U.S. Department of Justice

\_\_\_\_\_  
Date

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NATALIE K. WIGHT  
United States Attorney

\_\_\_\_\_  
Date

\_\_\_\_\_  
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District of Oregon  
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Portland, Oregon 97204

Signature Page  
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United States and State of Oregon v. City of Sandy, Oregon  
-cv-

FOR THE U.S. ENVIRONMENTAL PROTECTION AGENCY:

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-cv-

FOR THE U.S. ENVIRONMENTAL PROTECTION AGENCY CONTINUED:

\_\_\_\_\_  
Date

\_\_\_\_\_  
ROSEMARIE KELLEY  
Director  
Office of Civil Enforcement  
Office of Enforcement and Compliance Assurance  
U.S. Environmental Protection Agency

\_\_\_\_\_  
Date

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FOR THE STATE OF OREGON:

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Date

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NINA R. ENGLANDER #106119  
Assistant Attorney General  
Oregon Department of Justice  
100 S.W. Market Street  
Portland, Oregon 97201

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Date

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Oregon Department of Environmental Quality  
Manager of Office of Compliance and Enforcement  
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Portland, Oregon 97232

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FOR DEFENDANT:

\_\_\_\_\_  
Date

\_\_\_\_\_  
TYLER DEEMS  
Interim City Manager  
City of Sandy  
39250 Pioneer Boulevard  
Sandy, Oregon 97055

Signature Page  
CONSENT DECREE  
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-cv-

## Sandy Wastewater Treatment Plant Condition Assessment Improvements Project

PREPARED FOR

City of Sandy, OR



PREPARED BY



A-1



# Sandy Wastewater Treatment Plant Condition Assessment Improvements Project Preliminary Design Evaluation Report

Prepared for

**City of Sandy**

Project No. 964-50-20-01



EXPIRES : 6/30/2022

Project Manager: Preston Van Meter

March 2021

Date

Handwritten signature of Timothy R. Banyai in blue ink.

QA/QC Review: Timothy R. Banyai

March 2021

Date

**Condition Assessment Improvements Project  
Preliminary Design Evaluation Report**



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**LIST OF ACRONYMS**

2019 Condition Assessment	Condition Assessment in July 2019
2019 Facilities Plan	Wastewater Facilities Plan in 2019
2019 Facilities Plan	Wastewater Facilities Plan in 2019
2020 PDR	Immediate Needs Improvements Project Preliminary Design Report
AACE	Association for the Advancement of Cost Engineering
AAF	Average Annual Flow
ACH	Air Changes per Hour
ADWF	Average Dry Weather Flow
aSRT	Aerobic Solids Retention Time
ASSB	Aerated Sludge Storage Basin
ASSB	Aerated Sludge Storage Basin
BOD	Biological Oxygen Demand
City	City of Sandy

## Condition Assessment Improvements Project Preliminary Design Evaluation Report



CMU	Concrete Masonry Unit
DO	Dissolved Oxygen
EDI	Energy Dissipating Inlet
FRP	Fiberglass Reinforced Plastic
GPM	Gallons Per Mile
I&C	Instrumentation and Control
IMLR	Internal Mixed Liquor Recycle
IOT	Internet of Things
LEL	Lower Explosive Limit
MBR	Membrane Bioreactor
MCCs	Motor Control Centers
MGD	Millions of Gallons
MLSS	Mixed Liquor Suspended Solids
MMDWF	Maximum Month Dry Weather Flow
MMWWF	Maximum Month Wet Weather Flow
NFPA	National Fire Protection Association
NPDES	National Pollutant Discharge Elimination System
OPCC	Opinion of Probable Construction Cost
OSHA	Occupational Safety and Health Administration
PDF	Peak Day Flow
PDR	Preliminary Design Report
PIF	Peak Instantaneous Flow
PLC	Programmable Logic Controller
Project	City of Sandy WWTP Condition Assessment Improvements Project
PVC	Polyvinyl Chloride
RAS	Recycled Activated Sludge
RPS	Return Pump Station
SCADA	Supervisory Control and Data Acquisition
SCFM	Standard Cubic Feet Per Minute
SRT	Solids Retention Time
TAG	The Automation Group
TM	Technical Memorandum
UV	Ultraviolet
VFD	Variable Frequency Drives
WAS	Waste Activated Sludge
WWTP	Wastewater Treatment Plant

## **1.0 INTRODUCTION**

The City of Sandy (City) developed a Wastewater Facilities Plan in 2019 (2019 Facilities Plan), which identified wastewater collection, conveyance and treatment system improvements to be implemented in three phases through 2040. The 2019 Facilities Plan also identified several immediate needs projects required to improve the performance of the Wastewater Treatment Plant (WWTP).

After the 2019 Facilities Plan was completed, the City conducted a Condition Assessment in July 2019 (2019 Condition Assessment), which identified additional immediate needs projects beyond those identified in the 2019 Facilities Plan. The City then performed several operational and mechanical improvements to the WWTP after completion of the 2019 Condition Assessment.

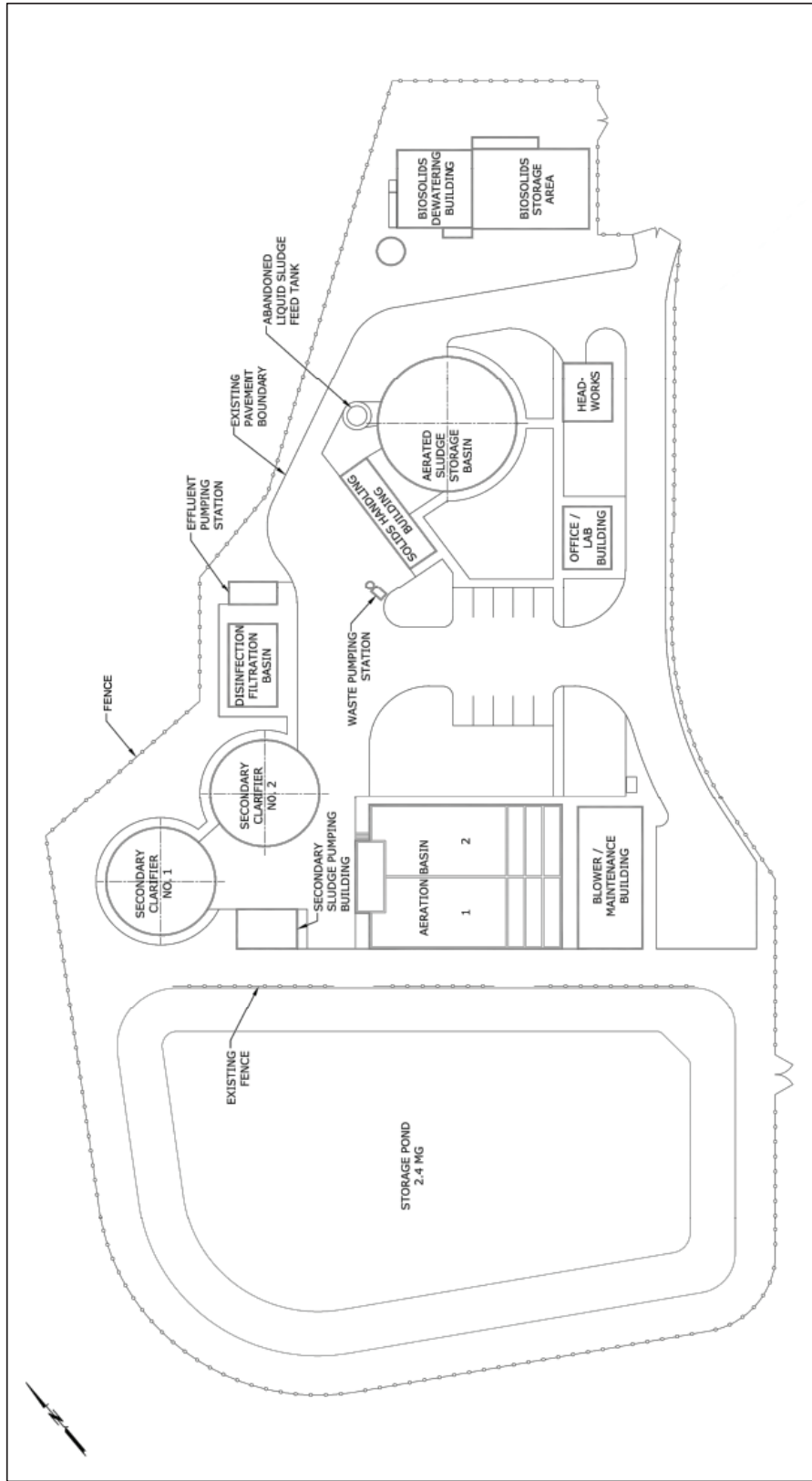
In the summer of 2020, the City developed the Immediate Needs Improvements Project Preliminary Design Report (2020 PDR). The 2020 PDR presented a preliminary design for the improvements required at the WWTP based on the recommendations in the 2019 Facilities Plan, the findings of the 2019 Condition Assessment, and the improvements implemented in 2019.

This report evaluates the recommendations in the 2020 PDR and presents a modified set of recommended improvements, which will more efficiently utilize the City's budget while also effectively addressing the operational and maintenance deficiencies at the WWTP. These improvements will be implemented under the City of Sandy WWTP Condition Assessment Improvements Project (Project).

In addition to the recommended improvements identified in this report, a "Wish List" of improvements that can be implemented under this Project, if funding allows, or under future projects is provided in Appendix E. The items included on the Wish List are improvements identified by City and plant operations staff during site visits conducted for this Project. The Wish List is intended to be a living document that can be changed over time to keep track of small and large improvements that the City wishes to complete.

## **2.0 OVERVIEW OF EXISTING FACILITIES**

The City of Sandy WWTP is located at 33400 SE Jarl Road in Boring, Oregon. A site plan showing the major processes, buildings, and other site features at the WWTP is shown in Figure 2-1. A summary of the design influent flows for the WWTP from the 2020 PDR are provided in Table 2-1. A summary of the major equipment sizing and design criteria from the 2020 PDR are provided in Table 2-2. The existing condition of the major processes, building and other site features are discussed in more detail in Section 3.0.



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Figure 2-1. Sandy WWTP Site Plan

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Preliminary Design Evaluation Report**



**Table 2-1. Sandy WWTP Influent Design Flows**

Flow Condition	Design Flow, million gallons per day (mgd)						
	Exist	2025	2026 <sup>1</sup>	2030	2035	2036 <sup>2</sup>	2040
Average Annual Flow (AAF)	1.4	1.5	0.9	1.1	1.4	0.8	1.2
Average Dry Weather Flow (ADWF)	1.1	1.2	0.7	0.9	1.1	0.6	0.9
Maximum Month Dry Weather Flow (MMDWF)	1.4	1.5	0.9	1.2	1.4	0.8	1.2
Maximum Month Wet Weather Flow (MMWWF)	2.7	2.9	1.8	2.2	2.6	1.4	2.3
Peak Day Flow (PDF)	5.9	5.5	3.9	4.8	5.7	3.2	5.0
Peak Instantaneous Flow (PIF)	9.1	9.9	6.4	7.7	9.1	5.6	7.0

Notes:  
 1. First phase of the Eastside Satellite Plant begins operation in 2026  
 2. Second phase of the Eastside Satellite Plant begins operation in 2036.

**Table 2-2. Sandy WWTP Existing Design Criteria**

Parameter	Value
<b>Raw Screening</b>	
Screen Type	Drum Screen
Screen Capacity	6.7 mgd
Screen Channel Width	4 ft
Screen Bar Spacing	1/4-in
<b>Manual Screen</b>	
Type	Bar Screen Rack
Quantity	1
Width	2 ft
Bar Spacing	3/4-inch
<b>Grit Removal</b>	
Type	Vortex
Max Flow	7.0 mgd
Grit Chamber Diameter	10 ft
Air Scour	75 standard cubic feet per minute (scfm)
Grit Chamber Mechanism Drive Motor	1 hp
Grit Pump	250 gpm @ 30 ft TDH, 5 hp
Grit Concentrator	250 gpm
Grit Classifier Screw Conveyor Drive	1 hp
<b>Influent Flow Measurement</b>	
Type	Parshall flume with level sensor
Throat width	12-inch
Capacity	9.2 mgd
<b>Aeration Basins</b>	
Number of Trains	2

**Condition Assessment Improvements Project  
Preliminary Design Evaluation Report**



**Table 2-2. Sandy WWTP Existing Design Criteria**

Parameter	Value
Total Basin Volume	740,000 gal
Selector Cells (3 per train)	75,000 gal, ea
Aerobic Cells (1 per train)	145,000 gal, ea
Average Sidewater Depth	17.79 ft
Diffuser Type	Fine Bubble Disc, 7 in dia.
Submersible Mixers (Total 4)	4 hp
Internal Mixed Liquor Recycle Pumps (Total 2)	750 gpm @ 12.0 ft TDH, 5 hp ea
Utility Pumps (Total 2)	2,800 gpm @ 12 ft TDH, ea
Blowers (No. 1-3)	
Type	Multi-stage Centrifugal
Capacity	1,350 scfm
Motor	100 hp
Blowers (No. 4)	
Type	Positive Displacement
Capacity	1,199 scfm
Motor	60 hp
<b>Secondary Clarifiers</b>	
Quantity	2
Capacity	3.5 mgd, ea.
Surface Overflow Rate at Capacity	1,500 gal/day per ft <sup>2</sup>
Diameter	54 ft
Side-water Depth	15 ft
Mechanism Drive	3/4 hp
<b>RAS Pumps</b>	
Quantity	2
Capacity	600 gpm @ 23 ft TDH, ea
Motor	7.5 hp
<b>WAS Pumps</b>	
Quantity	2
Capacity	260 gpm @ 23 ft TDH, ea
Motor	5 hp
<b>Filters</b>	
Type	Disk Filters
Number of Units	2
Number of Disks per Unit	6
Capacity, total	6 mgd
Average Flow Rate	2 gpm/ft <sup>2</sup>
Disk Drive	1/2 hp, ea



**Condition Assessment Improvements Project  
Preliminary Design Evaluation Report**



**Table 2-2. Sandy WWTP Existing Design Criteria**

Parameter	Value
Backwash Pump Quantity	2
Backwash Pump Drive	2 hp, ea
High Pressure Wash Pump Quantity	2
High Pressure Wash Pump Drive	40 hp, ea
<b>Ultraviolet (UV) Disinfection</b>	
Type	Medium Pressure
Number of Channels	1
Peak Flow Rates	7.0 mgd
Dosage	30,010 microwatt sec/cm <sup>2</sup>
Headloss	17.7 in
<b>Aerated Sludge Storage Basin</b>	
Center Well	90,000 gallons
Cell No. 1:	90,000 gallons
Cell No. 2:	180,000 gallons
<b>Decant Pumps</b>	
Quantity	3
Capacity	50 gpm @ 22 ft TDH
Motor	1/2 hp
<b>Sludge Transfer Pump</b>	
Quantity	2
Motor	10 hp
<b>Diffusers</b>	
Center Well	270, 7-in dia fine bubble membrane disc
Cell No. 1 and No. 2	16, coarse bubble
<b>Sodium Hypochlorite Storage &amp; Metering Facility</b>	
Number of Tanks	2
Tank Volume	1,000 gallons, ea
Number of Metering Pumps	2
Metering Pump Capacity	5 gph
<b>Waste Pump Station</b>	
Pump Station Type	Wet Pit with valve vault
Wet Pit Diameter	4 ft
<b>Pumps</b>	
Type	Submersible
Quantity	2
Capacity	350 gpm @ 22 ft TDH, ea
Motor	3 hp

### **3.0 PRELIMINARY DESIGN EVALUATION**

This section summarizes the existing condition of each process area at the WWTP, the improvements recommended in the 2020 PDR, an evaluation of the 2020 PDR recommendations and a modified set of improvements recommended for implementation under this Project. Drawings of the proposed improvements are provided in Appendix A.

#### **3.1 Headworks Facility**

##### ***3.1.1 Existing Conditions***

The existing headworks consists of a drum screen in a 4-foot wide channel with 1/4-inch openings; a manual screen in a 2-foot wide bypass channel; a 10-foot diameter vortex grit removal basin; and a Parshall flume for measuring influent flow. The grit basin is equipped with an airlift pump that pumps grit from the bottom of the basin and discharges it to a grit classifier. The grit classifier removes water and organic material from the grit and conveys the grit via a screw conveyor to a dumpster. The drum screen also discharges screenings to the same dumpster.

The headworks facility has the following deficiencies:

- The headworks equipment is over 20 years old and is reaching the end of its useful life.
- The drum screen does not have adequate capacity to treat future peak wet weather flows.
- Solids and rags leak through the side seals on the drum screen and influent flow periodically overflows the bypass channel isolation gate. This results in poor removal of solids and rags from the influent flow.
- There is no means of removing the screen from the channel to perform routine maintenance on the screen.
- The paddle mixer in the grit removal basin failed recently.
- The grit pump and grit pump discharge piping need replacement.
- There is no redundant mechanical screen or grit removal equipment at the headworks facility.
- The hydraulic grade line of the headworks facility is not compatible with future planned primary clarifiers, which are required to treat the additional solids load from the future Eastside Satellite MBR facility. The headworks facility will need to be relocated to a higher elevation to allow primary clarifiers to be installed at the WWTP.

##### ***3.1.2 Previous Preliminary Design Recommendations and Discussion***

The 2020 PDR recommended the following improvements for the headworks facility:

- Replace the drum screen in-kind.
- Replace the vortex grit removal equipment including paddle mixer, grit pump, grit concentrator, grit classifier, and screw conveyor in-kind.
- Install a motorized crane next to the screen to improve maintenance accessibility.

## Condition Assessment Improvements Project Preliminary Design Evaluation Report



- Replace the headworks equipment control panel to improve control from the Supervisory Control and Data Acquisition (SCADA) system.
- Repair/replace the conduit and wiring between field equipment and motor control centers (MCCs) in the blower building.

After reviewing the existing conditions of the headworks facility and the 2020 PDR recommendations, West Yost recommends the City make limited investments in the existing headworks facility for the following reasons:

- The biggest issue impacting operation of the headworks facility is peak flows and system hydraulics. The current headworks is simply not designed for the nearly 10 millions of gallons of (MGD) peak flows that are believed to enter the facility during peak storm events.
- The main bearing on the existing drum screen has been replaced and the screen is functioning adequately.
- Ultimately, the headworks facility will need to be relocated to a higher elevation to support the future installation of primary clarifiers as part of the major planned expansion when the Eastside Membrane Bioreactor (MBR) facility is constructed.

As a result, West Yost recommends a modified approach for addressing the deficiencies at the headworks facility as summarized in the following section.

### ***3.1.3 Modified Preliminary Design Recommendations***

Based on the analysis summarized above, it recommended that the following improvements, which will improve permit compliance, treatment performance, and maintenance access be implemented at the headworks facility under this Project:

- Install a motorized gantry crane next to the existing drum screen to assist in removing the screen from the channel for routine maintenance.
- Replace the paddle mixer in the grit basin.
- Replace the grit pump and grit pump discharge piping.
- Implement structural improvements to prevent influent flow from overflowing the bypass channel isolation gate and bypass the screen.

These recommended upgrades are shown on Drawings S000 and M001 included in Appendix A.

## **3.2 Equalization Basin**

### ***3.2.1 Existing Conditions***

The existing flow equalization facilities consist of a flow control structure, an equalization basin and utility pumps that drain the basin and discharge flow into the aeration basins. The flow control structure was installed in 2018 and is designed to split flow from the headworks facility to the aeration basin and the equalization basin using two fixed weirs. The weir elevations are set to allow flow to the equalization basin when influent flow exceeds 2.0 mgd. The existing flow equalization facilities have the following deficiencies:

- The existing flow control structure and equalization basin do not include any instrumentation to measure flow to the equalization basins or water surface level in the basins. As a result, the basin frequently overfills.
- Large plumes of algae have been observed to build up in the equalization basin.
- The existing utility pumps that drain the basin back into the aeration basin are constant speed pumps and are oversized. Therefore, when operation staff begin draining the equalization basin, large slugs of flow with high concentrations of algae are discharged into the aeration basins. The presence of algae in the equalization basins return flow can inhibit the biological treatment in the aeration basins and result in permit violations.

### ***3.2.2 Previous Preliminary Design Recommendations and Discussion***

The 2020 PDR recommended the following improvements to the flow equalization facilities, which were focused on adding instrumentation to measure flow to the equalization basins and water level in the basins:

- Build a concrete flow control structure in the equalization basin and extend the existing 16-inch Polyvinyl Chloride (PVC) bypass pipe from the aeration basin to this flow control structure
- Install a walkway out to the concrete flow control structure.
- Install a 350 gallons per mile (gpm) submersible pump within the flow control structure to allow for drainage of the equalization basin back to the aeration basin as needed.
- Install a magnetic flow meter on the new bypass pipe and an ultrasonic level transmitter in the equalization basin.

After reviewing the existing conditions of the flow equalization facilities and the 2020 PDR recommendations, a slightly different approach is recommended for the equalization basin upgrades. Instead of building a new flow control structure, it is recommended that existing facilities be modified to better control and measure flow to the equalization basin. It is also recommended that floating aerators be added to the equalization basin to reduce the formation of algae in the basins.

### ***3.2.3 Modified Preliminary Design Recommendations***

To meet the deficiencies noted above, the following improvements are recommended for the equalization basin:

- Evaluate the design of the flow control structure using the existing Visual Hydraulics model and modify the elevation of the weirs to reduce the frequency at which raw sewage is discharged into the equalization basins. Proposed modifications include removing the existing baffles and static weir plates in the flow control structure and installing a motorized weir gate in the structure to control flow to the equalization basin.
- Install a level sensor in the existing flow control structure to measure the level over the proposed weir gate. This level measurement can be used to determine flow to the equalization basin and can also be used to send an alarm to operators and the SCADA system to inform them that flow is diverted to the equalization basin.
- Install a level sensor in the equalization basin to allow operators and the SCADA system to know the depth of the basin.

- Install floating aerators in the equalization basin to limit algae growth.
- Install motorized plug valves on the discharge piping of the existing utility pumps, which can be used to adjust the output from the pumps. This will allow operations staff to return water from the equalization basin back into the treatment plant at a rate that does not overwhelm the treatment process.

These recommended upgrades are showing on Drawings C001 and M003 included in Appendix A.

### **3.3 Aeration Basins**

#### **3.3.1 Existing Conditions**

The existing aeration basins are split into two trains each consisting of two anoxic zones and two aerobic zones. The anoxic zones are equipped with submersible mixers and the aerobic zones are equipped with a floor-mounted grid of fine bubble diffusers. A common influent channel conveys raw sewage from the headworks facility into the first anoxic zone, first aerobic zone, or second aerobic zone of either train. Recycled activated sludge (RAS) is discharged into either the upstream or downstream end of the common influent channel where it is mixed with the raw/screened sewage before entering the aeration basins. Mixed liquor from both aeration basin trains is collected in a common effluent channel that directs flow to the secondary clarifiers. The common effluent channel also directs a portion of the flow to an internal mixed liquor recycle (IMLR) pump station that is configured to allow a portion of the mixed liquor to be returned to any of the four zones in each aeration basin train. Bypass piping allows flow from the first aerobic zone of each aeration basin train to bypass the second aerobic zone and be discharged into the common effluent channel. Air is delivered to the fine-bubble diffusers with three 1,350 scfm, 100 hp multi-stage centrifugal blowers and one 1,199 scfm, 60 hp positive displacement blower.

The aeration basins have the following deficiencies:

- Air leaks have been identified in the ductile iron air piping. Some of the air leaks have been repaired, but the air piping is in poor condition.
- The aeration basins do not have an effective aeration control system. There are two dissolved oxygen (DO) probes in the aeration basins. However, the blowers are constant speed and the air piping drop legs delivering air to the fine bubble diffusers in the aerobic zones are not equipped with flow meters and modulating valves. Therefore, airflow cannot be adequately adjusted to meet oxygen demand. This results in periods of low DO concentrations that impairs biological oxygen demand (BOD) and ammonia removal, resulting in permit violations.
- A significant amount of foam builds up in the aeration basins on a regular basis. The low DO in the aeration basins contributes to the foam build-up. Also, the mixed liquor must pass under several flow control slide gates as it flows through the aeration basins. This configuration does not allow foam to exit the aeration basins.
- The openings in the walls separating each zone of the aeration basins are located on the same side of the aeration basin. This configuration does not create a serpentine flow path through the various zones. Instead, the configuration allows flow to short circuit directly from the influent opening to the effluent opening in each zone. This results in inadequate mixing in each zone and inadequate treatment time in each zone.

- When the bypass piping connecting the first aerobic zone to the mixed liquor effluent channel is used, raw sewage entering the aeration basins will receive very little treatment, because of the short-circuiting issue noted above.
- The influent wastewater does not have adequate alkalinity and prevents the nitrification process from occurring in the aeration basins because the pH is lowered to below recommended levels. The low pH inhibits biological treatment, which results in permit violations.
- The configuration of the mixed liquor effluent channel results in more flow from the eastern train entering the IMLR pump station. Therefore, nitrified effluent from the western train is not adequately returned to the anoxic zones for denitrification.
- There is not adequate means of balancing the flow from the mixed liquor effluent channel into the two secondary clarifiers.

### ***3.3.2 Previous Preliminary Design Recommendations and Discussion***

The 2020 PDR recommended the following improvements for the aeration basins:

- Replace two multi-stage centrifugal blowers with two new variable speed blowers.
- Install new motor-operated butterfly valves on the air piping drop legs serving each train.

After review, West Yost recommends a slightly different approach for the aeration basin upgrades. We do not recommend replacing the existing blowers as recommended in the 2020 PDR, nor do we think the addition of actuated butterfly valves on the existing aeration header will provide adequate aeration control. As the “heart” of the treatment process, much work is needed in the aeration basin to address the biological process and operational issues. Our recommendations are summarized in the following section.

### ***3.3.3 Modified Preliminary Design Recommendations***

A Biowin<sup>®</sup> biological process model was developed to evaluate the performance of the aeration basins and determine the improvements needed to address the deficiencies discussed above. The process modeling is summarized in the technical memorandum (TM) included in Appendix B. Summary of key findings from the process model include:

- Optimization of the secondary process treatment system through mechanical upgrades and operational changes to the aeration basins is necessary to meet the current effluent limitations at the anticipated 2025 wet weather flows and load conditions.
- The key capacity limitation is the solids loading on the secondary clarifiers during peak flow conditions and operating the aeration basins in a fully aerobic mode with an inlet step feed will maximize treatment capacity by lowering the solids loadings to the clarifiers.
- With the recommended changes, the steady-state BioWin<sup>®</sup> modeling predicts the WWTP will be able to meet the effluent limitations following filtration. However, the State Point model predicts clarifier failure at flows exceeding 7.0 mgd which is about 2.0 mgd lower than the defined peak instantaneous flow conditions.
- The steady-state modeling approach used for this analysis does provide a conservative assessment of the available capacity for handling peak flow conditions. However, the dynamic modeling needed to fully optimize the treatment process performance for short-

term peak flow conditions is complex and requires a significant amount of process data and wastewater characterization that is not available.

- The addition of a third clarifier would eliminate performance concerns with the secondary clarifier system and would allow the aeration basins to be operated at a higher mixed liquor suspended solids (MLSS) concentration, increasing overall performance of the secondary process. However, once the new satellite treatment system is constructed, the overall loadings to the plant will decrease. Therefore, it would not be prudent to construct a new secondary clarifier facility at this time.
- It may also be possible to further lower MLSS concentrations in peak flow conditions by using the Aerated Sludge Storage Basin (ASSB) for contact stabilization. Additional modeling analysis is needed to assess this possible strategy.

Based on the results of the process modeling, it is recommended that the aeration basins be operated as described below and as summarized in Table 3-1 to improve performance and address the deficiencies discussed above:

- **Anoxic/Aerobic Zone Configuration:**
  - Install a divider wall in the last cell of each train, dividing those cells into two smaller cells, creating five cells in each train (Cells A1 – A5 and B1 – B5)
  - Configure the first two cells in each train as swing zones
  - Operate the swing zones in anoxic mode during the dry season and aerobic mode during the wet season
  - Operate the last three cells in each train as aerobic zones year round
- **Step-Feed Operations:**
  - During the dry season, it is recommended that all flow be discharged into the first swing zone
  - During the wet season, it is recommended that half the raw/screened sewage be discharged into the first swing zone of each train and the other half be discharged to the second aerobic zone of each train.
- **IMLR Flows**
  - During the dry season, when the first two cells of each train are being operated in anoxic modes, the IMLR pumps should be operated to return nitrified mixed liquor to the anoxic zones for denitrification. The IMLR flows should be set to the maximum 1.08 mgd per train.
  - During the winter season, when all cells are being operated in aerobic mode, the IMLR should be off.
  - The IMLR piping should be modified so that IMLR flows are discharged to the first cell of each train only.
- **RAS Flows**
  - It is recommended that the RAS pump be modified so that they can achieve a return rate of 50 percent of influent flow during current max day conditions (1,800 gpm).
  - The RAS pumps should be operated at a return rate of 100 percent of influent flows for influent flows up to 2.6 mgd.

- When influent flows exceed 2.6 mgd, the RAS pump should be operated at their max pumping rate 1,800 gpm.

**Table 3-1. Sandy WWTP Summary of Aeration Basin Operational Recommendations**

Parameter	Wet Season Operation	Dry Season Operation
Cell A1 and B1	Aerobic	Anoxic
Cell A2 and B2	Aerobic	Anoxic
Cells A3 – A5 and B3 – B5	Aerobic	Aerobic
Raw/Screened Sewage Discharge Location	33 – 50 percent to Cell A1/B1 50 – 67 percent to Cell A4/B4	100% to Cell A1/B1
RAS Rate	50 – 100 percent of Influent, 1,800 gpm max	50 – 100 percent of Influent, 1,800 gpm max
IMLR Rate	0 gpm	1,500 gpm
Aerobic Solids Retention Time (aSRT)	6.5 days	4.0 days, min
MLSS Concentration, max	1,900 mg/L	2,900 mg/L

Recommended aeration basin mechanical improvements required to implement the proposed operational changes and to address the deficiencies discussed above, are summarized as follows:

- Install a concrete baffle wall to divide the two existing aerobic cells (largest cells in each aeration train) into two smaller aerated cells;
- Replace slide gates on the influent channel with downward opening weir gates to allow control of flow into each zone;
- Modify the RAS and IMLR piping so that RAS and IMLR flows are discharged to the first zone of each train under all conditions;
- Remove the aeration piping and diffusers and install the following aeration system components:
  - Two new stainless-steel air headers, one serving each train of the aeration basins.
  - Three grids of fine bubble diffusers in each aeration basin train: one grid in the anoxic zones, one grid in the first two aerobic zones, and one grid in the final aerobic zone.
  - New air piping drop legs for each fine bubble diffuser grid.
  - New flow meters and motorized butterfly valves on each air piping drop leg.
  - Three DO probes in each train of the aeration basins.
- Install VFDs on the three existing multi-stage centrifugal blowers and implement a control strategy tied to new air drops with air mass flow meters and actuated butterfly valves;
- Implement the following improvements to create a serpentine flow path through each aeration basin train and prevent scum accumulation in each cell:
  - Provide new openings in the wall between Cell A2 and A3 and the wall between Cell B2 and B3. The new opening will be near the center of the basins.



- Provide openings in the new wall between Cells A4 and A5 and the new wall between Cells B4 and B5. The openings shall be near the outer edge of the basins.
- Add fiberglass reinforced plastic (FRP) baffles at the opening to Cells A4 and B4 to direct flow toward the center of the basins and limit short-circuiting of flow through those cells. Replace the slide gates on the effluent channel and gate between the aeration basin zones with downward opening gates to prevent foam from accumulating in the aeration basins;
- Install a concrete divider wall in the middle of the effluent channel to dedicate a single secondary clarifier to each aeration basin train to improve the flow split between the secondary clarifiers;
- Install new piping below the effluent channel to direct mixed liquor into the IMLR pump station.
- Install a gate on the overflow cutout on the utility pump station.
- If project funding allows, it is recommended to investigate a way to measure flow going into each secondary clarifier. This is placed on a Wish List of improvement included in Appendix E.

These recommended upgrades are shown on Drawings S001, S002, S003, S004, M002, M004, and M007 included in Appendix A.

## **3.4 RAS/WAS Pump Station**

### **3.4.1 Existing Conditions**

The RAS/ WAS pumps station consists of two 600 gpm, 7.5 hp centrifugal RAS pumps and two 100 gpm WAS pump located in the basement of a concrete masonry unit (CMU) block building north of the aeration basins and west of the secondary clarifiers. The RAS/WAS Pump Station has the following deficiencies:

- The RAS/WAS pump station building ventilation system cannot provide the minimum of six air changes per hour (ACH) required by the National Fire Protection Association (NFPA) 820 Standard for a Class 1, Division 2 area.
- The RAS/WAS pump station building does not have a lower explosive limit (LEL) gas sensor, oxygen sensor, or audio/visual gas alarm required by NFPA 820
- The RAS pumps do not have adequate capacity based on the findings of the process modeling TM provided in Appendix B.

### **3.4.2 Previous Preliminary Design Recommendations and Discussion**

The 2020 PDR did not recommend any improvements for the RAS/WAS pump station. Based on West Yost's biological process modeling, it is recommended that the RAS pumping capacity be increased as summarized in the following section.

### **3.4.3 Modified Preliminary Design Recommendations**

To meet the deficiencies noted above, the following improvements are recommended for the RAS/WAS pump station:

- Upgrade the HVAC system to ensure proper ventilation within the basement and building and to meet the requirements of NFPA 820.
- Install LEL gas detectors, oxygen sensors, and audio/visual gas alarms in the RAS/WAS Pump Station.
- Replace the RAS pump motors with new 20 hp, inverter duty rated motors to increase the capacity of each pump to 900 gpm.
- Install variable frequency drives (VFDs) for each RAS pump.
- Modify RAS pump discharge piping to accommodate increased pump capacity.

One opportunity that has been proposed by Veolia that was not able to be included in the current preliminary design evaluation is the potential for using ASSB Cells 1 and 2 as a contact zone during peak flows. West Yost believes this idea has merit and could potentially increase the peak WWTP capacity. Under this scenario, RAS would be pumped to ASSB Cell No.1, flow through Cell No.2 after which it would be pumped to the aeration basin. To implement this process change, the following would be required:

- A new valve vault would be constructed on the existing 8" RAS pipe;
- An 8" RAS pipeline extension would be constructed from the valve vault to ASSB Cell No.1;
- A new submersible RAS Return Pump Station (RPS) would be constructed next to the ASSB to return RAS from ASSB Cell No.2 to the aeration basin; and
- A new 8" return pipe would be installed from the RPS to the new valve vault.

If implemented, these upgrades would also allow pressate from the belt filter press to be diverted to the ASSB during peak storm events to reduce flow to the storm water pump station.

These recommended upgrades are showing on Drawings M006 included in Appendix A.

## **3.5 Secondary Clarifiers**

### **3.5.1 Existing Conditions**

There are two existing secondary clarifiers at the WWTP. Each clarifier is 54-feet in diameter with a 15-foot side water depth; and is equipped with a center feed column, energy dissipating inlet (EDI), flocculation well, cantilevered effluent launders with a scum baffle, a multiple uptake pipe/draft tube type sludge collection mechanism, a scum skimmer arm and a scum box. The secondary clarifiers have the following deficiencies:

- The clarifier mechanisms are over 20 years old, have reached the end of their useful life and need to be replaced.
- Scum/foam accumulates in the clarifiers.
- The sludge collection uptake pipes get clogged with rags.
- The effluent weirs are not level causing short circuiting of the flow through the units.

### ***3.5.2 Previous Preliminary Design Recommendations and Discussion***

Ovivo Eimco and Rebuild-It Services Group performed a site visit and inspection of the secondary clarifiers in June 2020. Based on the findings of that site visit and inspection, it was recommended in the 2020 PDR that the following components be replaced:

- Sludge/scum collector mechanism drive.
- Scum skimmer arm.
- Scum beach flush valves.
- Seals on sludge box.
- Sludge uptake pipe valves.
- Spray nozzles.
- Effluent weirs.
- Effluent baffles.

Rehabilitation of the secondary clarifiers and, especially, leveling the launder weirs is an important part of the project. There are a few items West Yost recommends adding to the project if funding allows as summarized in the following section.

### ***3.5.3 Modified Preliminary Design Recommendations***

The secondary clarifier improvements summarized in the 2020 PDR are recommended for implementation under this Project. It is also recommended that the following improvements be implemented:

- Replace the existing scum beach and box with a system consisting of two scum beaches and boxes, one on either side of the cantilevered launder. This will allow scum to be removed on each side of the launder.
- Replace the section of scum baffle near the new scum beaches with a deeper baffle to prevent scum from bypassing the baffle.
- If project funding allows and depending on improving gravity flow from the scum boxes, it is recommended the scum pump station be upgraded or replaced. This item is one of the items included on the Wish List of improvements in Appendix E.

These recommended upgrades are showing on Drawings M005 included in Appendix A.

## **3.6 Filters and UV Disinfection**

### ***3.6.1 Existing Conditions***

The existing Filter and UV Disinfection Facility consists of two filter basins equipped with cloth disk filters and a UV disinfection channel equipped with 24 medium pressure UV lamps. The existing facility has the following deficiencies:

- The filter media was replaced in 2020 with new cloth media that was anticipated to allow the initial design capacity of 6 MGD to be achieved.
- However, the current filter operation appears to be limited to a capacity of approximately 3 MGD. This is at least partially due to the poor secondary effluent quality that typically flows to the filters during high flow conditions.
- It is anticipated that the recommended aeration basin and secondary clarifier upgrades will improve secondary effluent quality under higher flow conditions but it is unknown at this time how much additional filter capacity will be “recovered”.
- The existing Trojan 4000 UV disinfection system is over 20 years old and has reached the end of its useful life but Veolia has indicated they are still able to get parts and that replacement of the UV system is not the highest priority in the treatment plant.
- The existing 14” outfall pipeline that connects the UV channel effluent wet well is designed with a horizontal flared inlet which allows the pipe to become airlocked.

### ***3.6.2 Previous Preliminary Design Recommendations and Discussion***

The 2020 PDR recommended the following improvements for the Filter and UV Disinfection Facility:

- Replace the existing UV system with a new higher capacity UV disinfection system;
- Perform channel modifications required to accommodate the new UV disinfection system; and
- Install a new programmable logic controller (PLC) and operator interface for the new equipment.

### ***3.6.3 Modified Preliminary Design Recommendations***

West Yost recommends the following Filter/UV area upgrades:

- Replace the existing horizontal flared inlet on the existing 14-inch outfall pipeline with a 90-degree fluted end bend that points down to help prevent air locking of the pipeline;
- Provide baffles in the filter influent channel to better control the flow split between the filter trains.
- Consider installation of a new 3 MGD tertiary treatment train consisting of a skid-system with new secondary effluent diversion pumps, new cloth media disk filters, new medium-pressure UV system, flow meter and composite sampler; and
- Rehabilitate the metal building components on the Filter/UV area cover and replace the sacrificial anode on the cathodic protection system for the structure.

These recommended upgrades are showing on Drawings C001 included in Appendix A.

## **3.7 Aerated Sludge Storage Basin**

### ***3.7.1 Existing Conditions***

The existing ASSB is a circular structure that is split into three cells. Cell No. 1 is a circular cell located at the center of the ASSB with a volume of 90,000 gallons. The two other cells form a “donut” around the center cell. Cell No. 2 has a volume of 180,000 gallons and Cell No. 3 has a volume of 90,000 gallons. WAS

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and secondary clarifier scum are discharged into Cell No. 1 where it is thickened and then overflows into Cell No. 2. Sludge from Cell No. 2 is pumped to a belt filter press with a submersible pump. Filtrate from the belt filter press flows back to Cell No. 3. Decant pumps in Cells No. 2 and No. 3 convey supernatant from those cells back to the Headworks Facility. All three cells are equipped with floor-mounted diffusers that are used to provide mixing, remove ammonia, and prevent anaerobic degradation of stored sludge. Air is supplied to the ASSB with two positive displacement 800 scfm, 25 hp blowers.

A liquid sludge feed tank with recirculation pump is located next to the ASSB. The tank was previously used to mix sludge with lime and provide a sufficient hydraulic grade line for conveyance to the belt filter press. The tank and recirculation pump are currently not in use because the equipment needs to be repaired or replaced.

The ASSB has the following deficiencies:

- The submersible pump in Cell No. 2, which pumps sludge to the belt filter press, cannot meet the design flow and pressure requirements for the belt filter press.
- The ASSB structure and components are in poor condition.
- The walkway around the center cell (Cell No. 1) of the ASSB consists of a single plank of wood and handrailing that is not approved by the Occupational Safety and Health Administration (OSHA). This is a safety hazard for operators.
- The ASSB does not provide adequate sludge detention time to meet the requirements for Class B biosolids.
- There are four davit cranes at the ASSB that do not have adequate reach to remove equipment out of the ASSB and require too much force to crank.
- The existing walkway leading from the side of the ASSB to the center of the ASSB needs to be repaired and re-coated.
- The two existing blowers do not have adequate capacity.

### ***3.7.2 Previous Preliminary Design Recommendations and Discussion***

The 2020 PDR recommended the following improvements for the ASSB:

- Replace the existing center chamber walkway with 3-foot wide platform with OSHA approved handrailing; and
- Replace the four davit cranes around the ASSB with new cranes that have adequate reach and require less force to crank.

West Yost recommends more extensive upgrades to the ASSB and abandoning the proposed walkways and handrails as summarized in the following section.

### ***3.7.3 Modified Preliminary Design Recommendations***

The improvements recommended in the 2020 PDR address some operational and health and safety issues at the ASSB, but do not address solids treatment process deficiencies that would go a long way toward improving solids dewatering performance and reducing polymer consumption. West Yost recommends the following ASSB upgrades be included in the project:

- Remove the walkway around the center cell (Cell No.1) of the ASSB and do not install a new walkway
- Repair, sandblast, and paint the existing walkway leading from the side of the ASSB to the center of the ASSB.
- Re-route the belt filter press filtrate so that it is conveyed to the aeration basins via the Waste Pump Station without passing through the ASSB (see Section 3.9.3 for further discussion on re-routing of these flows)
- Rehabilitate the ASSB aeration system as follows:
  - Replace the existing aeration piping and diffusers with new piping and diffusers
  - Design the new aeration system to provide adequate mixing and to maintain a DO of 1 to 2 mg/L in each cell of the ASSB.
  - Provide four separate zones of diffusers: one in Cell No. 1, two in Cell No. 2, and one in Cell No.3
  - Provide a separate air piping drop leg for each zone of diffusers, each with a flow meter and modulating butterfly valve. The valve and flow meter will be used to control the amount of air provided to each cell of the ASSB.
  - Install a DO probe in each cell of the ASSB.
  - Install one new 800 scfm, 25 hp positive displacement blower to provide air to the ASSB along with the two existing blowers.
- Convert ASSB Cell No. 3 into an aeration/decant zone for thickening and feeding solids to the belt filter press. One of the existing decant pumps will be relocated from ASSB Cell No. 2 to ASSB Cell No. 3 so there is a decant pump on each end of Cell No.3.

These recommended upgrades are showing on Drawings C002 and M008 included in Appendix A.

## **3.8 Chemical Storage and Metering Facilities**

### ***3.8.1 Existing Conditions***

There are two chemical storage and metering facilities at the WWTP: a sodium hypochlorite facility and a sodium hydroxide facility. The sodium hypochlorite facility consists of two 1,000 gallons storage tanks, a diaphragm metering pump skid with two metering pumps and appurtenances, and an emergency eye wash/shower. The equipment is located on the top floor of the RAS/WAS Pump Station.

The sodium hydroxide feed system is located near the headworks and consists of chemical storage totes and a diaphragm metering pump skid. The system is used to increase the pH of the raw wastewater upstream of the aeration basin, to address the low alkalinity issues.

The existing chemical facilities have the following deficiencies:

- The sodium hypochlorite storage and metering facility is not capable of disinfecting the process water system year-round. This creates a health and safety issue for the operators using the water.

- The current sodium hydroxide storage and metering facility at the headworks uses totes and is a temporary system that is manually controlled and does not allow the chemical metering pump discharge rate to be adjusted based on influent flow or process needs.

### ***3.8.2 Previous Preliminary Design Recommendations and Discussion***

The 2020 PDR recommended the following chemical storage and metering facility improvements:

- Install a new sodium hypochlorite metering pump system to pump sodium hypochlorite from the existing storage tank into the process water system to provide year-round disinfection of the process water.
- Replace the temporary sodium hydroxide feed system with a permanent system that allows the chemical feed rate to be adjusted based on influent flow and process needs.

West Yost agrees that a more permanent sodium hydroxide storage and feed system is needed, but recommends it be constructed at an alternate location that will also allow the sodium hypochlorite feed pumps for the utility water and RAS systems to be installed in a common building as summarized in the following section.

### ***3.8.3 Modified Preliminary Design Recommendations***

Several different configurations of the proposed chemical system improvements were considered. The most cost-effective approach recommended for implementation under this Project includes the following improvements:

- Install a new 16-foot by 24-foot concrete pad on the east side of the existing RAS/WAS Pump Station.
- Install an 8,000-gallon, insulated, double-walled, polypropylene tank with a mixer on the concrete pad for storage of 25 percent sodium hydroxide. It is assumed that 25 percent solution will be delivered to the site and that no on-site dilution will be needed.
- Install a fiberglass shed building on the concrete pad equipped with the following:
  - A sodium hydroxide metering pump skid with two pumps and required appurtenances.
  - A sodium hypochlorite metering pump skid with two pumps and required appurtenances.
  - A heater and ventilation fan.
  - Lighting.
  - Required LEL gas sensors, oxygen sensors, and audio/visual alarms.
- Install an emergency eye wash/shower with a 20 gpm, on-demand, tepid water heater on the new concrete pad.
- Install chemical piping required to allow sodium hydroxide to be injected into the RAS pump discharge header.
- Install chemical piping required to allow sodium hypochlorite to be injected into the process water piping and into the RAS pump discharge header.
- Chemical storage and metering facilities shall be designed to provide a minimum of 15-feet of clearance around the secondary clarifiers to allow adequate space for maintenance vehicles to drive around the clarifiers.

These recommended upgrades are showing on Drawings C001 and M005 included in Appendix A.

## **3.9 Waste Pump Station and Stormwater Control**

### **3.9.1 Existing Conditions**

The existing Waste Pump Station consists of a circular wet pit with two 350 gpm, 3 hp submersible pumps and an at-grade rectangular valve vault. The wet pit receives flow from the following sources and discharges it into the 24-inch pipeline that conveys raw sewage from the Headworks Facility to the Aeration Basins:

- Filter backwash water.
- Dewatering Building and Sludge Storage Facility floor drains, roof drains and foundation drains.
- Solids Handling Building roof drains and foundation drains.
- Sanitary sewer flow from the Maintenance Building.

Although the Waste Pump Station receives some stormwater runoff from the WWTP site, the majority of stormwater runoff from the site is discharged into Tickle Creek through Outfall 003. This configuration allows for the potential release of hazardous materials or chlorinated process water into Tickle Creek. To prevent accidental discharge, an inflatable plug has been inserted into the outfall. The plug is removed during storm events and re-installed during dry weather. If drainage accumulates in the outfall during dry weather conditions when the plug is installed, the flow is pumped back to the WWTP with a temporary pump.

### **3.9.2 Previous Preliminary Design Recommendations and Discussion**

The 2020 PDR recommended the following improvements to the Waste Pump Station and stormwater control system:

- Install a new manhole on the existing 15-inch storm drain that discharges into Outfall 003.
- Install new piping to connect the new manhole to the existing Waste Pump Station.
- Install an overflow weir in the manhole that will direct stormwater drainage from the 15-inch storm drain into the Waste Pump Station during normal rain events but allow stormwater drainage during peak events to flow into the Outfall 003.

West Yost believes the proposed storm water upgrades do not provide the assurance City and Veolia staff desire related to ongoing and consistent compliance with the City's National Pollutant Discharge Elimination System (NPDES) 1200z stormwater permit. Recommendations are summarized in the following section.

### **3.9.3 Modified Preliminary Design Recommendations**

The following improvements are recommended for implementation under this Project because they will provide a more comprehensive solution for managing onsite stormwater by directing it entirely back to the headworks downstream of the influent flow meter and composite sampler. In addition, ASSB Cell No. 3 would be freed up for use as the solids decant zone by directing pressate from the belt filter press to



the storm water pump station to be recycled and treated in the aeration basin. Recommended Waste Pump Station and storm water control upgrades include the following:

- Re-route all storm drain piping to discharge into the Waste Pump Station, except for the 10-inch foundation drains from the secondary clarifiers and Filter/UV Facility and the 8-inch overflow piping from the Filter/UV Facility.
- Re-route the belt filter press pressate piping to discharge into the Waste Pump Station.
- Replace the existing submersible pumps with two new 650 gpm, 20 hp pumps with VFDs.
- Replace the pump discharge piping with larger piping to accommodate the larger pumps.
- Install a new valve vault with new valves to accommodate the larger pump discharge piping.
- Installed a new 6-inch diameter force main to convey flow from the Waste Pump Station to the 24-inch pipeline that conveys raw sewage from the Headworks Facility to the Aeration Basins.

These recommended upgrades are showing on Drawings C002 included in Appendix A.

### **3.10 Site Improvements**

The following site improvements are recommended for implementation under this Project:

- Install a new LEL gas sensor, oxygen sensor and audio/visual alarms at the Dewatering Building
- Install new lighting throughout the site as described in Section 3.11

### **3.11 Electrical and Instrumentation and Control (I&C) Improvements**

#### ***3.11.1 Previous Preliminary Design Recommendations and Discussion***

The 2020 PDR recommended the following electrical and instrumentation and control (I&C) improvements throughout the plant:

- Inspect the MCCs and Switchgear inspected and have it serviced by a qualified electrician. After the inspection, apply labels to electrical equipment as determined by the assessment.
- It is noted that physical ingress to some electrical equipment is currently not possible because of field modifications to the equipment in the past. These situations will be identified and corrected to help ensure operations staff safety.
- Replace the PLC hardware.
- Replace the SCADA system computer.
- Upgrade the Cimplicity SCADA software to accommodate the Windows 10 operating system.
- Provide Alarming system in the upgraded SCADA.
- Update the screens to incorporate modern graphics that are easy to navigate.
- Modify the graphics for the new UV Disinfection System.
- Install high speed internet to improve remote monitoring.
- Install Ethernet Network between several buildings.

West Yost worked with The Automation Group, Inc. (TAG) and Landis to further evaluate the electrical and I&C upgrades recommended in the 2020 PDR and determine what improvements are recommended for meeting the objectives of this Project. The major control system components are discussed in Section 3.11.2 and other electrical and I&C improvements are discussed in Section 3.11.3.

### **3.11.2 Control System Components Evaluation**

TAG considered alternatives for each component of the control system recommended for upgrade in the 2020 PDR, evaluated the alternatives, and identified a preferred alternative for each component. The components that were evaluated include:

1. PLC Architecture
2. HMI/SCADA
3. Ethernet Connections via copper CAT6 Shielded vs. Fiber
4. Alarm Dialer via software vs. direct connection (Hardware)
5. Reporting Software
6. Secure Remote Connection

A technical memorandum summarizing the evaluation performed on each of these components is included in Appendix D. The key recommendations from the evaluation are:

- Provide a new SCADA system at the WWTP that is separate from the drinking water and distribution/collections systems. This is to prevent a single failure from affecting the rest of the City.
- Retain as much of the existing PLC system as possible, but replace components needed to upgrade the system to a platform that is fully supported by the manufacturer.
- Re-write the PLC software logic to enhance the process control with the added/upgraded processes.
- Connect new devices to the upgraded PLC system and SCADA by extending the ProfiNet Network to smart communications modules on the new devices
- Use copper CAT6 shielded wire cables to connect PLCs to the new SCADA system. The CAT6 cables can be installed in existing conduits, which may have some tight bends, and can be installed in the same conduit as the camera system ethernet cables. This makes them preferable versus fiber optic cables which cannot be installed in conduits with tight bends or in the same conduits at the camera system cables.
- No new reporting software is needed at this time.
- Connect the alarm dialer system directly to the PLC. This is a more reliable method than using software as the software requires a PC to run continuously.
- Use a Tosi Box Solution to make a secure remote connection to the WWTP, when needed. This type of system uses a two-part authentication (Physical USB Key and Username/Password), which meets the latest Internet of Things (IOT) requirements for a secure connection.

### **3.11.3 Modified Preliminary Design Recommendations**

Other electrical and I&C improvements required to support the recommended process mechanical and site improvements discussed above are as follows:

- **Headworks Facility**
  - Provide power from Office/Lab Building for the new jib crane.
  - Replace the four (4) existing column mounted lights with new 4-foot, vaportight, LED fixtures mounted to the steel joists.
  - Disconnect and reconnect the conductors for the grit motor.
  - Provide conduit and CAT6 cabling for camera.
- **Equalization Basin**
  - Provide conduit and conductors to level transmitter from the RAS Building
  - Provide conduit and conductors to aerators from the RAS Building
- **Aeration Basins**
  - Provide two (2) Instrumentation panels at the end of the basins. Provide CAT6 cabling back to the Blower Building Control Panel PN-1004.
  - Provide control cabling, conduit and power cabling for four (4) DO Sensors.
  - Provide control cabling, conduit and power cabling for six (7) flow meters.
  - Provide control cabling, conduit and power cabling for six (6) motorized valves.
  - Provide control cabling and conduit for two (2) level sensors.
  - Provide control cabling, conduit and power cabling for four (4) motorized actuators.
  - Provide control cabling and conduit for four (4) motorized slide gates.
- **Blower Building**
  - Replace existing MCC-A1 section with VFD drives for each of the four (4) blowers and an active harmonic filter.
  - Disconnect and reconnect existing conductors to each of the four (4) blower starters.
  - Provide conduit and CAT6 cabling for two (2) outdoor rated cameras.
  - Provide conduit and CAT6 cabling from new MCC-A1 to Control Panel PN-1004.
- **RAW/WAS Pump Station**
  - Provide new 400amp, 480/277volt panel at the RAS Building.
  - Provide 400amp conductors in spare conduits in existing conduit duct bank. Provide new conduit from the power vault to the new panel.
  - Provide new conductors and conduit for the two (2) RAS pumps from the new 400Amp panel. Remove existing conductors back to MCC-A.
  - Provide new conductors and conduit for the existing 45kVA transformer from the new 400Amp panel. Remove the existing conductors back to MCC-A.
  - Provide new 120volt branch circuits for the new chemical building from the existing panel CBP-2.
  - Replace existing conductors to the new exhaust fan.

## Condition Assessment Improvements Project Preliminary Design Evaluation Report



- Secondary Clarifiers
  - Disconnect and reconnect existing conductors from secondary clarifier motors.
  - Replace existing light fixture (2 total) with new LED fixtures on a collapsible pole.
  - Replace eight (8) existing lights with new vapor tight LED fixtures.
- Filters and UV Disinfection Facility
  - Provide a new 100amp, 480/277volt panel from MCC-B for new UV train.
  - Provide new 100amp conductors and conduit from MCC-B to a new panel. Provide a 100amp circuit breaker in MCC-B.
  - Replace eight (8) existing lights with new vapor tight LED fixtures.
- ASSB
  - Remove all electrical connections.
  - Provide new VFD for new Blower No. 3. Provide new conductors and conduit from MCC-C. Provide new circuit breaker in MCC-C
- Waste Pump Station
  - Provide new VFDs (total 2) for the new stormwater pump controllers. Provide new conductors and conduit from MCC-C. Provide a new circuit breaker in MCC-C.
  - Provide a new instrumentation panel in the building. Provide one (1) CAT6 cable to Dewatering Building using the existing 1-inch conduit.
  - Provide conductors and conduit for controls to the VFDs from the control panel.
  - Provide conductors and conduit for three (3) pressure sensors to the control panel.
- Dewatering Building
  - Provide new CAT6 cable and conduit for the new camera to the control panel PN-1050.
  - Provide new conductors and conduit to the new exhaust fan in the electrical room.
- Site Improvements
  - Replace four (4) existing area pole fixtures with new LED fixtures. The poles will be reused.
  - Add five (5) new LED area lights with 20-foot poles.
  - Replace the existing building mounted flood light on the Solids Handling Building with a new LED spotlight.
  - Add (2) new LED spotlights on the roof of the Solids Handling Building.
  - Add (3) new LED spotlights on the roof structure of the Disinfection Filtration Basin.
  - Add three (3) CAT6 cables in the existing spare conduits between the Office Building and the Blower Building.
  - Add three (3) CAT6 cables in the existing spare conduits between the Blower Building and the RAS/WAS Building.
  - Add three (3) CAT6 cables in the existing spare conduits between the Office Building and the Solids Handling Building.
  - Add three (3) CAT6 cables in the existing spare conduits between the Office Building and the Effluent Pumping Building.

- Add three (3) CAT6 cables in the existing spare conduits between the Effluent Pumping Building and the Dewatering Building.

These recommended upgrades are showing on the Electrical Drawings included in Appendix A.

## **4.0 OPINION OF PROBABLE CONSTRUCTION COST**

Table 4-1 summarizes the opinion of probable construction cost (OPCC) for the improvements recommended in this PDR. Table 4-1 also summarizes the costs for the improvements recommended in the 2020 PDR and the difference in cost between the 2020 PDR recommendations and the modified set of recommendations included in this PDR.

The OPCC summarized in Table 4-1 was developed using budgetary quotes from vendors and cost data from similar projects and includes the costs listed below:

- Direct Costs = Direct material, equipment, and labor costs
- Subcontractor Markup = 5 percent of material, equipment, and labor provided by subcontractors
- Mobilization and Demobilization = 5 percent of direct costs + subcontractor markup
- Insurance and Bonds = 3 percent of direct costs + subcontractors markup
- OH&P = 6.5 percent of direct costs + subcontractor markup
- Contingency = 15 percent of direct costs + all other markups

Other key information regarding the cost estimate is as follows:

- A detailed breakdown of the costs summarized in Table 4-1 is included in Appendix C
- The OPCC is a Class 4 estimate based on the Association for the Advancement of Cost Engineering (AACE) International guidelines. Typical accuracy ranges for Class 4 estimates are (-)15 to (-)30 percent on the low side and (+)20 to (+)50 percent on the high side.
- The costs for the RAS diversion to the ASSB discussed in Section 3.0 are not included in the OPCC.

**Condition Assessment Improvements Project  
Preliminary Design Evaluation Report**



**Table 4-1. Opinion of Probable Construction Cost (OPCC) Summary**

Item Description	Modified Recommendations	2020 PDR Recommendations	Difference
Headworks Facility	260,000	710,000	(450,000)
Equalization Basin	110,000	0	110,000
Aeration Basin and Blowers	1,400,000	610,000	790,000
Secondary Clarifiers	130,000	350,000	(220,000)
RAS/WAS Pump Station	80,000	0	80,000
Aerated Sludge Storage Basin	560,000	120,000	440,000
Chemical Storage and Metering Facilities	370,000	500,000	(130,000)
Waste Pump Station and Stormwater Control	270,000	70,000	200,000
Site Improvements	510,000	0	480,000
<b>Total Construction Cost</b>	<b>\$3,690,000</b>	<b>\$2,360,000</b>	<b>\$1,330,000</b>
Filter and UV Disinfection Improvements	1,220,000	690,000	530,000
<b>Total Construction Cost + Filter/UV</b>	<b>\$4,910,000</b>	<b>\$3,050,000</b>	<b>\$1,860,000</b>



APPENDIX C



## Supplemental Environmental Project Application

Oregon Department of Environmental Quality  
Office of Compliance and Enforcement  
700 NE Multnomah St., Suite 600  
Portland OR 97232

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**Case Name and No.** *United States, et. al v. City of Sandy, Oregon*  
90-5-1-1-12501

**Project Contact:** Jordan Wheeler, City of Sandy  
39250 Pioneer Blvd. Sandy, OR 97055

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**Type of Project (choose one):**

- Pollution Prevention** – preventing waste or pollution at the source, by conserving energy or natural resources, or by making process changes (such as chemical substitutions) or by making a process more efficient so that less waste is created for a given amount of product.
  
- Pollution Reduction** – reducing the amount and/or danger presented by some form of pollution, often by providing better treatment and disposal of the pollutant.
  
- Public Health Protection**- an example is the medical examination of residents in a community to determine if anyone has experienced any health problems because of the violations at issue.
  
- Environmental Restoration and Protection** –improving the condition of the land, air or water in the area damaged by the violation. For example, restoring a wetland or planting trees along a riparian zone to reduce erosion and provide shade for improved water quality.



**Emergency Planning and Preparedness** – providing assistance to a responsible state or local emergency response or planning entity. Such assistance may include the purchase of computers and/or software, communication systems, chemical emission detection and inactivation equipment, HAZMAT equipment or training.

**Assessments and Audits** to determine if the Respondent is causing any other pollution problems or can run its operation better to avoid future violations.

**Environmental Compliance Promotion**- providing training or technical support to other members of the regulated community to achieve, or go beyond, compliance with applicable environmental requirements.

**Other Projects** that have environmental merit but do not fit within the categories listed above.

**Who is conducting the project?** (i.e. Respondent or third party entity such as a watershed council or other nonprofit organization)  
Clackamas River Basin Council

**Location where project will take place:** Tickle Creek Trail Corridor, Sandy, Oregon

**Project description (Please attach an extra sheet of paper, if necessary):**

This project is a restoration project to improve riparian health and water quality protection along a section of the Tickle Creek Stream Corridor between 362nd Ave to nearly Hwy 211 in Sandy. This section of Tickle Creek is about two miles upstream from Sandy’s Wastewater Treatment Plant. The 1.8 mile Tickle Creek Trail travels along parts of this corridor and was built in 2010. The stream corridor is surrounded by residential development (see attachment 1).

This project will accomplish three objectives:

1. Reduce non-native plants in the riparian corridor.

Reduce invasive and noxious non-native plants in a 37-acre stream corridor with a focus on Himalayan blackberry, ivy, holly, and knotweed. Some invasive plant control and planting was conducted along portions of the corridor in 2015. However, there were insufficient funds for multiple years of treatments. Additionally, climate change and adjacent land use have accelerated tree mortality and canopy loss in the last five years.

In years one and two (2023 and 2024) of the project, CRBC and their contractors will conduct initial non-native plant control, including mechanical and chemical treatments, and closing off trampled areas. Planting of native trees and shrubs along the stream will occur in Winter 2025

(year 3). Spot treatments of persistent non-native plants will occur in years 3 and 4. (See detailed prescription, attached.)

Areas with unmarked private property within 100' of the creek will be surveyed to maximize the riparian area that can be enhanced for water quality protection.

2. Increase native plants, particularly shade-providing conifers, hardwoods and shrubs.

Plant site appropriate conifers, hardwoods and shrubs at sufficient densities to occupy the site and reduce re-establishment of non-native plants. Where appropriate, plant long-lived conifers such as Western redcedar and Douglas-fir to provide shade and future large down wood. The number of plants per acre will vary by site conditions. For example, several acres of riparian and wetland forest have been significantly impacted by blowdown and the loss of tree canopy likely due to an adjacent clearcut. The loss of stream shade and the establishment of high levels of non-native blackberry have reduced the riparian corridor health. This area will be planted at approximately 500 plants per acre. The total plants to be installed across the entire 37 acre project area is estimated to be up to 18,500 (dependent on exact project needs; CRBC will truth the total number of acres and quantity of plants).

3. Mitigate erosion and soil compaction from off-trail disturbance.

Numerous unsanctioned trails and trampled areas have become established in the stream corridor. These areas of off-trail disturbance will be obliterated and restored where feasible, which could include soil rehabilitation, erosion mitigation, mulching, covering exposed ground with logs and debris, and/or replanting. Together, CRBC and City of Sandy will identify areas of off-trail disturbance for treatment.

Attached are aerial maps of the project area.

**What environmental benefits are expected?**

The primary benefit will be improved riparian corridor health including increasing native plants and reducing erosion along the creek, benefiting water quality and wildlife habitat. This project will remove invasive and noxious plants in the stream corridor that compete with native species and reduce native plant diversity. Native trees and shrubs will be installed after invasive and noxious plants have been reduced. This section of Tickle Creek is unusual for its large trees, understory of vine maple, and other shrubs, carpets of native ferns and oxalis, snags, down wood in the creek, and a variety of birds, and wildlife habitat. There are often sightings of coyotes, and occasional bear and cougars along the trail. The large trees and areas of dense native understory provide shade and future large down wood for Tickle Creek. The extreme summer temperatures and drought in recent years have likely contributed to the acceleration of tree mortality in the corridor, along with impacts from adjacent land use.

**How will you measure/assess the benefits?**

Treatment areas will be mapped for inspection and if necessary, re-treatment and/or replanting the following year. Photo points will be made in key infestation areas. Mortality of tree seedlings will be monitored and replanted the following late winter. While we will plant heavily for expected mortality, we will replant the following late winter, if mortality is excessive. The project corridor will be monitored and documented by City staff and partners over a three-year period.

Success can also be measured by area treated and percent survival after 2 years. The project goal is to treat at least 75% of the project site and achieve a 75% survival rate of native plants at age two. The area treated will be mapped during treatment. The planting success will be documented using photo points showing conditions before treatment and at Year Two after planting.

**What is the total projected cost of the project?** Explain. (Qualifying costs are all reasonable costs of executing the SEP and may include costs of preparing the SEP proposal, costs of materials and services, wages paid to employees (appropriate to the work), and wages and proportional overhead for employees of a third party executing the project. Qualifying costs do not include entertainment or refreshment costs related to the SEP.)

The total estimated cost of this project is \$200,000 which includes Clackamas River Basin Council oversight costs, noxious weed treatment, shrub and tree planting, off-trail disturbance mitigation, and community outreach and engagement activities. The budget below is calculated based on an assumption of uniform restoration needs across the 37-acre green space; however, actual treatments will vary across the site and total acreages/costs for each implementation activity are expected to be lower, to be determined by detailed survey and site evaluation to be conducted prior to project implementation. Funds not required for restoration implementation can be utilized for community engagement activities, extended maintenance, and/or other relevant project costs. CRBC will manage site preparation, planting, and two years of maintenance treatments; City of Sandy will assume responsibility for maintaining restored areas after this is complete.

City of Sandy will lead communication directed to city residents and park users, focused on project implementation. CRBC will lead communication for volunteer stewardship and community engagement events focused on natural resource stewardship. Both will coordinate on communication activities for consistent messaging.

Task/Item	Date	Estimated cost
Project management	Duration of project	\$8180 (200 hours for CRBC Riparian Specialist at \$35/hr, 20 hours for CRBC Executive Director at \$59/hr.)

Pre-planting weed treatments	Summer 2023 – Fall 2024	\$80,000 (cutting and spraying in 2023, 3 spray treatments in 2024)
Close off-trail disturbance areas and install mitigation measures (e.g., fencing, erosion control, seeding)	Summer-Fall 2023	\$11,500 (200 hours of general labor at \$50/hour, plus materials)
Install 18,500 native plants	Winter 2025	\$34,500 (includes cost of plants and planting)
Post-planting weed treatments	Spring 2025-Fall 2026	\$41,000 (6 spot treatments over 2 years)
Supplemental planting if needed based on survival rate	Winter 2026	\$4,000 (includes cost of plants and planting)
Community engagement, including volunteer and educational activities	Duration of project	\$2,200 (CRBC outreach staff time and supplies)
Vehicle mileage	Duration of project	\$210 (320 miles at \$0.655/mi.)
Administrative overhead		\$18,180 (10%)
Post-project monitoring and reporting	2027 and 2029	\$300
		<b>\$200,000 Project Total</b>

**What is the timeframe for the project (most projects are completed within one year)?**

Include milestones and final completion date.

<b>Action</b>	<b>Date</b>	<b>Notes</b>
Site inspection and surveys	Spring 2023	Covered by other funding
Finalize plan, contract work	August 2023	
Pre-planting vegetation treatments	August 2023 to October 2024	
Close off-trail disturbance areas and mitigate impacts	Fall 2023	Public Outreach
Native plant installation	Winter 2025	Establish photo points, pre and post planting photos
Post-planting vegetation treatments	Spring 2025 to Fall 2026	
Community engagement	Duration of project	
Planting photo points	Fall 2026	Year 1 after planting
Planting photo points	Fall 2028	Year 3 after planting

**Attachments**

Attachment 1 Tickle Creek Stream Restoration Project Area Map

Attachment 2 Tickle Creek Stream Restoration Planting Species List

Date : 4/7/2023

Signature 



Google Earth

C-Attachment 1

2000 ft

## TICKLE CREEK DEQ SUPPLEMENTAL ENVIRONMENTAL PROJECT NOTES

### Species for stream corridor restoration along Tickle Creek

#### Shrubs

Rose Spirea – *Spiraea douglasii* (Hook or hardhack) 2-6 feet tall.

Snowberry - *Symphoricarpos albus*: to 6 feet, but can be trimmed lower

Thimbleberry – *Rubus parviflorus*: 4-6 feet

Salmonberry - *Rubus spectabilis*: 3-12 feet, branches have prickles for access deterrence

Red huckleberry - *Vaccinium parvifolium* Sm

Red Elderberry - *Sambucus racemosa*

Willows (live fascines) – low growing variety that is shade tolerant.

Stink currant - *Ribes bracteosum*

#### Ferns

Western Sword Fern - *Polystichum munitum*

Western Maidenhair Fern - *Adiantum aleuticum*

Lady Fern - *Athyrium filix-femina*

Piggyback plant - *Tolmiea menziesii*

Trillium leaved sorrel - *Oxalis trilliifolia*

#### Trees

Western red cedar – *Thuja placata*

Douglas fir - *Pseudotsuga menziesii*

**APPENDIX D**

**CAPACITY ASSURANCE PROGRAM (CAP) EVALUATIONS**

1. In accordance with Paragraph 23 of the Consent Decree, the City shall implement the Capacity Assurance Program (“CAP”). The CAP will limit new sewer connections or changes to existing connections that result in additional flows to the City of Sandy Treatment Works (“CSTW”) without a demonstration, and approval by EPA and ODEQ, that capacity to accommodate the additional flows within the Wastewater Collection and Transmission System (“WCTS”) and at the Wastewater Treatment Plant (“WWTP”) exists during both dry and peak flows. The CAP will be separated into two time periods, as explained below. Period One is the period between the Effective Date of this Consent Decree and the date the CAP limit is established for Period Two. Period Two establishes a limit on the number of new connections and/or changes to existing connections that result in additional flows (initially determined in accordance with Paragraphs 10, and adjusted over time in accordance with Paragraph 11, of this Appendix) based on established capacity at the WWTP (“CAP Limit”) and then-current peak flow to the WWTP. The CAP will continue until the improvements for Continued Compliance identified in the approved Amended Wastewater System Facilities Plan, as required in Paragraph 8 of this Appendix, have been implemented, permitted, and are fully operational, and the City is in compliance with all Permit Waste Discharge Limitations.

**RESTRICTIONS DURING PERIOD ONE**

2. The time period between the Effective Date of this Consent Decree and establishment of the CAP Limit shall be considered Period One under the CAP.
3. During Period One of the CAP, the City shall limit new sewer connections or changes to existing connections that result in additional flows to the WCTS to 300 Equivalent Residential Units (“ERUs”) in increased flow (whether from industrial or residential connections). For purposes of the CAP a new connection or changes to existing connections that result in additional flow will be counted for any physical connection to the CSTW at the time that it adds flow to the WWTP.
4. ERUs shall be calculated in accordance with Paragraphs 15-16 of this Appendix, and included in the quarterly reporting outlined in Paragraph 13 of this Appendix.



5. The City shall take all steps reasonably necessary to effectuate the limitations on new connections and changes to existing connections that result in additional flows, including but not limited to putting in place a moratorium consistent with Oregon and local law during Period One of the CAP, and as necessary during Period Two of the CAP.

#### **RESTRICTIONS DURING PERIOD TWO**

6. During Period Two of the CAP, prior to approving any new connections or changes to existing connections that will result in additional flows to the WCTS, the City shall ensure that the CSTW has adequate capacity to collect, carry, transmit, and treat said increased flow, combined with the flow predicted to occur from all other existing sources, including authorized sewer service connections during both peak and normal flow conditions. In performing this analysis, the City shall utilize: (i) the evaluations undertaken in accordance with the Stress Test Work Plan and/or Stress Test Report, ii) Comprehensive Capacity Evaluations ("CCEs"), and iii) perform Connection-Specific Capacity Evaluations ("CSCEs") where appropriate. Once a CAP Limit has been established by EPA and ODEQ in accordance with the process outlined in Paragraph 10 of this Appendix, the City may approve new connections or changes to existing connections resulting in additional flow without approval by EPA and ODEQ until either the CAP Limit has been reached or new Capacity Related Violations occur as set out in Paragraph 7 of this Appendix. All ERUs added and approved Building Permits during this period must be included in the quarterly reporting under Paragraph 13 of this Appendix.
7. If Waste Discharge Limitation exceedances, sewer overflows, or bypasses in violation of the Permit have occurred, the City must demonstrate that capacity in the CSTW exists, that the violations were not due to capacity limitations, and any maintenance required to prevent future violations has been completed or they will be deemed Capacity Related Violations. If the CAP Limit has been reached or Capacity Related Violations have occurred, new connections cannot be authorized and/or added without the City demonstrating capacity exists within the CSTW and receiving approval from EPA and ODEQ. Capacity must be demonstrated by submitting a request to EPA and ODEQ providing i) CCEs as outlined in Paragraph 6 of Appendix E and ii) CSCEs as outlined in

Paragraph 14 of this Appendix. EPA and ODEQ may withhold approval of the City's request to authorize and /or add new connections or make changes to existing connections that result in additional flows under this section if the City has not: i) demonstrated capacity for additional flow and that the new connections will not lead to new violations or ii) Capacity Related Violations have already occurred.

8. The City may seek to end the requirements for Period Two of the CAP by submitting a request for review and approval to EPA and ODEQ demonstrating that the Continued Compliance Improvements identified in the Amended Wastewater System Facilities Plan, as required in Paragraph 9 of Appendix E, have been implemented, permitted, and are fully operational, and the City is in compliance with all Permit Waste Discharge Limitations. EPA and ODEQ will review the report for compliance with the requirements of this Section in accordance with Paragraphs 24-29 of the Consent Decree. Upon approval of the report by EPA and ODEQ, Period Two of the CAP will be deemed ended.

#### **TREATMENT CAPACITY EVALUATION FOR CAP LIMIT**

9. **Treatment WWTP Capacity Evaluation** – The City shall carry out a comprehensive evaluation of treatment capacities of its WWTP following completion of the 2020-2023 Wastewater Improvements<sup>1</sup> (as required by Paragraph 20 of the Consent Decree). This evaluation shall include the following:
  - a. Hydraulic and Loading Capacity Assessment – A desktop evaluation, stamped by a licensed Professional Engineer in Oregon, of the hydraulic capacity of the entire WWTP using as-built drawings, including the WWTP hydraulic profile, and field survey elevation information (as necessary). This assessment shall include a comparison of the design capacities, detention times and loading rates of each and every WWTP unit process (as modified by the immediate needs projects), to industry guidelines and benchmarks, including the Orange Book, WEF No. FD-08, and Metcalf & Eddy.
  - b. Stress Test – A Stress Test of the WWTP in accordance with the following guidance: USEPA's Peak Stress Testing Protocol Framework; Peak Wet Weather

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<sup>1</sup> Includes the 2021-2023 WWTP Immediate Needs Upgrades Project, 2021 Basins 2 and 8 Rehabilitation Project, and 2022 Basins 6 and 7 Rehabilitation Project.

Flow Stress Testing Contract No.: GS-10F-0227J; May 2015. The Stress Test shall consider the impacts of peak flows on each unit operation as well as on subsequent compliance with all permit parameters. The Stress Test shall include the following:

- i. Baseline Monitoring – Enhanced monitoring shall include during a period of typical WWTP operation, monitoring of influent and effluent for the following: 5 day biochemical oxygen demand (“BOD5”), chemical oxygen demand (“COD”), total suspended solids (“TSS”), volatile suspended solids (“VSS”), dissolved Solids, Total Kjeldahl Nitrogen (“TKN”), ammonia, Total Phosphorus, alkalinity, and pH. Enhanced operational monitoring shall include during a period of typical WWTP operation, sampling multiple times per day for the following: Mixed Liquor Suspended Solids (“MLSS”), Mixed Liquor Volatile Suspended Solids (“MLVSS”), Return Sludge Suspended Solids (“RSSS”), Sludge Volume Index (“SVI”), Return Activated Sludge (“RAS”) rate, aeration basin DO levels, and sludge blanket depths. This information shall be used to better quantify typical operating conditions as well as to refine the BioWIN and State Point modeling as described below.
- ii. Treatment train-specific flow monitoring – Installation of flow monitoring equipment as necessary as to allow the continuous monitoring of treated flow, RAS, and all other recycles within the treatment train to be used for peak flow testing.
- iii. Peak Flow/Solid Loading Rate Tests – A series of test events across a range of peak flow and solid loading rates equivalent to whole WWTP flow and load rates, including multiple tests that cover the range of hydraulic loading rates at which the WWTP has experienced bypasses during wet weather events. During each such test event, continuous monitoring of treated flow, RAS, and all other recycles within the treatment train shall be conducted, as will frequent aeration basin influent, mixed liquor, clarifier effluent and recycle monitoring. Such monitoring shall include influent and effluent BOD5, COD, TSS, VSS, Dissolved

Solids, TKN, ammonia, Total Phosphorus, alkalinity, and pH, as well as frequent operational monitoring of MLSS, MLVSS, SVI, RAS rate, aeration basin DO levels, and sludge blanket depths.

- iv. Dye testing - During at least one of the solids loading rate tests specified above, carry out slug dye testing to characterize the hydraulic characteristics of the secondary clarifier. Such testing shall employ fluorescent dye and the use of appropriate instrumentation (such as a fluorimeter) and frequent grab sampling to characterize the effluent dye concentration curve.
- c. BioWIN and Clarifier State Point modeling – Utilize the WWTP operational and performance data collected per above to validate and if necessary, calibrate the City’s WWTP BioWIN and State Point models (WEF No. FD-08), and then use those models to update the information provided in the 2021 West Yost Technical Memorandum and to characterize plant performance at flows of Max Month Wet Weather, Peak Day and Peak hour. In particular, the City shall collect data necessary to validate the BioWIN model’s default input parameters, including those for which no details were previously provided as noted in FT 3 of the 2021 West Yost Technical Memorandum, and shall monitor SVI to validate the assumption made in the State Point analysis.
- d. Based upon the results of the above, apply sound engineering judgement to identify the following WWTP capacities, consistent with ODEQ Guidelines for Making Wet Weather and Peak Flow Projections for Sewage Treatment in Western Oregon, based upon the criteria of the WWTP’s ability to remain in full compliance with its current NPDES permit:
  - i. Peak Instantaneous
  - ii. Peak Daily

Capacities may include the use of equalization to manage brief flow peaks; however, consideration of such use must assume operational strategy(s) that can actually be implemented.

10. **Treatment WWTP Capacity Evaluation Report**– The City shall submit to EPA and ODEQ by September 30, 2023, for review and approval, a report that describes and fully documents its completion of the tasks described in Paragraph 9 of this Appendix, and seeks EPA and ODEQ approval of a CAP Limit. This report shall at a minimum include the following:
- a. A detailed description of the Hydraulic Capacity Assessment carried out and its results. All as-built drawings, the hydraulic profile, and all calculations carried out shall be provided as attachments.
  - b. A tabular summary of City design criteria, selected industry guideline used.
  - c. A detailed description of each baseline and peak testing event, and a summary of all the flow and monitoring data collected during each event. For each event in which there is dye testing, a discussion of the results of that testing including the effluent dye concentration curve, shall be provided. All raw data and event operational logs/notes shall be included as attachments.
  - d. A detailed description of the BioWIN and Clarifier State Point models calibration, and a discussion of the impact of those calibrations on the model predictions of the WWTP’s peak capacities. The detailed model inputs and outputs shall be provided as attachments.
  - e. A detailed description of how the City utilized the results of the evaluations required by this section to determine the Sandy WWTP peak capacities. The report shall fully document the bases of the City’s determinations.
  - f. A description of any bypass events or compliance issues at the WTP that occurred between Consent Decree signing and the Report, and any remedial actions taken.
  - g. A CAP Limit which will be calculated as follows:
    - i. Peak Daily capacity of the upgraded WWTP (as established by the Stress Test, in MGD) minus the peak flow rate in the 5-year/24 hour storm (as simulated by the Model, in MGD) = Available Capacity in MGD.
    - ii. The CAP Limit in ERUs will be equal to Available Capacity in MGD multiplied by 1000. (CAP Limit = [Available Capacity in MGD x 1000])

EPA and ODEQ will respond to the request for approval and/or provide comments on the WWTP Treatment Capacity Evaluation Report within 45 Days of receipt in accordance with Paragraphs 24-29 of the Consent Decree. Upon approval of the report by EPA and ODEQ, the CAP Limit will be deemed established.

#### **SEEKING TO AMEND THE CAP LIMIT**

11. The City may seek to amend the CAP Limit at any time by submitting to EPA and ODEQ for review and approval a report providing evidence that capacity has been expanded in the CSTW, such as a CCE, and that there is information sufficient to determine and demonstrate a new CAP Limit can be set without future NPDES permit violations occurring, and setting forth the proposed new CAP Limit. EPA and ODEQ will make best efforts to respond in writing to approve and/or provide comments or request new information within 45 days of receipt in accordance Paragraphs 24-29 of the Consent Decree. Upon approval of the report by EPA and ODEQ, the CAP Limit will be deemed amended.

#### **EXEMPTION FOR ESSENTIAL SERVICES**

12. The City may authorize a new sewer service connection or authorize changes to existing connections that result in additional flows, even if it cannot certify that it has adequate treatment, transmission, or collection capacity, for the following:
  - a. essential services such as health care facilities, public safety facilities, public schools, and, subject to EPA/ODEQ review and approval, government and other public facilities; and
  - b. cases where a pollution or health or safety condition exists, including failed septic systems.

Any new sewer service connections, or changes to existing connections that result in additional flows, for essential services will count toward the CAP Limit in Period Two, and shall be included in quarterly reporting.

**QUARTERLY REPORTING**

- 13. The City shall submit quarterly reports of new sewer connections or changes to existing connections that result in additional flows, including the number of ERUs and how they were calculated, to EPA and ODEQ.

**CONNECTION-SPECIFIC CAPACITY EVALUATIONS (CSCEs)**

- 14. For any developments, industrial or residential, which will result in connections above 50 ERUs, the City shall conduct a connection specific capacity evaluation to ensure capacity exists in the WCTS. Capacity to collect and convey at and below the point of connection shall be evaluated for the 5-year event using the Collection System Model.

**EQUIVALENT RESIDENTIAL UNIT (ERU)**

- 15. For the purposes of the Capacity Assurance Plan, an ERU shall be assumed to generate a peak flow of 1,000 gallons per day.<sup>2</sup> For the purposes of assigning ERUs to each connection to the WCTS, the following assumptions shall be used:

Type of Use/Facility	ERUs
Single-family (incl. manufactured homes, and townhomes with three or more bedrooms)	1
Duplex (incl. manufactured homes)	2
Triplex (incl. manufactured homes)	3
Multi-family (4 or more units)	0.7 per household unit

<sup>2</sup> Based in part on the Sandy Code of Ordinances, Section 13.16.020 for average flow ERU assignment. Peak flow for residential facilities is assumed to be 4.0 times average flow as per Figure 1, Recommended Standards for Wastewater Facilities; Policies for the Design, Review, and Approval of Plans and Specifications for Wastewater Collection and Treatment Facilities 2014 Edition; A Report of the Wastewater Committee of the Great Lakes - Upper Mississippi River Board of State and Provincial Public Health and Environmental Managers Member States. Other peaking factors assigned based on expected flow variation patterns.

Accessory Dwelling Unit (“ADU”)	0.7
Room & Board Facilities	1 per 3 tenant rooms
Hotel/motel	1 per 3 rental rooms
Restaurants	1 per 8 seats
Tavern/lounges	1 per 15 seats
Food cart(s)	0.1 per cart
Hospitals/similar care facilities	1 per 3 beds
Auto service stations	1 per 6 pumps
Car washes	1 per 330 gpd predicted daily flow
Theaters and meeting venues	1 per 330 seats
Churches	1 per 260 seats
Laundromats	1 per 4 washers
Bakeries	1 per 6 employees
Mortuaries (without residence)	1 per 12 employees
Schools without showers	1 per 80 students
Schools with Showers	1 per 40 students
Colleges without residential facilities	1 per 40 students
Dormitories	1 per 6 two-person rooms
Offices	1 per 2,000 square feet
Retail	1 per 12,000 square feet



Other Commercial	1 per 333 gpd predicted flow
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16. Industrial users and high-volume/high-strength dischargers (collectively, IUs) shall be assigned ERUs based upon predicted wastewater flow volume, patterns and strength as follows:

Assigned Flow ERUs = Higher of average or peak flow ERU value, where:

- Average flow ERUs = Predicted average facility discharge volume, gpd ÷ 250 gpd
- Peak flow ERUs = Predicted daily peak flow rate, gpd ÷ 1,000 gpd

If the IUs' waste is expected to have strength characteristics different than typical sanitary sewage, the impact of its wastewater on the WWTP shall also be evaluated based upon the expected average and maximum monthly loadings of BOD5 and maximum day loadings of TSS on the aeration basins and the final clarifiers following the addition of the proposed IU connection, as compared to the benchmarks identified in accordance with Paragraph 9.a. of this Appendix.

This evaluation shall at a minimum consider: i) aeration basin organic loading (pounds BOD5 per day per 1000 cubic feet of aeration basin capacity), aeration basin F/M ratio (pounds BOD5 per day per pound MLVSS), both at Maximum Monthly conditions; and ii) secondary clarifier peak hourly surface overflow rate (in gallons per day per square foot of clarifier surface area).

17. References

“Orange Book” refers to the Criteria for Sewage Works Design manual, publication number 98-37 (revised January 2022), Department of Ecology, State of Washington.

“WEF No. FD-08” refers to Clarifier Design: WEF Manual of Practice No FD-08.

“Metcalf & Eddy” refers to Wastewater Engineering: Treatment and Resource Recovery, Metcalf & Eddy, 5<sup>th</sup> Edition.

“2021 West Yost Technical Memorandum” refer to the February 22, 2021 West Yost Technical Memorandum, Sandy WWTP Secondary Process Evaluation

**APPENDIX E**

**AMENDED WASTEWATER SYSTEM FACILITIES PLAN REQUIREMENTS**

1. In compliance with Paragraph 22 of the Consent Decree, an Amended Wastewater System Facilities Plan, consistent with the guidelines “Preparing Wastewater Planning Documents and Environmental Reports for Public Utilities,” and the requirements of the State Revolving Fund, shall be submitted for review and approval to EPA and ODEQ. The Amended Wastewater System Facilities Plan shall propose alternatives to bring the City into compliance, and ensure continued compliance, with the terms and conditions of the Permit. A schedule for completion of CSTW improvements shall be included in the Plan. The Amended Wastewater System Facilities Plan shall comply with the requirements of this Appendix.
2. The Amended Wastewater System Facilities Plan shall include an evaluation of the capacity increases that have been achieved in the CSTW thus far, either through plant improvements (based on performance during wet weather events that have occurred in 2022) or infiltration and inflow (“I&I”) reductions, and how they compare to the results anticipated in the 2019 Facilities Plan and 2021 WWTP Preliminary Design Report. This evaluation shall include a review and evaluation of data collected from the completed I&I reduction work in the Basins, to determine if the type and extent of work carried out there achieved the anticipated/desired level of I&I reductions.
3. Wet season rainfall and flow monitoring program – The City shall carry out a wet season (November 1 to April 30) rainfall and flow monitoring program to collect the data necessary to support validation or as necessary recalibration of its Collection System Model in accordance with CIWEM 2017. Monitoring shall consist of the following:
  - a. Rainfall monitoring – The City shall install and operate a minimum of 3 automatic recording/telemetered rainfall gauges. Such gauges shall be capable of measuring 0.01 inches of rainfall and shall be distributed to characterize local rainfall patterns. The rainfall gauges shall be installed in locations throughout the system to provide representative rainfall data, and operated, and maintained in accordance with the gauge manufacturers’ recommendations.
  - b. Flow Monitoring – The City shall install and operate a network of flow monitors and level sensors to facilitate its evaluation of the effectiveness of its Rainfall

Derived Infiltration and Inflow (“RDII”) reduction efforts and to support the development, validation, and recalibration of its Collection System Model.

- i. Flow monitors shall be telemetered Area/Velocity ("A/V") meters capable of the following: Consistently providing accurate and reliable monitoring data. At a minimum, velocity, depth, and flow shall be accurately measured and recorded, under both open channel and surcharged conditions, and shall be recorded in at most 5-minute intervals. The equipment must allow the collection of data remotely via cellular telemetry.
  - ii. Level sensors shall also be telemetered.
  - iii. Both A/V meters and level sensors shall be capable of measuring surcharge depths above the pipe invert to the manhole rim.
  - iv. Flow meters and level sensors shall be installed in locations throughout the system to provide representative flow data and to monitor each individual sewer basin’s flow rates as well as to support successful model development, calibration, and validation.
  - v. Flow meters shall be operated, and maintained in accordance with manufacturer recommendations.
- c. Data QA/QC – The City shall implement QA/QC practices, consistent with industry standards in Section 3 of CIWEM 2017 and the WRc Guide to Short Term Flow Surveys in Sewers (1987), including weekly data reviews, consistent data qualification procedures and consistent and complete QC documentation protocols.
- d. Data collection will be considered sufficient for proceeding with Collection System Modeling if the following conditions are met:
- i. Flow monitoring and rainfall collection must continue through at least February 28, 2023.
  - ii. Flow and rainfall observations are recorded, reviewed, deemed acceptable quality, and 95% complete during at least one or both of the following:

1. At least one storm with 72-hour rainfall in exceedance of the 1.17-year storm (2.75 inches in 72 hours), AND at least 2 other storms with 2.0 inches in 72 hours (1.08-year frequency); or
  2. Plant flows exceed flows of 6 MGD at least once, and exceed 4 MGD at least two times.
4. Collection System Model Development/Validation/Recalibration – The City shall develop and maintain a calibrated hydrologic/hydraulic model of its WCTS (“the Collection System Model”) to establish existing system wet weather response and hydraulic conditions and limitations and to support implementation of the CAP. The Collection System Model shall be configured, calibrated, and verified in accordance with current good industry practice, as per CIWEM 2017, and shall:
- a. Accurately predict the hydrologic response of each Basin to an appropriate range of wet weather events by each of the City’s ten individual sewer basins. At a minimum, the following precipitation events shall be considered:
    1. OR 5-year 24 hour storm
    2. OR 5-year 6 hour storm with Atlas 14 first quartile distribution
  - ii. Accurately predict flow rate and hydraulic grade line (“HGL”) of wastewater in all portions of the collection system explicitly represented in the Collection System Model in storm events including those listed above in Paragraph 4.a.;
  - iii. Accurately predict surcharge and releases (e.g., Sanitary Sewer Overflows) in all portions of the collection system explicitly represented in the Collection System Model;
  - iv. Utilize dynamic wave routing, including representative simulation of downstream backwater impacts on upstream flows and HGLs; and
  - v. Support accurate analysis of alternative measures for addressing capacity limitations.
- b. Collection System Model configuration/calibration/verification
- i. The Collection System Model shall be configured based upon accurate hydrologic and collection system attribute information, including that

taken from as-built drawings and as necessary, acquired through field survey activity.

- ii. Dry weather and wet weather calibration shall be carried out using the validated data collected in the monitoring program described in Paragraph 3 above. Calibration shall be carried out in accordance with current good industry practice and the criteria presented in Table 5-1 from the CIWEM 2017. In particular, the following wet weather calibration criteria will be applied:

*Table 5-1 Storm Verification Targets*

Parameter	General	Critical Locations	Comments
Shape	Good match (NSEC if used >0.5)	Good match (NSEC if used >0.5)	An evaluation technique may be used to compare the shape such as the Nash-Sutcliffe Efficiency Co-efficient (NSEC) method together with a visual check. More information on this approach is included in <b>Appendix G</b>
Time of peaks and troughs	±0.5 hour	±0.5 hour	The timing of the peaks and troughs should be similar having regard to the duration of the event
Peak depth (un-surcharged)	±0.1m or ±10% whichever is greater	±0.1m	
Peak depth (surcharged)	+0.5m to - 0.1m	±0.1m	Relaxation may be appropriate in deep sewers. Where coupled 1D-2D models are used the 'critical locations' criteria should apply
Peak flow	+ 25% to -15%	±10%	
Flow volume	+20% to -10%	±10%	Excluding poor / missing data

- iii. Collection System Model documentation: Fully document configuration, attribute data, initial and final calibration parameters, and calibration performance. Last to include 45-degree scatterplots of individual event peak flow rate and peak depth and total volume for each calibration point.
5. The City shall provide a report to EPA and ODEQ that describes in detail rainfall monitoring, flow monitoring, Collection System Model development and the calibration process, and that at a minimum includes:
- a. Rainfall monitoring – The report shall describe the location and type of each rain gauge employed to collect rainfall data during the monitoring period. The

methodology used to review and qualify rainfall data shall be described, data excluded from use due to quality issues identified, and the results of the data review shall be summarized in a chart like the attached Example 1. Both raw and edited rainfall data shall be provided in a spreadsheet as attachments.

- b. Flow monitoring - The report shall describe the location and type of each flow monitoring installation used to collect flow and HGL data during the monitoring period. The methodology used to review and qualify depth and velocity data shall be described, data issues at each meter location discussed, data excluded from use due to quality issues identified, and the results of the data review shall be summarized in a chart like the attached Example 1. Site installation sheets and scatterplots of all dry and wet weather data shall be provided as an attachment.
- c. Collection System Model software – The report shall identify all software (including versions) utilized, and if not widely utilized within the industry for collection system modeling, shall provide information regarding the capabilities and limitations of that software.
- d. Collection System Model configuration – The report shall describe how all hydrologic processes are represented in the model and shall provide as appendices all initial and final hydrologic parameters. The report shall also describe and illustrate with map(s) and/or schematics, all portions of the system explicitly included in the hydraulic model and shall include as appendices all attribute data input to the model.
- e. Collection System Model calibration and verification – The report shall describe in detail the dry and wet weather calibration processes and rainfall/flow monitoring data utilized, the calibration criteria employed (as per the CIWEM 2017) and the calibration results achieved. The report shall provide:
  - i. A discussion of the overall calibration achieved, limitations of the model and recommendations for future model refinement;
  - ii. Specifically identify each dry weather and wet weather calibration or verification period and shall describe why each such period was selected;
  - iii. Summary tables of calibration and verification peak flow, peak depth, and total event volume model-to-meter statistics;

- iv. For each calibration location/meter -45-degree calibration/verification peak flow, peak depth, and total event volume scatterplots; and
  - v. For each calibration location/meter, calibration/verification meter-to-model comparative hydrographs.
- 6. Comprehensive Capacity Evaluation. As part of the Amended Wastewater System Facilities Plan, the City shall conduct a Comprehensive Capacity Evaluation (“CCE”). The CCE shall be carried out to evaluate and document the then-current peak wet weather capacity of the Sandy collection system and the peak wet weather and longer-term capacities of the Sandy wastewater treatment plant. This will be achieved by a combination of monitoring, modeling, and engineering analyses as described in detail below:
  - a. The CCE shall, at a minimum, consist of the following activities:
    - i. Wet season rainfall and flow monitoring program in Paragraph 3 of this Appendix;
    - ii. Collection System Model Validation/Recalibration in Paragraph 4 of this Appendix;
    - iii. Collection System Model Capacity Evaluation. The City shall carry out a series of simulations to identify any portions of the collection system with inadequate conveyance capacity. For this evaluation, inadequate capacity will be any sewer predicted to surcharge to within 3-feet of the ground surface or would be expected to result in a backup to private property based on expected lowest fixture elevations. This evaluation shall consist of two steps:
      - a. First, the City shall use the model to simulate the performance of the existing system during the OR 5-year Storm and shall identify any portions of the collection system with inadequate conveyance capacity. If any such portions are identified, those portions shall be deemed to have no additional capacity for new connections until measures are completed to increase that capacity.
      - b. The City shall then simulate increased base flow in the portions of the interceptors and main trunk sewers with adequate conveyance capacity

to identify how much additional flow is required to reach inadequate conveyance capacity conditions in that same OR 5-year storm event.

The City shall identify the additional baseflow capacity in gallons per day rate for each interceptor and main trunk sewer and provide that information on a sewer map.

- iv. Collection System Record Review and Evaluation. The City shall carry out a review of the last three years of its collection system complaints and maintenance records, to identify all instances of capacity-related overflow or private property backup. For each such instance identified, the City shall provide an evaluation of how the responsible precipitation event compared to the OR 5-year event.
  - v. Treatment Plant Capacity Evaluation in Paragraph 9 of Appendix D;
  - vi. Integrated WCTS and WWTP Evaluation and Identification of Currently Available Capacity
    - a. The City shall utilize the results of the evaluations and analyses described in subparagraphs i-v above, to identify the available additional baseflow capacity for the WWTP and for each portion of the specified interceptors and main trunk sewers.
7. Subsequent CCEs shall be carried out and Reports submitted following the completion of significant collection system or WWTP projects implemented by the City to address specific capacity limitations and to support the submission of requests by the City for increase in the CAP connection limitation(s).
8. Permit Compliance. The Amended Wastewater System Facilities Plan shall include an evaluation of the City's expected compliance with the Permit, including Capacity Related Violations, to be conducted for both current conditions and with anticipated growth over the next 10 years.
9. The Amended Wastewater System Facilities Plan shall include a set of improvements identified as "Continued Compliance Improvements." "Continued Compliance Improvements" shall mean improvements which when completed, and permitted, will allow for sufficient capacity to collect, treat, and discharge to meet permit requirements,



including discharge limitations during peak flow, for at least ten years, including expected population growth through the tenth year.

10. Alternatives. Utilizing all of the above information, as well as data on predicted population growth over the next 20 years, the City shall conduct an evaluation of all viable alternative measures to improve capacity in the WCTS and WWTP, including both short-term and long-term improvements to address increased flow, to ensure compliance with the terms and conditions of the Permit, and shall at a minimum include consideration of the following measures:

- (1) Expansion of current tertiary treatment configurations (additional aeration basin, clarifier), and tertiary filtration;
- (2) Converting the existing plant to a Membrane BioReactor System (“MBR”);
- (3) Hybrid installation of an MBR train at the existing plant, and conversion of the existing aeration basin, secondary clarifier and tertiary filtration train to wet weather operation only;
- (4) Pumping wastewater to adjacent treatment facility;
- (5) Detention in a new pump station and equalization basin, or within the existing collection system by limited surcharging;
- (6) Satellite MBR concept.
- (7) Any other temporary or permanent measures the City wishes to consider.

## 11. References

“CIWEM 2017” refers to



**Code of Practice for the Hydraulic Modelling of Urban Drainage Systems 2017.**

[www.ciwem.org/groups/udg](http://www.ciwem.org/groups/udg)



## Staff Report

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**Meeting Date:** June 5, 2023

**From** AJ Thorne, Assistant Public Works Director

**SUBJECT:** Gunderson and Highway 211 Intersection Improvements

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**DECISION TO BE MADE:**

Whether to authorize the City Manager to sign a contract with Harper, Houf, Peterson, and Righellis for design of intersection improvements at Highway 211 and Gunderson Road.

**BACKGROUND / CONTEXT:**

The City entered into a development agreement as part of the development of the Shaylee Meadows subdivision. The agreement included a \$500,000 contribution from the developer toward intersection improvements at Highway 211 and Gunderson Road. The current speeds on Highway 211 combined with increasing traffic as development occurs in this area has led this intersection to become one of the higher priorities for improvements along Hwy 211 within Sandy's jurisdiction. Traffic and pedestrian safety will be a main focus of this project.

**KEY CONSIDERATIONS / ANALYSIS:**

Recently DKS performed an analysis of the intersection which suggested that a roundabout for the intersection of 211 and Gunderson would be the ideal solution. The design project executed by this contract will begin with an alternatives analysis exploring the factors of traffic ratings, safety, constructability/construction timing, and cost analysis. Additionally, this project will provide a speed study for the corridor, which will start the process of lowering the speed limit on Highway 211 within Sandy's city limits.

The Gunderson intersection improvement project will determine a path forward and provide a shovel ready design for this intersection. When a alternative is selected and a cost estimate provided, Sandy will be able to move forward with the next steps. Most importantly, early stages of work in this project will allow the City to seek and secure funding for the construction of this intersection improvement concurrently with the design work.

**RECOMMENDATION:**

Authorize the City Manager to sign the attached agreement with Harper, Houf, Peterson and Righellis for design of intersection improvements at Highway 211 and Gunderson Road.

**BUDGETARY IMPACT:**

The proposed project has a base total of \$446,023 and a contingency budget of \$74,433 for a total of \$ 520,456. The contingency budget is generally based around environmental permitting requirements and is not likely to be required during this project. The base total will be paid for using the developer's \$500,000 contribution, which currently has a balance of \$483,436.25.

**SUGGESTED MOTION LANGUAGE:**

"I move to authorize the City Manager to sign the agreement with Harper, Houf, Peterson, and Righellis for design of intersection improvements at Highway 211 and Gunderson Road, as included in the agenda packet."

**LIST OF ATTACHMENTS/EXHIBITS:**

- Contract with HHPR
- HHPR Scope of Services
- HHPR Fee Schedule
- Gunderson/211 RFQ
- DKS Improvement Study: Gunderson/211

# PROFESSIONAL SERVICES AGREEMENT

## PREAMBLE

This Contract, made and entered into this \_\_\_\_\_ day of \_\_\_\_\_, 2023, by and between Harper, Houf, Peterson, Righellis, Inc. hereinafter called "Contractor", and the CITY OF SANDY, a municipal corporation of the state of Oregon, hereinafter called "City".

WHEREAS, City has need for the services of a party with the particular training, ability, knowledge and experience possessed by Contractor.

## WITNESSETH:

The parties hereto mutually covenant and agree to and with each other as follows:

### 1. SCOPE OF WORK

The scope of work, is contained in Exhibit A attached hereto and by this reference made a part hereof.

This contract shall supersede any prior representation or contract, written or oral. This contract shall not be subject to modification or amendment except in writing, executed by both parties.

### 2. DURATION OF CONTRACT

Unless earlier terminated or extended, this contract shall remain in force and effect from the date in the preamble above through June 30, 2025.

### 3. PAYMENT

City agrees to pay, and Contractor agrees to accept, in full payment for the performance of this contract, according to the fee schedule in Exhibit A attached hereto and by this reference made a part hereof. The fee schedule in Exhibit A may be adjusted annually upon mutual agreement of the parties to reflect inflation and changes in labor and materials costs.

### 4. CHANGES

This contract and any substantive changes to the scope of work or changes to the contract

costs will not be effective until approved in writing by the City.

**5. INDEPENDENT CONTRACTOR STATUS**

Contractor agrees and certifies that:

- A. Contractor is engaged as an independent contractor and will be responsible for any federal or state taxes applicable to payment under this contract;
- B. Contractor will not, on account of any payments made under this contract, be eligible for any benefit from federal social security, workers' compensation, unemployment insurance, or the Public Employee's Retirement System, except as a self-employed individual;
- C. Contractor is not currently an employee of the federal government or the state of Oregon;
- D. Contractor is not a contributing member of the Public Employees' Retirement System;
- E. Contractor certifies it meets the specific Independent Contractor Standards of ORS 670.600;
- F. Contractor is not an "officer, employee or agent" of City as those terms are used in ORS 30.265.

**6. SUBCONTRACTS AND ASSIGNMENT; SUCCESSORS IN INTEREST**

Contractor shall not enter into any subcontracts for any of the work required by this contract, excepting those portions of the work specifically described in Exhibit A or assign or transfer any of its interest in this contract without the prior written consent of City. The provisions of this contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective successors and assigns, if any.

**7. PAYMENT OF LABORERS**

- A. Contractor shall:
  - (1) Make payment promptly, as due, to all persons supplying to Contractor labor or material for the prosecution of the work provided for in this contract;
  - (2) Pay all contributions or amounts due the Industrial Accident Fund incurred

in the performance of this contract;

- (3) Not permit any lien or claim to be filed or prosecuted against City on account of any labor or material furnished; and
- (4) Pay to the Department of Revenue all sums withheld from employees pursuant to ORS 316.167.

- B. If Contractor fails, neglects or refuses to make prompt payment of any claim for labor or services furnished to it by any person in connection with this contract as such claim becomes due, City may pay such claim to the person furnishing the labor or services and charge the amount of the payment against funds due or to become due to Contractor by reason of such contract.
- C. The payment of a claim in this manner shall not relieve Contractor or Contractor's surety from obligation with respect to any unpaid claims.

**8. PAYMENT FOR MEDICAL CARE AND PROVIDING WORKERS' COMPENSATION**

Contractor shall promptly, as due, make payment to any person, co-partnership, association or corporation furnishing medical, surgical and hospital care or other needed care and attention, incident to sickness or injury, to the employees of Contractor, of all sums which Contractor agrees to pay for such services and all moneys and sums which Contractor collected or deducted from the wages of employees pursuant to any law, contract or agreement for the purpose of providing or paying for such service.

Contractor, its subcontractors, if any, and all employers working under this contract are subject employers under the Oregon Workers' Compensation Law and shall comply with ORS 656.017, which requires them to provide workers' compensation coverage for all their subject workers.

**9. OVERTIME AND HOLIDAYS**

Persons employed by Contractor under this Personal Services Contract shall receive at least time and a half pay for work performed on the following legal holidays:

- A. New Year's Day on January 1
- B. Memorial Day on the last Monday in May
- C. Independence Day on July 4
- D. Labor Day on the first Monday in September
- E. Thanksgiving Day on the fourth Thursday in November
- F. Christmas Day on December 25

and for all overtime worked in excess of forty [40] hours in any one week, except for individuals who are excluded under ORS 653.101 to 653.261 or under 29 U.S.C., Sections 201 to 209, from receiving overtime.

**10. TIME LIMITATION ON CLAIM FOR OVERTIME**

Any worker employed by Contractor shall be foreclosed from the right to collect for any overtime under this contract unless a claim for payment is filed with Contractor within ninety [90] days from the completion of the contract, providing Contractor has:

A. Caused a circular clearly printed in blackface pica type and containing a copy of this section to be posted in a prominent place alongside the door of the timekeeper's office or in a similar place which is readily available and freely visible to any or all workers employed on the work; and

B. Maintained such circular continuously posted from the inception to the completion of the contract on which workers are or have been employed.

**11. ERRORS**

Contractor shall perform such additional work as may be necessary to correct errors in the work required under this contract without undue delays and without additional cost.

**12. DEFAULT**

City, by written notice of default (including breach of contract) to Contractor, may terminate the whole or any part of the contract:

A. If Contractor fails to provide services called for by this contract within the time or in the manner specified herein, or any extension thereof; or

B. If Contractor fails to perform any of the other provisions of this contract, or so fails to pursue the work as to endanger performance of this contract in accordance with its terms, and after receipt of written notice from City, fails to correct such failures within ten [10] days or such longer period as City may authorize.

Upon termination, City will pay Contractor for only the value to City of work actually performed. The rights and remedies of City provided in the above clause related to defaults (including breach of contracts) by Contractor shall not be exclusive, and are in addition to any other rights and remedies provided by law or under this contract.

**13. OWNERSHIP OF WORK**

All work products of Contractor, including background data, documentation and staff work that is preliminary to final reports, which result from this contract are the exclusive property of City. If this contract is terminated by either party or by default, City, in addition to any other rights provided by this contract, may require Contractor to transfer and deliver such partially completed reports or other documentation that Contractor has specifically developed or specifically acquired for the performance of this contract.

**14. INDEMNITY AND HOLD HARMLESS**

Contractor shall defend, indemnify and hold City, its officers, agents and employees, harmless against all liability, loss or expenses, including attorney's fees, and against all claims, actions or judgments based upon or arising out of damage or injury (including death) to persons or property caused by any negligent act or omission of an act sustained in connection with the performance of this contract or by conditions created thereby, or based upon violation of any statute, ordinance or regulation.

With respect to the professional services Contractor will provide to City, to the fullest extent permitted by law, the Contractor agrees to indemnify and hold the City, its officers, agents and employees, harmless from and against liabilities, loss or expenses, including reasonable attorney's fees, to the extent caused by the negligence of the Contractor in the performance of services under this Agreement. In no event shall the indemnification obligation extend beyond the date when the institution of legal or equitable proceedings for professional negligence would be barred by an applicable statute of repose or statute of limitations.

**15. INSURANCE**

Contractor shall obtain, prior to the commencement of the contract, and shall maintain in full force and effect for the term of this contract, at Contractor's expense, an automobile liability insurance policy for the protection of Contractor and City, its officers, boards, commissions and employees. This policy shall be issued by a company authorized to do business in the state of Oregon, protecting Contractor or subcontractors or anyone directly or indirectly employed by either of them against liability for the loss or damage of personal and bodily injury, contractual liability, death and property damage, and any other losses or damages above mentioned in the combined single limit of \$1,000,000 or the limit of public liability contained in ORS 30.260 to 30.300, whichever is greater. The insurance company shall provide City with an endorsement thereto naming City as an additional insured, providing that no acts on the part of the insured shall affect the coverage afforded to the above policy, and providing City will receive thirty [30] days' written notice of cancellation or material modification of the insurance contract.



Contractor will not perform any work under this contract until City has received copies of applicable insurance policies or acceptable evidence that appropriate insurance heretofore mentioned is in force.

**16. STANDARD OF WORK**

Contractor will accomplish the work using a standard of performance and care that is currently accepted by other professionals engaged in similar work in the Portland metropolitan area.

**17. TERMINATION**

This contract may be terminated by mutual consent of the parties, or by City at any time by giving written notice to Contractor no later than fifteen [15] days before the termination date. Contractor shall be entitled to compensation for services performed up to the date of termination.

**18. CONFIDENTIALITY**

No reports, information and/or data given to or prepared or assembled by Contractor under this contract shall be made available to any individual or organization by Contractor without the prior written approval of City.

**19. PUBLICATION RIGHTS / RIGHTS IN DATA**

All publication rights in the product produced by Contractor in connection with the work provided for under this contract, whether in preliminary draft or final form, shall be vested in City.

Contractor shall not publish any of the results of the work without the prior written permission of City.

All original written material and other documentation, including background data, documentation and staff work that is preliminary to final reports, originated and prepared for City pursuant to this contract, shall become exclusively the property of City. The ideas, concepts, know-how or techniques relating to data processing development during the course of this contract by Contractor or City personnel, or jointly by Contractor and City personnel, can be used by either party in any way it may deem appropriate.

Material already in Contractor's possession, independently developed by Contractor outside the scope of this contract or rightfully obtained by Contractor from third parties, shall belong to Contractor. However, Contractor grants to City a non-exclusive, irrevocable and royalty-

free license to use such material as it sees fit.

This contract shall not preclude Contractor from developing materials which are competitive, irrespective of their similarity to materials which might be delivered to City pursuant to this contract in developing materials for others, except as provided in this section.

**20. ACCESS TO RECORDS**

Contractor agrees that City and its authorized representatives shall have access to the books, documents, papers and records of Contractor which are directly pertinent to the specific contract for the purpose of making audit, examination, excerpts and transcripts.

**21. ATTORNEY'S FEES**

If a suit or action is filed to enforce any of the terms of this contract, the prevailing party shall be entitled to recover from the other party, in addition to costs and disbursements provided by statute, any sum which a court, including any appellate court, may adjudge reasonable as attorney's fees.

**22. COMPLIANCE WITH APPLICABLE LAW**

Contractor shall comply with all federal, state and local laws and ordinances applicable to the work under this contract, including, without limitation, the provisions of ORS 279.312, 279.314, 279.316, 279.320 and 279.555. Without limiting the generality of the foregoing, Contractor expressly agrees to comply with:

- A. Title VI of the Civil Rights Act of 1964;
- B. Section V of the Rehabilitation Act of 1973;
- C. The Americans with Disabilities Act of 1990 (Pub L No. 101-336), ORS 659.425, and all regulations and administrative rules established pursuant to those laws; and
- D. All other applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations.

**23. FOREIGN CONTRACTOR**

If Contractor is not domiciled in or registered to do business in the state of Oregon, Contractor shall promptly provide to the Oregon Department of Revenue and the Secretary of State Corporation Division all information required by those agencies relative to this contract. Contractor shall demonstrate its legal capacity to perform these services in the state of Oregon prior to entering into this contract.

**24. GOVERNING LAW; JURISDICTION; VENUE**

This contract shall be governed and construed in accordance with the laws of the state of Oregon without resort to any jurisdiction's conflict of laws, rules or doctrines. Any claim, action, suit or proceeding (collectively, "the claim") between City (and/or any other agency or department of the state of Oregon) and Contractor that arises from or relates to this contract shall be brought and conducted solely and exclusive within the Circuit Court of Clackamas County for the state of Oregon. Provided, however, if the claim must be brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. Contractor, by the signature below of its authorized representative, hereby consents to the *in personam* jurisdiction of said courts.

**25. FORCE MAJEURE**

Neither City nor Contractor shall be held responsible for delay or default caused by fire, riot, acts of God, or war where such cause was beyond, respectively, the reasonable control of City or Contractor. Contractor shall, however, make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon the cessation of the cause, diligently pursue performance of its obligations under this contract.

**26. MERGER CLAUSE**

THIS CONTRACT AND ATTACHED EXHIBITS CONSTITUTE THE ENTIRE AGREEMENT BETWEEN THE PARTIES. NO WAIVER, CONSENT, MODIFICATION OR CHANGE OF TERMS OF THIS CONTRACT SHALL BIND EITHER PARTY UNLESS IN WRITING AND SIGNED BY BOTH PARTIES. SUCH WAIVER, CONSENT, MODIFICATION OR CHANGE, IF MADE, SHALL BE EFFECTIVE ONLY IN THE SPECIFIC INSTANCE AND FOR THE SPECIFIC PURPOSE GIVEN. THERE ARE NO UNDERSTANDINGS, AGREEMENTS, OR REPRESENTATIONS, ORAL OR WRITTEN, NOT SPECIFIED HEREIN REGARDING THIS CONTRACT. CONTRACTOR, BY SIGNATURE OF ITS AUTHORIZED REPRESENTATIVE, HEREBY ACKNOWLEDGES THAT HE/SHE HAS READ THIS CONTRACT, UNDERSTANDS IT, AND AGREES TO BE BOUND BY ITS TERMS AND CONDITIONS.

**27. EXECUTION AND COUNTERPARTS**

This contract may be executed in several counterparts, each of which shall be an original, all of which shall constitute but one and the same instrument.

**CONTRACTOR**

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Signature)

By: \_\_\_\_\_

Title: \_\_\_\_\_

\_\_\_\_\_, 2023  
Date

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Business Address

Individual S.S.N. or  
Employer ID #: \_\_\_\_\_

- Check one:
- Sole Proprietor
  - Partnership
  - Corporation
  - Governmental
  - Non-Profit

CITY OF SANDY

By:

\_\_\_\_\_  
Tyler Deems  
Interim City  
Manager  
City of Sandy  
39250 Pioneer Blvd.  
Sandy, OR 97055

Date: \_\_\_\_\_, 2023

# Exhibit A

## City of Sandy



### Scope of Services

For

**Highway 211 / Gunderson Road Intersection Project**

May 22, 2023

City of Sandy, Oregon  
Engineering Department  
39250 Pioneer Boulevard  
Sandy, OR 97055  
(503) 668-7449

## Schedule

Subject to change if it is in the City's best interest.

A. Initial Submittal of Contract by HHPR	3.15.2023
B. Contract Negotiations with City	3.16.23 to 5.22.23
C. City Council Approval	6.5.2023
D. Notice of Award	6.6.2023
E. Commencement of Engineering Contract	6.12.2023
F. Survey, Field Investigations, and Permitting	7.1.2023 to 2.29.2024
G. Property Acquisition	8.1.2023 to 02.29.2023
H. Construction Document Preparation	8.1.2023 to 3.31.2024
I. Advertise for Bids	3.02.2024
J. Substantial Completion of Construction	03.01.2025

## Introduction

The intersection of Highway 211 and Gunderson Road is located within the City of Sandy, approximately 1.25 miles south of the intersection of US 26 and Highway 211. Current and future developments will lead to a need for a traffic solution at the intersection as future usage of the arterial will exacerbate an already dangerous stretch of the roadway.

The need for an intersection improvement is identified in Sandy's Transportation System Plan (TSP). As the TSP did not prescribe the method of improvement, DKS Associates (at the City of Sandy's request) performed an analysis which determined that a single-lane roundabout is an optimal solution at this location. DKS's report made the following intersection improvement recommendations:

- Construct a single-lane roundabout at Gunderson Road to provide adequate capacity to accommodate future growth and reduce vehicle speeds on Highway 211.
- With future development, extend Cascadia Village Drive west to serve as the fourth leg of the Highway 211/Gunderson Road intersection.
- Close the Ponder Lane approach to Highway 211/Arletha Court.
- Prohibit northbound left turn movements at Highway 211/Arletha Court.
- Conduct a speed study on Highway 211 to set the appropriate posted speed.

The main goal of this project is to construct intersection improvements at the intersection of Hwy 211 and Gunderson Road. This intersection improvement design will plan for the future fourth leg but will not complete design or plan to construct it with this project. Additionally, we will work with ODOT to conduct a speed study on Highway 211, and complete closure of the Ponder Lane approach once the roundabout connection is established. The other two recommendations (to add a fourth leg to the intersection and prohibit northbound left turn movements at Highway 211/Arletha) will be part of a future project, likely funded by development.

Initial design will consist of a thorough alternatives analysis of the intersection, HHPR will evaluate site considerations such as impacts to sensitive environmental areas and habitat, impacts to adjacent properties, earthwork quantities, retaining walls, budget, timelines, safety and potential interim solutions in preparation of preliminary intersection alignment options for City review.

HHPR will make recommendations for pedestrian walkways, crosswalks and accompanying safety devices to be incorporated into the project. Additionally, the project will include ADA compliancy, street lighting, storm quantity/quality, and landscaping.

### **Project Critical Path Elements**

It is critical that the topographic survey, geotechnical investigation, and traffic analysis will be started in June 2023 or as soon as possible after the contract is approved. This data will be necessary to determine the optimum intersection location and road alignments. This will enable the preliminary 30% design to be completed. Immediately following the completion and City acceptance of the 30% design, the right-of-way acquisition and permitting process will begin with environmental agencies. Obtaining permits and right-of-way in a timely and efficient manner is paramount as these need to be in place prior to advertising the project for bid. We are fully aware of the sensitivity of these critical path elements as they are the main driving force that will keep the project on schedule.

### **Scope of Work**

#### **Task 1 – Project Management**

##### **A. Notice to Proceed**

Once HHPR receives Notice to Proceed from the City, they will contact all subconsultants to authorize them to commence work. HHPR will prepare and execute all subconsultant contracts.

##### **B. Project Administration**

HHPR will manage the project with foresight and work closely with the City, other permitting agencies, and utility purveyors throughout the project duration. Close and continual attention to the project's schedule and budget will be paramount and will be our team's focus to keep the project on track and to ensure a successful project outcome. Coordination and communication will take place via in-person and digital meetings, phone conversations, e-mail, and teleconferences. HHPR will prepare monthly invoices and percentage of work tasks completed to date.

##### **C. Kickoff Meeting and Project Overview**

Initiate the project design kickoff meeting. Consultant shall prepare an agenda and materials for the kickoff meeting, invite necessary attendees, collect data, and discuss the project schedule. Initial kickoff meeting will include the City's public information consultant. Appropriate HHPR team members will be in attendance (see deliverable below).

##### **D. Coordination Meetings**

Consultant shall organize and coordinate virtual (Microsoft Teams) meetings between the Consultant Team and appropriate City personnel to review project progress, discuss project challenges and findings, and review early study results. Meetings will be held approximately every two weeks, or more frequently as needed. Consultant shall ensure that the City personnel and Consultant team members maintain a shared understanding regarding study



direction, objectives, and deliverables. HHPR will hold internal team coordination meetings as necessary.

**E. Public Involvement Meetings**

The project will require public outreach. Anticipated public information meetings include one public meeting during the design phase at a time to be determined by the City and HHPR. The HHPR team will provide support via attendance and presentation materials at the open house. Appropriate HHPR team members will be in attendance.

**F. Utility Coordination**

Following initial survey, utility coordination will begin with utility purveyors in the area. As with most roadway projects, we understand it is desirable for agencies to install facilities as part of the project where existing utilities do not exist. This is an important aspect to the project, and we have identified the following tasks.

- **Utility Identification and Location.** Prepare a utility contact list and coordinate with all existing utilities to verify presence within the project area, obtain available system mapping information, and determine the need for new infrastructure throughout the project corridor. Coordinate with affected utilities to determine prior and/or future rights and utility easement limits within the project area.
- **Identify Utility Conflicts and Estimate Potential Costs.** Coordinate with the project design team to identify potential conflicts. Evaluate conflicts in light of reimbursable status and coordinate with affected utilities to estimate the potential City costs associated with required relocations. Provide a summary of estimated utility conflicts and costs with the 30% design.
- **Utility Conflict Notification and Coordination.** Provide a Conflict Letter (1st notice) to each affected utility outlining identified conflicts and steps forward. Coordinate with the utilities and project design team to avoid conflicts or relocate utilities as necessary. Hold up to three (3) utility coordination meetings with all affected utilities virtually and/or on-site. When each utility's relocation plan has been approved by the project team we will provide each utility with a Timing Requirements Letter (second notice).
- **Communication and Coordination.** Provide a complete copy of available preliminary and final plans to each utility within the project area. Coordinate with utilities to identify any changes and address any additional conflicts or necessary adjustments.
- **Illumination Coordination with PGE.** Lighting circuit power feed design to be performed by PGE. City will furnish list of approved streetlight materials (poles, luminaires, photocells, etc.) Consultant shall submit information packet to PGE and coordinate PGE plans with the project team.

***Task 1 Deliverables:***

- Agendas, minutes and materials for all meetings
- Attendance at meetings:
  - Initial kick-off meeting with City: HHPR Project Manager and Natural Resource Scientist, DKS Associates Project Manager, Geotechnical Lead, and EPIC Right-of-Way Lead. 3 hour duration is anticipated including travel. (Virtual meeting is also an option)
  - Virtual coordination meetings with City of Sandy: Assume HHPR 12, DKS Associates 6, GeoDesign 1, Epic 3.

- Virtual coordination meetings with Team/Subconsultants: HHPR 12, DKS Associates 6, GeoDesign 2, Epic 3.
- Public involvement meetings: HHPR and DKS Project Manager will be in attendance. 4-hour duration is anticipated including travel.
- Utility contact list and conflict list
- Provision of 1<sup>st</sup> notice and 2<sup>nd</sup> notice to affected utilities
- Coordination of and attend 3 utility coordination meetings, estimate 1.5 hr each.
- Materials for utility coordination meetings
- Utility plans as needed, incorporated into project plan set.
- Develop specifications for utilities

## **Task 2 – Design Survey and Field Investigations**

### **A. Topographic Survey, Preconstruction Survey, and Base Map Preparation**

Survey shall be commenced as soon as practical after contract is executed. The survey shall include:

- Contact Utility Notification Center of Oregon at least forty-eight (48) hours prior to surveying activities. All underground utilities within the proposed survey area shall be clearly marked.
- Obtain necessary right-of-way permits and traffic control as needed to complete survey tasks.
- Coordinate with property owners to arrange access to private property.
- Survey shall reference the NAD 83 horizontal datum and NAVD 88 vertical datum in International feet for the relative zone in the appropriate State Plane coordinate system. If applicable, provide any combined scale factor and origin used to convert coordinates from grid to ground.
- Record location and description of all primary horizontal and vertical control benchmarks and provide a monument record for each one found.
- Horizontal and vertical data shall be taken at all pavement edges and pads (asphalt, concrete, gravel, etc.), concrete pavement joints, pavement markings (color and width), breaklines, curbs (back, face and pan), utility lines (communications, electrical, gas, sanitary sewer, storm sewer, water, etc.), hand holes, inlet/outlet structures, hydrants, junction boxes, lights, manholes, meters, navigational aids, vaults, fence (height and type), poles/posts (height and type), reflectors, signs, drainage ditches and channels, wetlands and riparian areas, grade breaks, walls, specific site features, etc. A sufficient number of points shall be taken along all horizontal curves to describe approximate radii. Provide structure rim or grate elevations, inverts, and pipe sizes. Points shall be taken on a 25' x 25' grid on pavements and open terrain areas. Hardscape points shall be accurate to within 0.04' and terrain points within 0.10' accuracy.
- Provide recorded information, i.e. property lines, right-of-way, easements, underground utility sizes, etc.
- Other survey work as deemed necessary to provide a complete design.
- Complete pre-construction record-of-survey and record the survey with the County Surveyor per ORS 209.155. Locate all survey monuments that are subject to disturbance or destruction as a result of roadway construction. Survey to reference existing survey monuments together with the controlling centerlines and right-of-way lines. The centerline will be recorded with the Record-of-Survey, and will be used as a basis for the preparation of legal descriptions if required for the widening.

**Task 2A. Deliverables:**

- Field sketches and notes in PDF format
- Photos of field conditions in JPG format
- Survey data in the English system of measurement. Sheets shall be set up to print full size on ANSI D (22"x34") in landscape format. Include an electronic survey base map compatible with AutoCAD 2020 software.
- ASCII file containing all survey points in comma delimited, number, northing, easting, elevation and description format (PNEZD).
- AutoCAD release 2020 DWG format or previously released version.
- Surface entity of existing ground topography with all associated points, feature lines, 3D breaklines, etc. used in creating the surface. If the surface was created using AutoCAD Land Development Desktop, provide all points, breaklines and generated Triangulated Irregular Network TIN file.
- XML file including all alignments, points, surfaces, etc.
- Layer naming convention shall follow the National CAD Standards (NCS).
- Entities shall be separated onto specific layers. Do NOT group dissimilar items together.
- All entities drawn in model view at a scale of 1:1.
- Layer properties of all entities to be set to BYLAYER.
- Block symbols shall be to scale.
- Pre-Construction Record of Survey, recorded with Clackamas County

**B. Right-of-Way Acquisition Legal Descriptions and Exhibits**

- Develop legal descriptions as required for establishment of easements if needed, and right-of-way acquisition if required to accommodate public improvements at intersections. Right-of-way needs to be determined at 30% design review. Four (4) right-of-way files are anticipated.
- Field stake location of acquisitions to facilitate appraisals and property owner negotiations.

**Task 2B. Deliverables:**

- Legal descriptions and exhibits for right-of-way acquisition.

**C. Additional Survey (Contingency Task)**

Following initial design, additional survey may be required to accommodate alternatives that had not been previously thought of. This task provides a contingency budget to get additional topographical or ROW survey if required.

**D. Geotechnical Investigation/Report, Pavement Analysis**

**PROJECT UNDERSTANDING**

The project will include improvements to the intersection of Highway 211 and Gunderson Road in Sandy, Oregon. A new intersection design is planned at the intersection and roads will be widened in the vicinity of the intersection. Relatively small retaining walls may be required to support cuts/fills for road widening. The primary geotechnical considerations are characterizing the soils to depths of 5 to 15 feet for earthwork and utility excavation, subgrade support for new pavements, infiltration capacity, and foundation support for retaining walls.

NV5 will collect subsurface information for the proposed improvements using drilled borings and pavement cores. Borings and pavement cores will be completed by a trailer-mounted drill rig. Laboratory testing will focus on characterizing soil properties and moisture content for pavement,

retaining wall, and general earthwork design recommendations. Project plans were preliminary at the time this scope was prepared. Our scope and fee can be adjusted accordingly as project plans develop.

### **SCOPE**

The project includes evaluation and analysis of data derived from explorations to provide design and construction recommendations. We proposed the following specific scope of services:

- Review subsurface information from work NV5 has previously completed in the area.
- Provide traffic control and traffic control plans for explorations along Gunderson Road and Highway 211, as needed, through our subcontractor.
- Explore subsurface conditions and perform field tests as follows:
  - Complete up to nine borings to depths of 5 to 15 feet within the roadway of Highway 211 and Gunderson Road.
  - Complete up to three borings in the general vicinity of the proposed intersection area to depths of up to 15 feet, if exploration outside the current ROW area is permitted.
  - Complete dynamic cone penetrometer (DCP) tests at depths closely corresponding to the design subgrade at up to ten of the explorations.
  - Complete infiltration tests at up to three of the explorations if the design includes infiltration features.
- Maintain a detailed log of the explorations. Observe groundwater levels during the explorations. Collected samples of the pavement, base, and subgrade material encountered.
- Perform the following laboratory tests:
  - Up to 15 moisture content
  - Up to six Atterberg limits.
  - Up to six percent passing the No. 200 sieve analysis.
- Estimate traffic loading by calculating ESALs based on traffic data provided by the others.
- Provide pavement design options based on DCP testing, subgrade conditions, soil borings, and traffic data. Provide options for asphalt concrete pavement sections based on up to two design life scenarios, including subbase, base course, and AC paving thickness.
- Provide recommendations for site preparation, grading and drainage, stripping depths, fill type for imported material, compaction criteria, trench excavation and backfill, use of on-site soil, and wet/dry weather earthwork.
- Provide design criteria recommendations for retaining walls, including lateral earth pressures, backfill, compaction, and drainage.
- Provide general on-site stormwater disposal recommendations.
- Provide recommendations for the management of identified groundwater conditions that may affect the performance of structures or pavements.
- Provide a draft geotechnical report. The final report will be based on input from the design team.
- Provide recommendations for material specifications.

#### ***Task 2D. Deliverables:***

NV5 anticipates that the field work can be scheduled within four to five weeks of authorization to proceed and can be completed within two field days. The draft geotechnical report will be available approximately four weeks following the field explorations.

- Draft Geotechnical report within eight (8) weeks of task notice to proceed.
- Final Geotechnical report within two (2) weeks of receipt of comments.

### **E.1 Level 1 Hazardous Materials Corridor Study**

Conduct a Level I Hazardous Materials Corridor Study (HMCS) of the Highway 211 and Gunderson Road Improvement project in accordance with the "Hazardous Waste Guide for Project Development" (1990) by American Association of State Highway and Transportation Officials (AASHTO) Special Committee on Environment, Archaeology and Historic Preservation, and the "ODOT Hazmat Program Procedures Guidebook," (2010).

The purpose of the Level I HMCS is to review the development history and current use of properties within the project area to identify the possible presence of adverse environmental conditions that could be encountered during construction of project improvements. Properties identified adjacent to the work areas that are listed on federal, state, or local environmental records may indicate that contaminant releases from these properties have impacted soil or groundwater within the work area. The Level I HMCS report will summarize the results of the historical research and field reconnaissance. The report will also identify adjacent and nearby properties with potential environmental problems and evaluate whether releases from these sites could have impacted the project area. Although the research completed during a Level I HMCS is generally similar to the ASTM requirements for completing a Phase I Environmental Site Assessment (ESA), due to the specific requirements of a Level I HMCS, the assessment should not be considered compliant with the Phase I ESA ASTM Standard. The specific Level I HMCS scope of work is summarized below.

- Review County-provided and readily available geotechnical reports, environmental reports, or other relevant documents pertaining to environmental conditions within the project area.
- Review federal, tribal, state, and local environmental records for listings of known or suspected environmental conditions within the project area and nearby properties using 40 CFR Part 312 and ASTM Practice E 1527-21 as general guidelines.
- Review regulatory agency files for properties in the project area identified in the environmental databases if research indicates that releases of contaminants from these properties are likely to impact construction activities in the project area.
- Review historical aerial photographs, as available and appropriate, to identify development history of properties within the study area relative to the possible use, generation, storage, release, or disposal of hazardous materials.
- Conduct a well search for water supply wells located within or adjacent to the project corridor.
- Conduct a visual reconnaissance of the project area and adjacent properties for visible evidence of possible adverse environmental conditions.
- Provide a draft and final report summarizing the findings regarding the possible presence of adverse environmental conditions within the project area. Provide recommendations for avoidance, or the potential need for a Level II HMCS.

The Level I HMCS does not include preparation of project specifications, special provisions, or management plans associated with identified environmental issues, testing for lead-based paint or asbestos in project corridor structures, evaluation of the presence of radon gas, chain of title research, or an evaluation of polychlorinated biphenyls in street lamps. These services can be completed upon request.

#### ***Task 2.E.1 Deliverables:***

- Draft Level I HMCS report within six (6) weeks of task notice to proceed.

- Final Level I HMCS report within two (2) weeks of receipt of comments.

## **E.2 Shoulder Soil Evaluation (Contingency Task)**

A preliminary review of the project corridor indicated that much of the project corridor may have historically been used for agricultural purposes. Pesticides and associated metals can accumulate in surface soil from routine applications of pesticides on agricultural land. In addition, PAHs and metals can accumulate in shoulder soils as a result of runoff from roadways. Therefore, we have included a scope of services for conducting a Shoulder Soil Evaluation of the project corridor as a contingency task. The scope of services outlined below may be modified based on the results of the Level I HMCS and review of final construction plans. Based on our current project understanding, we anticipate that the following scope of services may be completed during the Shoulder Soil Evaluation:

- Coordinate and manage the field investigation, including public and private utility locates, scheduling of subcontractors, permitting, and coordination as necessary to conduct explorations within the properties and/or right-of-way.
- Contact the Oregon One-Call Utility Notification Center to mark the location of public utilities beneath within the proposed cut area.
- Subcontract a private utility locator to further evaluate proposed exploration locations for the possible presence of unmarked underground utilities.
- Prepare a site-specific Health and Safety Plan.
- If necessary, obtain right-of-way permits, traffic control plans and subcontract traffic control services. Access to private property will be negotiated by the Engineer or the City.
- Divide shoulder soils within the project corridor into three composite sample areas (composite sample areas Comp-1 through Comp-3).
- Advance six hand auger borings in each composite sample area to a depth of 1.5 feet BGS, including three hand auger borings 5 feet from the edge of pavement and three hand auger borings 10 feet from the edge of pavement.
- Collect three discrete soil samples from each hand auger boring, including a discrete soil sample between 0 and 0.5 foot BGS, a discrete soil sample between 0.5 and 1 foot BGS, and a discrete soil sample between 1 and 1.5 feet BGS.
- Submit the 54 discrete soil samples to the analytical laboratory for compositing under standard chain-of-custody procedures.
- Composite the 54 discrete soil samples into six composite soil samples from each composite sample area, including two composite samples representing soil between 0 and 0.5 foot BGS, two composite soil samples representing soil between 0.5 and 1 foot BGS, and two composite soil samples representing soil between 1 and 1.5 feet BGS.
- Analyze the 18 composite soil samples for one or more of the following:
  - Gasoline-range hydrocarbons by Method NWTPH-Gx
  - Diesel- and oil-range hydrocarbons by Method NWTPH-Dx
  - PAHs by EPA Method 8270D SIM
  - 17 agricultural use total metals by EPA Methods 6020B and 7471A (ICP-MS)
  - Organochlorine pesticides by EPA Method 8081B
  - Chlorinated herbicides by EPA Method 8151A
  - PCBs by EPA Method 8082A
- Summarize the results of the Shoulder Soil Evaluation in a report including laboratory reports, and a discussion of the analytical results within the context of the DEQ regulatory framework.

**Assumptions:**

- Field activities will be completed in one day.
- Soil samples will be analyzed on a standard (5- to 10-business day) turnaround time.

**Deliverables:**

- Draft Shoulder Soil Evaluation report within six (6) weeks of task notice to proceed.
- Final Shoulder Soil Evaluation report within two (2) weeks of receipt of comments.

**F. Cultural Resource Survey (Contingency Task)**

At this time, it is not known whether the project will require a permit from the USACE; therefore, this task is a placeholder for that contingency. There is a culvert under the north leg of Hwy 211 about 300 feet north of the current intersection with Gunderson Road. Changing the alignment of Hwy 211 to tie into the new intersection location would likely require extension (or reconstruction) of this culvert. If ODFW determines that this is a fishbearing channel, that would trigger requirements for a Corp permit, and as such include requirement for a cultural resources study. The cultural resource study will be a survey to identify archaeological and historic resources that are within the Area of Potential Effect (APE). A preliminary assessment of resource significance will be provided.

The cultural resource survey will consist of:

- A background review of archaeological and historical information and research using the State Historic Preservation Office's (SHPO) records and from other sources;
- A historic resource reconnaissance;
- A pedestrian survey by archaeologists walking 50 feet or less apart;
- Shovel testing of areas that appear most likely for an archaeological site, based on the landform, historical research, or presence of artifacts nearby;
- Delineation and recording of archaeological resources, if resources are found;
- Documenting historic resources, if historic-period buildings or structures are identified; and
- Preparation of a report meeting the federal requirements and following SHPO guidelines.

At this time, HHPR has provided a budgetary estimate of this contingency task. If required, HHPR will coordinate with AINW or other firm to complete this work as required.

**Task 2C. Deliverables:**

- Draft and final Cultural Resources report and resource forms.

**Task 3 – Traffic Engineering**

**A. Speed Study**

DKS will facilitate a speed zone study for the Highway 211 corridor near the Gunderson Road intersection. The specific limits of the speed zone study will be determined prior to the analysis based on input from city staff and a review of the current posted speed

limits in the study area. The objective is to evaluate the existing conditions and determine the appropriate posted speed limit. DKS will request ODOT to conduct a speed zone study and provide available data and information needed to support the request. DKS will coordinate directly with ODOT staff to support the process of the speed zone study, review the initial ODOT posted speed recommendations with City staff and provide feedback to ODOT regarding the final posted speed limit. DKS will provide support to City staff if the ODOT findings go to the Speed Review Panel and negotiations are required to obtain a posted speed limit acceptable to the City.

***Task 3A. Deliverables:***

- Preparation, submittal and tracking of speed zone study request (including supporting data) to ODOT
- Coordination with ODOT regarding Speed zone study (conducted by ODOT)

**B. Pedestrian Crossing Study**

- Provide a Pedestrian Safety Study at the intersection of Hwy 211/Gunderson Road. The main elements of the pedestrian study will include but not be limited to the items listed below:
  - Overview of facility
  - Crash Analysis
  - Vehicle & Pedestrian counts
  - NCHRP 562 analysis
  - Recommendations for pedestrian crossing treatments
- Complete all deliverables associated with a completed pedestrian study and for recommending, based on the study and the NCHRP 562 report, the type of treatments or devices that are appropriate for the crossing.
- No additional traffic data will be collected.

***Task 3B. Deliverables:***

- Draft technical memo summarizing results of the pedestrian crossing study
- Final technical memo summarizing results of the pedestrian crossing study

**C. Permanent Signing/Striping Design**

- Design permanent signing and pavement marking plans, specifications, and a construction cost estimate along the improved sections of Hwy 211 and Gunderson Road. Signing and striping design will meet City of Sandy and MUTCD requirements. Signing plans shall include, but are not limited to the following: permanent signing plan, signing details, and sign/post data table. Striping plans shall include but are not limited to roadway alignment, stationing, channelization information, tapers, centerlines, lane lines, shoulder width information, and dimensions. It is anticipated that cross street approaches will require minor signing and striping modifications near the intersections. The following plan shall be prepared:
  - Signing/Striping Legend – 1 sheet
  - Signing/Striping Plans – 4 sheets (1:40 scale)
  - Sign installation details – 2 sheets
  - Striping details – 1 sheet



***Task 3C. Deliverables:***

- PS&E delivered at the 30%, 60%, 90%, and final levels of completion as part of Task 6D

**D. Illumination Design**

- Perform lighting analysis along the improved sections of new sections of Hwy 211 and Gunderson Road, including the intersection, using AGI. Consultant to coordinate with PGE for lighting power sources.
- Results of lighting analysis will be shown in a table in the lighting plans; no separate lighting memo will be prepared.
- Prepare roadway illumination design per IESNA or AASHTO standards for minor arterial roadways showing all underground infrastructure (light pole foundations, junction boxes, conduit) for new light poles. PGE will be responsible for energizing the lighting system. New poles will be energized via underground conduit. Illumination standard (pole and luminaire type) will be selected by the City and provided to the design team. The following plan sheets shall be prepared:
  - Illumination legend – 1 sheet
  - Illumination plans – 4 sheets (1:40 scale)
  - Illumination details – 2 sheets

***Task 3D. Deliverables:***

- PS&E delivered at the 30%, 60%, 90%, and final levels of completion as part of Task 6D.

**E. Temporary Traffic Control**

- DKS will prepare final PS&E for temporary traffic control to safely and efficiently accommodate traffic during the construction of the project. The following plan sheets shall be prepared:
  - Advanced Signing Plan – 1 sheet
  - Temporary Traffic Control Plans – 5 sheets (1:40 scale)
  - Temporary Traffic Control Details – 2 sheets
  - **Plans will meet MUTCD and ODOT requirements.**

***Task 3E. Deliverables:***

- PS&E delivered at the 30%, 60%, 90%, and final levels of completion as part of Task 6D.

**Task 4 – Environmental Permitting**

**A. Wetland and Waters Delineation**

HHPR will conduct an office review and field investigation to delineate wetland boundaries, if present, and determine the Ordinary High Water Mark (OHWM) and flow duration at stream crossings, if present. The wetland delineation will follow the three-parameter method described in the U.S. Army Corps of Engineers (USACE) Wetland Delineation Manual (USACE 1987) including updated protocol guidance in the Regional Supplement to the Corps of Engineers Wetland Delineation Manual: Western Mountains, Valleys and Coast Region (USACE 2010). The wetland report will be submitted to the Oregon Department of State Lands (DSL) for concurrence. For this task, HHPR will:

- Conduct an office review of available data for wetland, hydric soils, and streams in the vicinity of the proposed project;
- Delineate wetlands and waters of the U.S. and State within a study area that encompasses the proposed project impact area;
- Complete a stream flow duration assessment at stream crossings, if present, following the Streamflow Duration Assessment Method for Oregon;
- Coordinate with the Oregon Department of Fish and Wildlife (ODFW) to determine if crossing locations are considered current or historic native migratory fish habitat;
- Prepare a DSL/USACE format wetland report documenting findings;
- Submit draft report to the client for review;
- Submit report to DSL for concurrence and coordinate with the project team to provide any additional information requested by DSL during their review.

***Task 4.A Assumptions:***

- Field work will be conducted when relevant indicators are present (e.g. wetland hydrology); ideally in spring (typically March – May) or in late fall (typically October – December) depending on site conditions;
- The study area is accessible and safe;
- Boundaries of proposed project will not exceed delineated area in subsequent design iterations;
- Fieldwork can be completed in 4 days by a 2-person crew;
- Client will pay review fee;
- DSL does not request a site visit;
- No significant changes to report and no requests for additional wetland delineation by DSL.

***Task 4.A Deliverables:***

- DSL-format wetland report (one draft provided electronically to the client, one final for submittal)

**B. Joint Fill/Removal Permit (Contingency)**

Work within wetland boundaries or below the ordinary high water mark of the streams will require permit approval from USACE, the Oregon Department of Environmental Quality (DEQ) and, if greater than 50 cubic yards of cumulative removal and fill, from DSL.

Application to these agencies will be submitted via a Joint Permit Application (JPA). For this task HHPR will:

- Prepare a Joint Permit Application (JPA) for a US Army Corps of Engineers (USACE) Clean Water Act §404 permit, an Oregon Department of Environmental Quality Clean Water Act §401 Water Quality Certification, and an Oregon Department of State Lands (DSL) Fill/Removal permit.

- Complete a wetland functional assessment using the latest ORWAP protocol required by DSL;
- Complete a stream functional assessment using the latest SFAM protocol required by DSL;
- Organize and lead pre-application meetings with DSL and USACE;
- Coordinate with AINW regarding cultural survey requirements for the JPA submittal;
- Coordinate with agencies during review.

***Task 4.B Assumptions:***

- The project will qualify for a Nationwide Permit (NWP) from USACE;
- The project will qualify for a Nationwide Water Quality Certification from DEQ;
- The project will qualify for a General Permit from DSL;
- The project will not require Sandy Flood and Steep Slopes Hazards permitting;
- Fieldwork for the SFAM can be completed in 1 day by a 2-person crew;
- Only one SFAM will be required;
- Agencies will not request additional field work or field meetings;
- Wetland mitigation to DSL will consist of Payment-in-lieu.
- USACE will not require mitigation;
- The project will not include culvert replacement;
- No Endangered Species Act (ESA) listed fish species are present at the stream crossings;
- Potential impacts to ESA-listed fish species downstream of project crossings will be addressed via compliance with Standard Local Operating Procedures for Endangered Species for Stormwater, Transportation or Utilities (SLOPES V) stormwater standards;
- No other ESA-listed or State-listed Threatened, Endangered, or candidate species or habitat are present in the project area of potential impact;
- The JPA will be based on the 60% design—subsequent changes to the project design will not necessitate significant changes to the JPA;
- The JPA submittal to USACE will include the results of a cultural resources investigation conducted by AINW;
- One meeting with the project team;
- Comments by agency staff will be minor in extent, editorial in nature, and not require additional field work or analysis; and
- Client will pay permit and mitigation fee.

***Task 4.B Deliverables:***

- Joint Permit Application (one draft provided electronically to the client, one final for

### **C. Fish Passage Plan (Contingency)**

If culvert replacement is required at a stream crossing and ODFW determines that location is current or historic native migratory fish habitat, a Fish Passage Plan, Exemption, or Waiver will be required. In this case, HHPR will:

- Work with the design team to achieve compliance with fish passage laws;
- Coordinate with ODFW regarding passage requirements and design;
- Prepare a Fish Passage Plan and submit to ODFW for approval;
- Include the approved Fish Passage Plan in the JPA submittal package;
- Work with the design team to ensure that the final project plans are consistent with the approved Fish Passage Plan.

#### ***Task 4.C Assumptions:***

- Fish Passage Law requirements will be met via compliance with ODFW fish passage standards;
- Any in-water work will be completed during the ODFW in-water work window, as determined during coordination with ODFW.

#### ***Task 4.C Deliverable:***

- Draft and Final Fish Passage Plan.

### **Task 5– Property Acquisition**

#### **A. Title Examination, Clearance and Title Reports**

Upon NTP, Epic staff will order title reports for all 4 affected files. Epic has relationships with several local title companies, making ordering title reports and conducting follow up a streamlined process. Once title reports are received, Epic’s in-house title reviewer will review all vestings and exceptions so that the Project Manager can communicate any potential title problems to HHPR and the City early.

#### ***Task 5A. Deliverables:***

- Preliminary Title Reports
- Title Review Reports

#### **B. Appraisal/Appraisal Review**

Upon receipt of authorization to proceed with ROW Acquisition, Consultant shall setup ROW parcel files and deliver a General Information Notice (“GIN”), acquisition and relocation brochures, and a copy of the applicable portion of the ROW Acquisition map (marked Preliminary and showing the parcel(s) to be purchased) to all owners and occupants of affected properties. The GIN must be on City letterhead. The Consultant shall mail the GIN packet via certified mail with return receipt requested to up to four property owners and shall document it in the diary of contact report, noting all attachments to the GIN.

Consultant shall provide Real Estate Appraisals conforming to standards contained in the Uniform Standards of Appraisal Practice (“USPAP”) and ODOT Right of Way Manual. All appraisals must be prepared using Agency approved forms or formats. Consultant shall

provide no fewer than fifteen (15) calendar day's written notice to owners of a planned appraisal inspection. Consultant shall provide the property owner and designated representative, if any, an invitation to accompany the appraiser on any inspection of the property for appraisal purposes. The 15-day appraisal notice and right to accompany shall be hand delivered or mailed certified and documented in the diary of contact report. The appraisals must be Value Finding or Taking and Damage reports in a summary format for up to four properties with impacts to the properties which result in minimal to no damages. Once appraisals are completed, Epic will coordinate the appraisal review process for the City to establish Just Compensation for the properties.

***Task 5B. Deliverables:***

- General Information Notices
- Appraisals
- Appraisal Reviews
- Memorandum of Just Compensation for City Approval

**C. Offers and Negotiation**

Consultant shall conduct negotiations for acquisitions of real property on up to four files based on Appraisal Review and in accordance with all applicable state and federal laws in place at time of Project. Consultant shall provide all property owners a complete copy of Appraisal and all essential documents at the initiation of negotiations, to include: Project information letters, acquisition and relocation brochures, summary statements, offer-benefit letters on City letterhead, and instrument of conveyance. Epic ROW Agents will attempt to meet with all property owners in person but will mail offers via Certified Mail if a face-to-face appointment is not scheduled within a week of offer preparation and document it in the diary of contact report, noting all attachments.

Consultant shall make every reasonable effort to acquire ROW expeditiously by negotiation. Consultant shall give property owners reasonable opportunity to consider the offer (statutorily forty (40) calendar days) and to present information the owner believes is relevant to determining the value of the property.

- IF the OFFER is ACCEPTED, Consultant shall present a Final Report Packet covering the acquisition of ROW to City for final approval, payment, conveyance of title and recording.
- IF a COUNTEROFFER is received, Consultant shall submit the proposed COUNTEROFFER (exceeding the estimate of just compensation) with a justification letter and owner supplied supporting documentation to City for approval. If accepted, see above.
- IF an acceptable agreement is not reached after three substantive negotiation attempts, Consultant shall prepare and submit a Recommendation for Condemnation and return the file to the City.

For property owners considering donation, Consultant shall inform property owners, in writing, of their right to just compensation; such property owners may elect to donate by signing a waiver of their rights.

Consultant shall maintain written diaries of contact with property owners and tenants to record all events such as efforts to achieve amicable settlements, owner's suggestions for

changes in plans, and responses to owner's counter proposals. The delivery of GIN packet, fifteen (15) day appraisal inspection letter and Offer Packet must be included in the diary of contact report. As property owner issues and questions arise, the Project Manager will work closely with the City to obtain answers and solve problems in order to obtain property owner signatures.

***Task 5C. Deliverables:***

- Offer Package Preparation
- Present Written Purchase Offers
- Good Faith Negotiation Recommendations and Counteroffers
- Fair Settlement

**D. Closing Files**

Epic shall assist with closing activities while coordinating closing with the title company. Closing activities include clearing title, requesting title insurance on behalf of the City if directed, and closing all files. Ideally, these issues will be addressed early in the project, if they arise at all. Epic will work with HHPR's and the City's Project Managers and legal department early in case of any title concerns that could delay closing.

***Task 5D. Deliverables:***

- Completed Right-of-Way Files

**Assumptions**

- The City will provide Conveyance Documents to Consultant.
- The City will record documents and make payment to property owners.
- There are four parcels identified and it is assumed that there are no larger parcels.
- The City will draft and approve a Resolution of Necessity prior to the initiation of negotiations.
- Rights of Entry are not needed for this project.
- Relocation services are not needed for this project.
- The appraisals will be Taking and Damages reports. If it is determined that a Before and After appraisals or specialty reports are necessary, appraisal and review fees will be adjusted accordingly.
- Assumed no federal funds are being used on the project

**Task 6 – Design Development**

**A. Roadway Alignment Analysis**

The horizontal and vertical alignments of Hwy 211 and Gunderson Road will be analyzed to provide the optimum intersection configuration that minimizes impacts to sensitive environmental areas and habitat, impacts to private properties, earthwork quantities, retaining walls, and to provide safe vehicular and pedestrian traffic throughout the project corridor.

***Task 6A. Deliverables:***

- The roadway alignment analysis will be included in the Design Report submitted at the 30% review stage.

## **B. Storm Drainage Alternatives**

Storm drainage management is a key component of the project and treatment and detention of the storm drain runoff throughout the project corridor will be required. The storm water will need to be collected, treated, and detained prior to discharge into one of the seasonal streams and/or wetlands, preferably using biofiltration and infiltration. Storm drainage measures will need to be part of the permit applications.

### ***Task 6B. Deliverables:***

- Alternatives for storm drainage will be included in the Design Report submitted at the 30% review stage.
- Storm Drainage Report

## **C. Construction Documents**

- Prepare preliminary (30%, 60%) and final (90%, 100% Final) project designs, drawings, and specifications based upon City of Sandy Standards, including preparing supplemental general conditions and special provisions. Prepare engineers estimates and bid documents.
- Draft construction bid documents on behalf of the City. City's standard template and EJCDC General Conditions shall be utilized for creating the bid plan set. Sheets in the plan set shall include, but are not limited to:
  - Cover sheet and sheet index.
  - Existing condition plan.
  - Demolition plan.
  - Erosion control plan.
  - Roadway geometry plan.
  - Typical roadway sections including pavement sections.
  - Construction Staging plan
  - Plan and profile views along roadway centerline with construction notes.
  - Intersection grading and details.
  - Detailed ADA ramp design at each intersection.
  - Plan, profile, and details for stormwater mains.
  - Plan and details for water quality/detention facilities.
  - Plan and details for creek crossing structures (if required).
  - Retaining wall plan and profiles.
  - Landscape/irrigation plans.
  - Wetland mitigation plans.
  - Temporary Traffic Control Plans.
  - Roadway illumination plan.
  - Signing/stripping plan and details.
  - City and/or ODOT standard details.
  - General notes.

### ***Task 6D. Deliverables:***

- 30% Design

- Preliminary plans or strip map
- Design report
- Determination of right-of-way needs
- Schedule revised as needed to accommodate R/W acquisition phase
- Determination of easement needs
- Summary and cost of utility conflict resolution
- Preliminary reports and calculations as they progress
- 60% Design
  - Plan set, DWG and PDF
  - Cost estimate
  - Preliminary reports and calculations as they progress
  - Design alternatives as they progress
  - Outline of specifications
- 90% Design
  - Plan set, DWG and PDF
  - Cost estimate
  - Specifications
  - Other bid documents
- 100% Final Design
  - All final documents, drawings, reports, calculations. DWG, PDF, DOC format as appropriate

**D. City Review of Construction Documents**

The City will be allocated 2 weeks to complete reviews of the 30%, 60%, 90% and final PS&E Packages. HHPR and DKS will meet with the City to discuss comments from each submittal.

***Task 6E. Deliverables:***

- Completed comments logs addressing reviewing agencies comments with the 60%, 90% and final Submittal.

**Task 7 – Other Services as Directed by City**

The purpose of this task is to have an allowance fee for project components that have not been identified at the time of preparing this fee proposal. Having an allowance fee, whether it is utilized or not, provides benefit to the City as the HHPR team can provide immediate attention to unknown components without having to get City Council approval.

**Task 8 – Construction Phase Services (Not included in Fee Schedule)**

Due to uncertainty surrounding the final design, construction timing and duration, and anticipated needs of the City, a fee for construction phase services has not been included with this proposal. We would anticipate that our contract will be amended to include construction services closer to that time. The following highlights construction services that we anticipate will be required for this project.

**A. Advertise for Bids**

HHPR will assist the City with advertisement of the project. HHPR will prepare the advertisement and ensure the necessary organizations and job centers receive the bid documents.



**Task 8A. Deliverables:**

- Completed advertisement for bids to City and job centers.

**B. Bid Assistance**

HHPR will assist the City as required during the bidding process. This includes attending a pre-bid conference, answer contractor questions during the bid process, and issue addenda as required.

**Task 8B. Deliverables:**

- Completed log of questions and/or issues by contractor.
- Provide addenda to the City, potential bidders, and plan centers.

**C. Bid Opening**

HHPR will attend the bid opening at the City. All bids will be tabulated and checked for accuracy.

**Task 8C. Deliverables:**

- Completed log of questions and/or issues by contractor.
- Completed bid tabulation

**D. Contract Award**

Once a successful low bidder has been identified, HHPR will prepare Notice of award to Contractor. HHPR will schedule and attend a Pre-Construction Conference prior to commencement of work.

**Task 8D. Deliverables:**

- Notice of Award
- HHPR will prepare preconstruction conference agenda and meetings noted for distribution.

**E. Construction Survey**

HHPR will provide construction staking services to facilitate the construction of the proposed improvements. Consultant will coordinate with City and their selected contractor to provide industry standard staking to include, but not limited to, the following items:

- Survey control
- Erosion control measures
- Roadway centerline, curb, intersection, pedestrian ramps, and sidewalk
- Storm lines and structures
- Retaining walls
- Roadway lighting
- Provide survey services for setting monumentation of centerline and new right-of-way.

**Task 8E. Deliverables:**

- HHPR will prepare and file a Post-Construction Survey with the Clackamas County Surveyor's Office in compliance with ORS 209.155.

**F. Construction Management and Observation**

The HHPR team will provide construction management and field observation as outlined

below:

- Coordination with the Project Engineers: HHPR will work closely with the design engineer, City staff, and private property owners to ensure that what is constructed continues to meet the intent of the design.
- Material Submittal and RFI Review: HHPR will provide timely review and response for materials submittals, RFI's, and general construction issues that arise prior to, or during construction. HHPR takes this task as a priority as to ensure that construction is kept on schedule and that potential cost implication are minimized.
- Change Order Review: HHPRs' Project Manager/Engineer, Construction Manager and/or inspector will carefully review Change Order requests for need, validity and related costs. Ideally, unit prices from the contractor's bid can be extended to avoid change orders. However, if a change order is needed, establishing a fair cost for both the City and the Contractor avoids potential claims.
- Quality Observation: Observing the methods of construction, quality of installation, and conformance with construction documents is a critical element to quality inspection. Equally important is adequate documentation of construction activities. HHPR inspectors take detailed daily notes of activities, personnel, and site conditions and maintain a photographic record of construction activities.
- Quantity Verification and Pay Requests: Each HHPR inspector is issued a set of inspection tools to be used for field verification of construction quantities. Getting accurate and detailed descriptions of quantities installed is critical in ensuring that the City is getting the product specified in the plans and the product they paid for. HHPR will provide recommendations for payment to the City's Project Manager.

***Task 8F. Deliverables:***

- Change orders as needed for City approval.
- Formal RFI responses and/or work directives will be prepared for distribution.
- Monthly pay requests.
- Daily Inspection Reports
- Quantity and quality documents following completion of the project.
- HHPR inspector(s) will provide copy of plans showing construction modification for inclusion in as-built drawings.

**G. Geotechnical Construction Management and Observation**

Based on our experience at similar sites, we anticipate that NV5 will provide various levels of technical support and coordination during construction, including but not limited to participation in a project meeting, correspondence, and requests for information by project team members.

The purpose of our geotechnical construction observation services is to support HHPR and the city if construction-related issues arise. We assume that the daily materials testing will be completed by others and that our role will be to address special geotechnical issues that arise during construction and to evaluate contractor-submitted requests for information (RFI). If requested to perform construction observation, our specific scope of services will include the following:

- Evaluate subgrade preparation after clearing/stripping/demolition and before placing fill material by either probing or observing proof rolling. Provide recommendations for the remediation of identified unsuitable areas or disturbed subgrade material.
- We assume that the evaluation of the placement and compaction of fill material will be completed by others, but NV5 may be asked to review results.
- We assume that the evaluation of trench bedding and backfill will be completed by others, but NV5 may be asked to review results.
- We assume that the evaluation of the placement and compaction of the aggregate base and asphalt concrete pavement will be completed by others, but NV5 may be asked to review results.
- Perform project management tasks, including reviewing field reports by others as well as email and telephone correspondence.
- Attend up to two project meetings at the site.
- Prepare field reports summarizing our observations following each site visit and provide copies to members of the design and construction teams as required. The number of site visits assumed are presented below.
- Prepare up to three correspondence items addressing construction activities, responding to requests for information, or providing summary letters for the project.

***Task 8G. Deliverables:***

- Correspondence, photos, and field reports as required.

**H. Final Notice of Acceptability of Work**

HHPR construction manager, field inspector, and other appropriate team members will lead the initial project walk-through with the City and Contractor. Based on their findings, HHPR will prepare a punchlist for required remedial work. Following completion of remedial work, a final walk-through will be performed for punchlist verification. Following successful completion of all punchlist items, HHPR will prepare a final notice of acceptability and recommend project closeout.

***Task 8H. Deliverables:***

- Provide punchlist to City and Contractor
  - Provide notice that the work is generally in accordance with the contract documents and recommend for or against final payment.
- HHPR will provide the City with copies of all project files including record drawings.





# REQUEST FOR QUALIFICATIONS

## CITY OF SANDY, OREGON

### Highway 211 Gunderson Road Intersection Project

The City of Sandy is soliciting statements of interest and qualifications information from consulting engineering firms to provide design and construction management services for the intersection of Highway 211 and Gunderson Road.

Sandy is located approximately 25 miles east of Portland, OR with a population of about 13,000.

The intersection of Highway 211 and Gunderson Road is located within the City of Sandy, approximately 1.25 miles south of the intersection of US 26 and Highway 211. Current and future developments will lead to a need for a traffic solution for the intersection. The future usage of the arterial will exacerbate an already dangerous stretch of roadway.

The need for an intersection improvement is identified in Sandy's Transportation System Plan (TSP.) As this plan did not prescribe the method of improvement, DKS (as Sandy's Consultant) performed an analysis which determined that a single lane roundabout is an optimal solution at this location. The project will be 100% locally funded.

#### **Desired Qualifications**

1. A consultant team and Project Manager that can work closely with the City, property owners, the public and regulatory agencies to plan, develop, and design and implement the project.
2. A consultant team and Project Manager with a demonstrated track record of planning, developing, designing and providing construction management services for projects similar in scale and scope to the work contemplated.
3. A firm and Project Manager with the ability to manage any required right-of-way acquisition and environmental subconsultants and keep these and other critical project elements on track and on schedule. Depending on roundabout design, environmental and land acquisition may not be required by this project.

**Submission Requirements:** Interested and qualified firms are invited to submit information that demonstrates their experience in performing projects of this scale and complexity. Documentation should include the following information:

1. A brief profile of the firm, project manager and project staff to be assigned to this project along with a brief description of experience and expertise offered by each team member.

2. A statement that the firm is licensed to perform engineering services in the State of Oregon and a certified statement that the firm is not disbarred, suspended, or otherwise prohibited from professional practice by any federal, state or local agency.
3. A summary demonstrating the firm's qualifications and ability to provide professional services as required to successfully complete the project.
4. A representative list of successfully completed recent projects and current projects under development, managed, and designed by the proposed firm and Project Manager in the Pacific Northwest comparable to the contemplated work. Provide contact information (name, title, email address and phone numbers) for client project staff on each of these projects.
5. Provide a minimum of three references from previous clients on similar projects completed within the past five (5) years. Please include client's name, address, email, and telephone number.
6. Include any information not previously listed in items 1 through 5 above that is considered essential in illustrating the firm's qualifications.
7. Please include relevant information on sub-consultants your firm would employ for this project, including sub-consultant's background & profile, key staff assigned to the project, specialties, experience, and references.

**Information Provided:** The Highway 211/Gunderson Road improvement study is attached. Other pertinent data such as Sandy's TSP, ArcGIS shapefiles, and other traffic information is available upon request.

**Evaluation Process:** The City will evaluate responses per ORS 279C.110(5). The selection of the engineering firm for this project will be accomplished through a two-step process:

1. Statements of Interest & Qualifications will be evaluated by City staff. During the evaluation process, evaluators reserve the right, where it may serve the City of Sandy's interests, to request additional information or clarification from potential firms, or to allow corrections of errors or omissions. At the discretion of the City, certain of the firms submitting statements and qualifications information may be invited to a make brief presentation as part of the evaluation process.
2. The City will evaluate all respondents and invite the top-three ranked firms to submit price proposals.

**Evaluation Criteria:** Criteria for ranking firms include:

- Capabilities, of Project team in providing services related to transportation project planning, design and construction management in the Pacific Northwest in the preceding 10 years. (15 points maximum).

- References from previous and current clients for which the Respondent has performed or is performing work of similar size and scope as the work contemplated (10 points maximum).
- Abilities, experience and past performance of Project team related to development of preliminary concepts, alignments, alternatives, recommendations and cost estimates for the Project (20 points maximum).
- The Project team's experience on similar projects working with relevant regulatory agencies, local planning departments, property owners and the public (20 points maximum).
- The Project team's experience, past performance and ability to adhere to budgets, schedules and to meet deadlines. (20 points maximum)

Maximum points available after this step: 85. The sum of points assigned to each firm by the reviewers will be used to select the top three respondents.

The top three respondents will then be invited to submit price proposals conforming to the requirements in ORS 279.110C and based on the Desired Scope of Services listed in the following section.

Based on the preliminary project scoping estimate the estimated cost for planning, design and construction management services ranges between \$300K and \$450K

The Scope of Services desired by the City includes but is not limited to the following:

- Perform surveys of existing built and natural features and conditions, topography and property surveys necessary to develop preliminary roundabout configurations, determine riparian and wetland impacts and define preliminary right-of-way requirements.
- Perform geotechnical investigations necessary to define project requirements and inform roadway design concepts.
- Perform wetland delineations and environmental evaluations necessary to determine impacts of the project.
- Provide advice and recommendations on alternative contracting methods that may be suitable for the project
- Based on preliminary alignment(s) and riparian and wetland impacts determine environmental and land use permitting requirements
- Prepare and submit any required wetland fill/removal and other environmental and land use permit applications and coordinate with relevant Federal, State and Local agencies as needed.
- Attend public meetings, open houses and presentations as needed
- Perform land acquisition services as necessary
- Prepare property owner notices, appraisals, legal descriptions and offer letters per the requirements of ORS Chapter 35
- Prepare preliminary intersection alignments and designs for City review and comment at appropriate stages in the design/permitting process.
- Incorporate pedestrian walkways in coordination with City plans into design.



- Make recommendations regarding crosswalks and accompanying safety devices to be incorporated into design.
- After required environmental, land use and permits are acquired prepare final design plans and contract documents for bid letting
- Perform a speed study for Highway 211 to determine appropriate speed limit.
- Review bids received and make recommendation of award
- Provide construction observation and inspection services (including third-party and special inspections) commensurate with the scope and complexity of the construction project
- Develop monitoring and reporting plan for any wetland mitigation required by Federal or State agencies, as needed.
- Coordinate project closeout documents and prepare as-constructed drawings for the completed project.

The price proposals shall include at a minimum the following items:

1. A loading chart depicting the assigned consultant staff hours for each task by position classification and the hourly billing rate (including overhead) for various staff members assigned to the project.
2. A summary of costs (with estimated expenses and sub-consultant markups listed separately) for each project element, task and sub-task by category (project management, survey, right-of-way, environmental, design and construction management services).

The information requested with the price proposals may be provided in a single table or separately.

Price proposals will be evaluated on the value of the services provided to the City, not necessarily the least cost. A maximum of 15 points are available to be assigned to price proposals.

The sum of points awarded for step one and step two (100 points maximum) will be used to select the successful firm.

The anticipated schedule for the project is outlined below:

- February 2023 - begin survey, preliminary design and environmental work
- April 2023 – define right-of-way requirements, perform appraisals
- May 2023 – submit offers to property owners, submit removal-fill permit and land use permit applications AS NEEDED
- May 2023 – July 2023 – complete final design and contract document preparation. Complete right-of-way acquisitions, land use and environmental permitting AS NEEDED.
- July 2023 – advertise project

**Sample Form of Contract and Protest Procedures:** A sample Professional Services Agreement is attached to this document. This is intended to demonstrate the basic framework of

the Agreement between the City and the selected firm and not the final form of Agreement between the parties.

A protest, (if any) of the evaluation, ranking and selection process shall substantially conform to those procedures described in OAR 137-048-0240.

Consultants responding to this solicitation do so at their own sole expense. The City is not responsible for any costs associated with submitting qualifications information and a price proposal.

**Proposal Format and Due Date:** Concise responses with relevant information as outlined in the Submission Requirements section above will be more useful than elaborate submittals with extensive graphics and corporate boilerplate. To be considered, four (4) hard copies and one (1) digital (Adobe .pdf file) copy of the Statement of Interest and Qualifications must be received by AJ Thorne, Assistant Public Works Director at 39250 Pioneer Blvd, Sandy, OR 97055 by 4:00 p.m. on **January 19<sup>th</sup>, 2023**.

**Selection Timeline:**

1. January 4<sup>th</sup>, 2023 – Pre-submittal information session 1:00 PM Sandy City Hall (optional)
2. January 19<sup>th</sup>, 2023 – Responses due by 4:00 PM
3. January 27<sup>th</sup>, 2023 – Responses evaluated and all respondents notified of the top three respondents selected
4. February 3<sup>rd</sup>, 2023 – Price proposals submitted
5. February 10<sup>th</sup>, 2023 – Price proposals ranked, highest-ranked firm and remaining two firms notified
6. February 17<sup>th</sup>, 2023, 5:00 PM – Deadline for protests
7. March 15, 2023– Scope, fee and contract finalized, any protests resolved
8. April 27, 2023 contract approved by Council

**Point of Contact:** Any questions, clarifications, or requests for general information should be directed by EMAIL ONLY to: [ajthorne@cityofsandy.com](mailto:ajthorne@cityofsandy.com). Please include the following in the subject line: *RFQ – Highway 211/Gunderson Rd Intersection*.



## ANALYSIS SUMMARY

DATE: October 5, 2022  
TO: Kelly O’Neill Jr. | City of Sandy  
FROM: Dock Rosenthal, PE and Reah Flisakowski, PE | DKS Associates  
SUBJECT: Highway 211/Gunderson Road Improvement Study

This memorandum presents the traffic and safety analysis conducted for the Highway 211/Gunderson Road intersection and adjacent Highway 211 segments. The analysis evaluated a range of potential improvements to accommodate future traffic volumes and safety needs and made recommendations based on the findings. The project background, analysis findings and recommendations are summarized in the following sections.

### BACKGROUND

The Shaylee Meadows subdivision was recently developed west of Highway 211. It included the construction of a segment of the Gunderson Road extension project that is identified in the Sandy Transportation System Plan (TSP). The Gunderson Road segment created a new intersection on Highway 211 that is currently controlled by a stop sign on the side street approach. The intersection is located on a segment of Highway 211 with a moderate grade and near a horizontal curve. The developer of the subdivision was required to contribute partial funding to construct improvements at the new intersection. The specific improvements were not identified with the development approval.

### INTERSECTION CONTROL ANALYSIS

#### ANALYSIS FRAMEWORK

Operations analysis of the Gunderson Road/Highway 211 intersection was completed for the following scenarios:

- 5-year (2027) to identify short-term improvements (AM and PM peak hour)
- 20-year (2042) to identify long-term improvements (AM and PM peak hour)

A Vistro model of the study area was created that included the Highway 211/Gunderson Road intersection and connections to SE 362<sup>nd</sup> Drive, Dubarko Road, and Highway 211 for each scenario. The model was used to estimate the traffic growth on each major access point that connects to the new intersection. This model was also used to evaluate intersection operations (following Highway Capacity Manual methodology) and report estimated delay, level of service, and volume to capacity ratios.

The 5-year scenario was based on the existing street network with no new road connections south of US 26 that may influence regional or local travel patterns. Traffic volume growth at the intersection was limited to the trips generated by approved development at Shaylee Meadows (north of Highway 211) and a portion of the expected growth in the Cascadia Village development (south of Highway 211).

The travel demand model developed for the 2011 Sandy TSP was used to inform the expected distribution of traffic through the study street network. This travel demand model has not been calibrated to existing 2022 conditions and the distributions that were used were somewhat modified based on engineering judgement.

Volumes for the 20-year scenario were developed assuming the following new connections in the network:

- Sockeye Street extension west to Deming Road providing access to 362<sup>nd</sup> Drive
- Cascadia Village Drive extension between Highway 211/Gunderson Road and Arletha Court and between Village Boulevard and Pine Street, providing a connection from Highway 211 to Jacoby Road

Trip generation was estimated assuming all planned growth in the 2029 travel demand model would occur by 2040. Since much of the growth assumed in the 2029 model for the areas in question has not occurred yet, no additional growth was included for 2042 conditions. The final 2042 volumes were adjusted to be consistent with the expected future volumes from the Oregon Department of Transportation's TransGIS website.<sup>1</sup>

For both the 2027 and 2042 analysis years, a low diversion and high diversion scenario was analyzed. The low diversion scenario only included expected local trips accessing the adjacent zones where residential development is expected. The high diversion scenario included additional traffic that may shift off Highway 211, Dubarko Road, and/or 362<sup>nd</sup> Drive with the full connection of Gunderson Road.

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<sup>1</sup> <https://gis.odot.state.or.us/transgis/>

## OPERATION ANALYSIS

Table 1 shows the expected operations of Gunderson Road/Highway 211 intersection in 2027 with the existing two-way stop control (TWSC). Table 2 shows the expected operations in 2042 with TWSC. In 2027, both the low diversion and high diversion scenarios resulted in acceptable intersection operations. In 2042, expected operations in the PM peak hour high diversion scenario reach Level of Service (LOS) F due to the high delay experienced by drivers making a southbound left from Gunderson Road to Highway 211. This movement was expected to grow due to potential diversion from SE 362<sup>nd</sup> Drive and Dubarko Road accessing the Cascadia Village neighborhood. Some of that traffic volume was expected to access the neighborhood via the Cascadia Village Drive extension, which would form the (future) southeast leg of the study intersection, but other traffic was expected to use Highway 211 to access the eastern side of Cascadia Village.

**TABLE 1: YEAR 2027 TWO-WAY STOP CONTROL OPERATIONS AT HIGHWAY 211/GUNDERSON RD**

ALTERNATIVE	MOVEMENT	VOLUME TO CAPACITY	LEVEL OF SERVICE	AVERAGE DELAY (SECONDS)
<b>AM PEAK HOUR LOW DIVERSION</b>	Southbound left	0.02	B	10.9
<b>PM PEAK HOUR LOW DIVERSION</b>	Southbound left	0.05	B	13.5
<b>AM PEAK HOUR HIGH DIVERSION</b>	Southbound left	0.02	B	11.0
<b>PM PEAK HOUR HIGH DIVERSION</b>	Southbound left	0.10	B	14.5

**TABLE 2: YEAR 2042 TWO-WAY STOP CONTROL OPERATIONS AT HIGHWAY 211/GUNDERSON RD**

ALTERNATIVE	MOVEMENT	VOLUME TO CAPACITY	LEVEL OF SERVICE	AVERAGE DELAY (SECONDS)
<b>AM PEAK HOUR LOW DIVERSION</b>	Southbound left	0.06	B	14.4
<b>PM PEAK HOUR LOW DIVERSION</b>	Southbound left	0.14	C	21.0
<b>AM PEAK HOUR HIGH DIVERSION</b>	Southbound left	0.18	C	18.7
<b>PM PEAK HOUR HIGH DIVERSION</b>	Southbound left	0.40	F	51.5



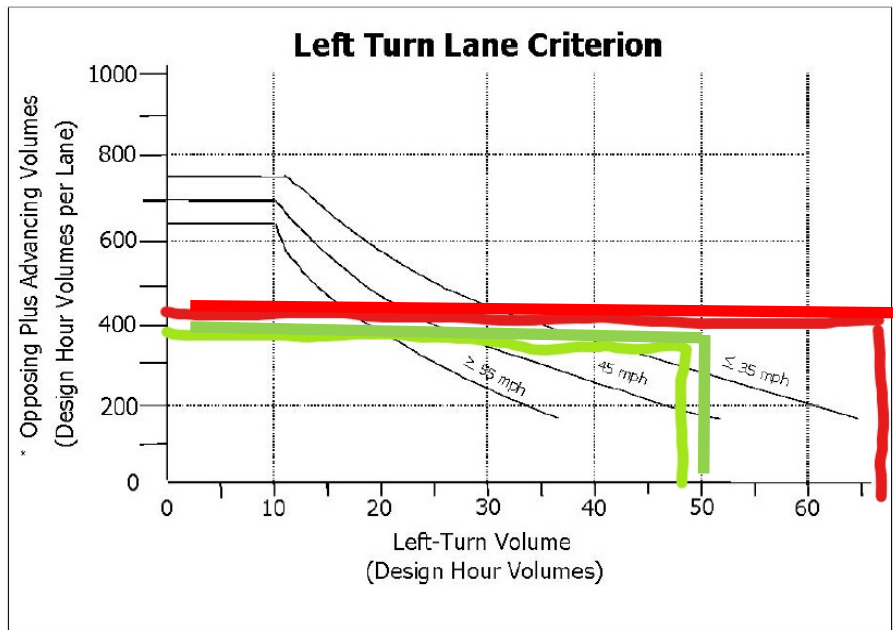
**SAFETY AND SPEED EVALUATION**

The Highway 211/Gunderson Road intersection was evaluated further to explore the need for improvements to address safety concerns. Even though the results of the HCM analysis in Table 1 and Table 2 above indicate that the vehicles turning left off Highway 211 are not expected to experience significant delay, there may be additional safety considerations that warrant the construction of turn lanes at the intersection.

There is no crash data available for Highway 211 and Gunderson Road due to its recent construction. Speed data collected for this analysis in June 2022 found significant speeding issues. The posted speed limit on Highway 211 is 45 miles per hour north of Gunderson Road and 55 miles per hour south of Gunderson Road. The speed data showed the 85th percentile speeds were 68 miles per hour in the southbound direction and 60 miles per hour in the northbound direction. The 85th percentile speed is defined as the speed at or below which 85 percent of all vehicles are observed to travel under free-flow conditions.

**ODOT ANALYSIS PROCEDURES MANUAL CRITERIA**

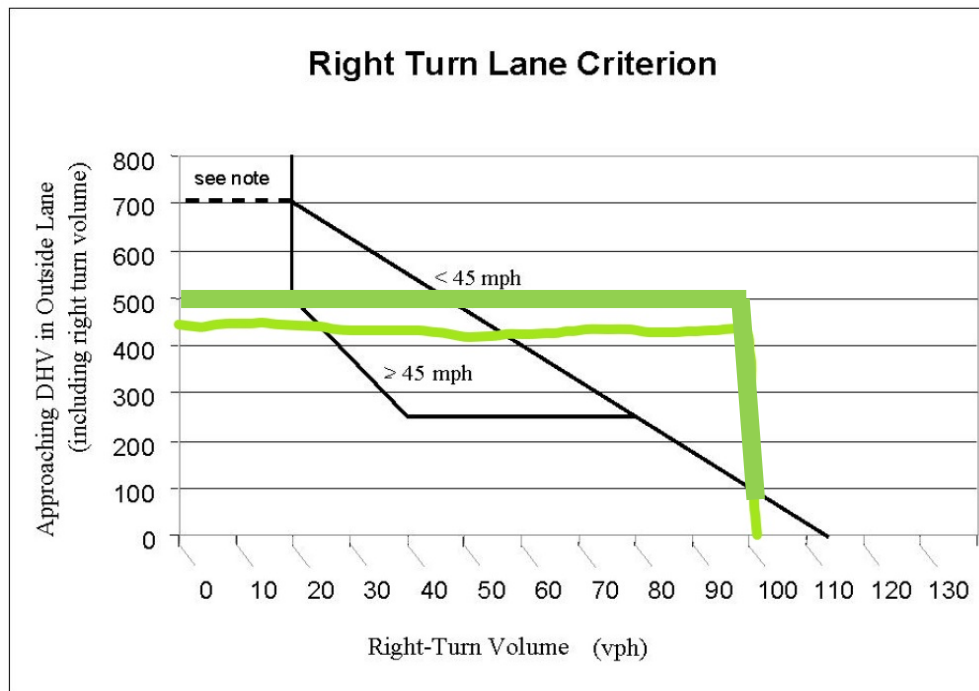
Intersection control and turn lane configuration guidelines are discussed in Chapter 12 of ODOT’s Analysis Procedures Manual (APM). Figure 1 highlights the left turn lane evaluation criteria with the future 2042 PM peak hour Highway 211 southbound approach volume in green and the northbound approach volume in red. Both the northbound and southbound left turn volumes exceeded the criteria and trigger the need for an exclusive left turn lane.



**FIGURE 1: LEFT TURN LANE EVALUATION FOR 2042 PM PEAK HOUR HIGH DIVERSION VOLUMES**



Figure 2 highlights the right turn lane volume criteria for the southbound approach in green. The northbound approach was not evaluated due to the low expected right turning volume. As shown below, the Highway 211 southbound right turning volume would exceed the criteria for providing an exclusive right turn lane.



**FIGURE 2: RIGHT TURN LANE EVALUATION FOR PM 2042 HIGH DIVERSION VOLUMES**

Figure 3 shows the ODOT planning level evaluation for appropriate intersection control based on two-way major and minor street volumes. As shown below with the red line, the estimated planning control for Highway 211 at Gunderson Road is two-way stop control or a single lane roundabout.

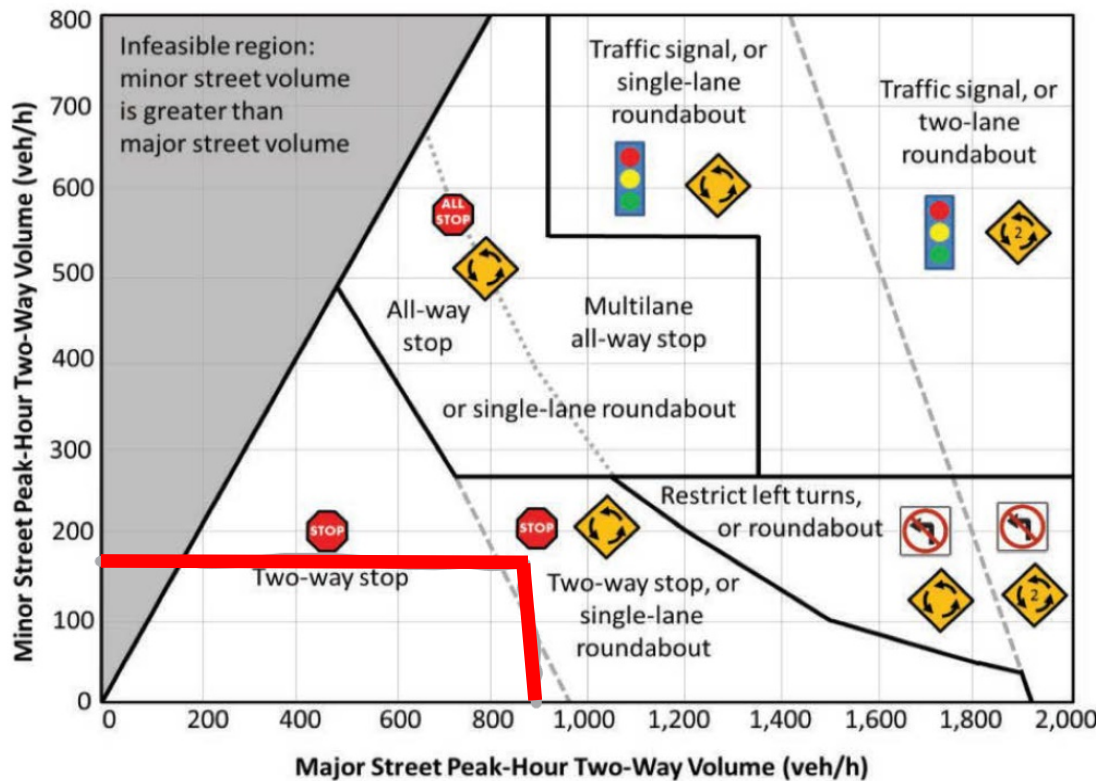


FIGURE 3: PLANNING LEVEL INTERSECTION CONTROL EVALUATION

### ODOT TRAFFIC MANUAL GUIDELINES

The ODOT Traffic Manual<sup>2</sup> recommends exclusive left-turn bays should be considered at all high-speed rural intersections for safety concerns. Based on the speed data, it would be appropriate to provide left turn lanes at intersections on Highway 211.

<sup>2</sup> ODOT Traffic Manual, Section 405, July 2022 Edition.





## SOLUTIONS EVALUATION

Based on the results of the HCM analysis, safety considerations and the guidance from the APM, the following improvement alternatives were analyzed for the 2042 AM and PM peak hour high diversion scenarios.

- Left turn lanes – this solution evaluates the expected intersection operations with an exclusive left turn lane for the southbound, eastbound, and westbound approaches.
- Turn lanes – this solution modifies the “Left turn lanes” solution by adding an additional exclusive turn lane for the westbound right turn movement.
- Roundabout – this solution evaluates the expected intersection operations with roundabout control at the study intersection.

Table 3 summarizes the results of this analysis.

**TABLE 3: POTENTIAL IMPROVEMENT OPERATION RESULTS**

POTENTIAL IMPROVEMENT	ALTERNATIVE	MOVEMENT	VOLUME TO CAPACITY	LEVEL OF SERVICE	AVERAGE DELAY (SECONDS)
<b>LEFT TURN LANES</b>	AM peak hour low diversion	Southbound left	0.17	C	18.3
<b>TURN LANES</b>	AM peak hour high diversion	Southbound left	0.17	C	17.8
<b>ROUNDABOUT</b>	AM peak hour high diversion	Intersection average	-	A	5.2
<b>LEFT TURN LANES</b>	PM peak hour low diversion	Southbound left	0.38	E	37.0
<b>TURN LANES</b>	PM peak hour high diversion	Southbound left	0.35	D	33.0
<b>ROUNDABOUT</b>	PM peak hour high diversion	Intersection average	-	A	6.6

## FINDINGS

A single-lane roundabout at Highway 211/Gunderson Road would provide many benefits based on the analysis results.

- The best LOS that the turn lane solutions provide is D while the roundabout operates at LOS A in the AM and PM high diversion alternative analysis.
- High 85<sup>th</sup> percentile speeds along Highway 211 result in significant safety concerns, A roundabout will provide an additional benefit as a traffic calming measure. Most roundabout designs limit drivers to 15 to 20 miles per hour.
- Based on traffic volumes, there are multiple exclusive turn lanes needed which makes the right-of-way required for a roundabout treatment comparable to the other alternatives.

## ACCESS MANAGEMENT

Highway 211 is classified as a Minor Arterial in the City of Sandy's functional classification. A minor arterial should have 5,280 feet spacing between public streets and 300 feet spacing between private driveway accesses or private driveways and public streets.<sup>3</sup> Spacing was evaluated for Arletha Court/Ponder Lane, Gunderson Road, and the private driveway access at 37730 Highway 211.

- At Arletha Court/Ponder Lane:
  - The spacing to the private driveway (to the south) is approximately 640 feet, greater than the minimum access spacing.
  - The spacing to Gunderson Road is approximately 840 feet, less than the minimum access spacing.

This minimum access spacing for public facilities is larger than recommended and will be reviewed during the ongoing TSP update. Recommended access spacing standards should reflect a hierarchy of functional classifications, with larger spacing requirements for higher classifications and lower spacing requirements for lower classifications. With this in mind, the current spacing is adequate compared to other similarly sized cities.

## ACCESS SAFETY

The last five years of available crash data (2016 to 2020) on the Oregon Transportation Safety Data Explorer<sup>4</sup> was reviewed to identify any crash trends. There were four crashes that occurred in that interval ranging in severity from property damage only to moderate injury. The conditions ranged from dry to icy. None of the crashes were related to an intersection. Based on the above, data there is no systemic safety issue along the segment of Highway 211 from Gunderson Road to

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<sup>3</sup> City of Sandy Transportation System Plan 2011

<sup>4</sup> <https://geo.maps.arcgis.com/apps/webappviewer/index.html?id=df0b3cdb2f1149d3bd43436bc1dd4eac>

Arletha Court. It is important to point out the Gunderson Road intersection was constructed after the available crash data through 2020.

## **SOLUTIONS**

To meet the access spacing standard for public streets, the closest public street intersection from Gunderson Road should be where Sandy Heights Street would cross Highway 211. To meet this standard, the intersections at Arletha Court/Ponder Road, Village Boulevard, Bornstedt Road, and Dubarko Road would be closed. This is not a feasible improvement and as noted above the spacing standard is longer than recommended; however, access along Highway 211 from these intersecting roads can be managed. The following project is identified in the solutions for the current Sandy TSP update and will complement the extension of Cascadia Village Drive to Highway 211, which will provide access for the closed movement.

- Arletha Court – Project D11: Reduce northbound congestion. Project may include signage and approach modifications to prohibit left turns from the minor street approach.
  - In addition to the project proposed in the TSP, it is also recommended to restrict access to the north leg of the intersection (Ponder Lane) to only emergency vehicles. With the completion of the street network in the Shaylee Meadows subdivision, vehicles from Ponder Lane now have access to Dubarko Road and Highway 211 via Melissa Avenue and Gunderson Road. This crossing can now provide bicycle and pedestrian access from Cascadia Village to downtown Sandy without using Highway 211.

This project would funnel left turning movements out of the Cascadia Village subdivision onto Village Boulevard and the Cascadia Village Drive extension. As noted above, the Cascadia Village Drive extension is recommended to be roundabout controlled and provides an LOS improvement compared to two-way stop control. This control type would work better with the additional traffic volume that is expected to shift from Arletha Court. At the Village Boulevard intersection, there is already a westbound left turn pocket of approximately 380 feet that should attract most left turning movements, as opposed to Arletha Court. The intersection also falls along a straight stretch of Highway 211 with greater driver visibility compared to the curves at Arletha Court and Bornstedt Road.

## SPEED ANALYSIS

The recently collected speed data indicated that most vehicles are travelling in excess of the posted speed near the intersection of Highway 211 and Gunderson Road. Table 4 shows those results. The posted speed limit on Highway 211 is 45 miles per hour north of Gunderson Road and 55 miles per hour south of Gunderson Road.

**TABLE 4: SPEED CLASSIFICATION RESULTS AT HIGHWAY 211 AND GUNDERSON ROAD<sup>5</sup>**

DIRECTION	AADT (VEHICLES)	85 <sup>TH</sup> PERCENTILE SPEED (MPH)	EXCESS OF POSTED SPEED	AVERAGE SPEED (MPH)
<b>SOUTHBOUND HIGHWAY 211 SOUTH OF GUNDERSON</b>	2,486	62	93%	54
<b>SOUTHBOUND HIGHWAY 211 NORTH OF GUNDERSON</b>	2,477	68	96%	59
<b>NORTHBOUND HIGHWAY 211 SOUTH OF GUNDERSON</b>	2,553	60	95%	54

The NACTO Urban Street Design Guide<sup>6</sup> and FHWA Engineering Speed Management Countermeasures<sup>7</sup> were reviewed to identify potential speed reduction treatments on Highway 211 both north and south of Gunderson Road. Treatments to consider that are appropriate for rural high-speed roadway segments are summarized below.

- Roundabout control at key intersections would reduce vehicle speeds and limit severe injury and fatality collisions.
- Reduced lane width with pavement markings would narrow travel lanes and encourage drivers to slow down.
- Raised or painted islands in the median area can narrow travel lanes and be combined with access management treatments to provide additional safety benefits. A raised median on Highway 211 west of Village Boulevard could reduce lane widths and channelize drivers.
- Rumble strips are raised or grooved patterns installed to prevent drivers from leaving the roadway and drawing attention to lane position. Highway 211 has a rumble strip along the centerline both north and south of Gunderson Road. Additional rumble strips could be installed along the shoulders to improve speed management.

<sup>5</sup> Data for northbound Highway 211 north of Gunderson is not available.

<sup>6</sup> <https://nacto.org/publication/urban-street-design-guide/design-controls/design-speed/speed-reduction-mechanisms>

<sup>7</sup> [https://safety.fhwa.dot.gov/speedmgt/ref\\_mats/eng\\_count/2014/reducing\\_speed.cfm](https://safety.fhwa.dot.gov/speedmgt/ref_mats/eng_count/2014/reducing_speed.cfm)



- Driver speed feedback sign would provide drivers with information about their speed in relationship to the posted speed limit.

If a roundabout is constructed at Gunderson Road, additional speed reduction treatments like installing rumble strips and raised medians are no longer needed. In addition to constructing physical improvements, a speed study should be conducted on Highway 211 to determine the appropriate posted speed limit. The roadway is under city jurisdiction which provides flexibility in setting the posted speed limit.

## IMPROVEMENT RECOMMENDATIONS

The following improvements are recommended for Highway 211 near Gunderson Road to address safety and operational concerns.

- Construct a single-lane roundabout at Gunderson Road to provide adequate capacity to accommodate future growth and reduce vehicle speeds on Highway 211.
- With future development, extend Cascadia Village Drive west to serve as the fourth leg of the Highway 211/Gunderson Road intersection.
- Close the Ponder Lane approach to Highway 211, open to emergency vehicles/pedestrian/bicycle access only.
- Prohibit northbound left turn movements at Highway 211/Arletha Court.
- Conduct a speed study on Highway 211 to set the appropriate posted speed.



PROJECT NAME • NAME OF MEMORANDUM • DATE

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