

DATE: November 2020  
 TO: Infrastructure Funding Plan Toolkit Reviewer  
 FROM: ECONorthwest  
 SUBJECT: Summary of Existing Funding Plan Planning Processes

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As a first step in developing the Infrastructure Funding Toolkit, ECONorthwest collected and reviewed six existing funding plans<sup>1</sup> developed for urban reserve and newly urbanizing areas across Washington County. Exhibit 1 documents the details of that review to highlight the variations and similarities among each plan. It may help the reviewer conceptualize the type and level of analysis typically included in funding plans. The Infrastructure Funding Toolkit identifies key takeaways from this review in Chapter 1.

**Exhibit 1. Comparative Analysis of Existing Funding Plans for New Urban Areas in Washington County**

Source: Summarized by ECONorthwest, using the Title 11 funding plans identified in the blue header.

Funding Plan	URA 6D: Funding Strategy	River Terrace Funding Strategy	South Hillsboro Community Plan	Evergreen Concept Plan	Sherwood West Preliminary Concept Plan	South Cooper Mt. Infrastructure Funding Plan
<b>Geography</b>	URA 6D, King City	River Terrace, Tigard	South Hillsboro, Hillsboro	Evergreen, Hillsboro	Sherwood West, Sherwood	South Cooper Mountain, Beaverton
<b>Date</b>	May 1, 2018	December 2014	December 2014	November 6, 2007	February 4, 2016	Sept. 2, 2014
<b>Purpose</b>	Concept Planning	Comprehensive Planning	Concept Planning	Concept Planning	Preliminary Concept Planning	Comprehensive Planning
<b>Primary Deliverable</b>	Standalone memo	Standalone report	Chapter within report	Section within report	Chapter within report	Standalone report

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<sup>1</sup> As part of one preliminary concept plan, three concept plans, and two community plans.

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<b>Generalized Table of Contents</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Infrastructure Categories</li> <li>▪ Infrastructure Cost Estimates</li> <li>▪ Allocation of Infrastructure Costs</li> <li>▪ Supplemental Fee for Framework Infrastructure</li> <li>▪ Conclusions and Next Steps</li> </ul>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Methodology</li> <li>▪ Funding Strategy *</li> <li>▪ Policy Considerations</li> <li>▪ Appendix</li> </ul> <p><i>* Sub-sections organized by infrastructure type</i></p>	<ul style="list-style-type: none"> <li>▪ Overview</li> <li>▪ Infrastructure Costs</li> <li>▪ Infrastructure Funding Strategies and Responsibilities</li> <li>▪ Supplemental Funding Options</li> </ul>	<ul style="list-style-type: none"> <li>▪ Infrastructure Costs *</li> <li>▪ Financing Methods</li> </ul> <p><i>* Sub-sections organized by infrastructure type and include cost and revenue details</i></p>	<ul style="list-style-type: none"> <li>▪ Phasing</li> <li>▪ Funding Development in Sherwood West</li> <li>▪ Evaluation of New Funding Tools</li> <li>▪ Next steps and recommendations followed in Ch 8.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Methods</li> <li>▪ Funding Plan*</li> <li>▪ Implications</li> </ul> <p><i>* Sub-sections organized by infrastructure type</i></p>
<b>Timing and Phasing</b>	<p>Implementation schedule: unknown.</p> <p>Phasing considerations were explored.</p>	<p>20 years plan, revised every five years</p> <p>Strategies organized in two phases (near-term and long-term)</p>	<p>Implementation schedule: unknown.</p> <p>Phasing considerations were explored.</p>	<p>About a 20-year planning horizon</p> <p>Implementation schedule / financing schedule was not explicitly defined</p>	<p>50-year plan horizon</p> <p>Phased infrastructure delivery of six sub-areas.</p>	<p>The Plan will be implemented over the course of several decades.</p>
<b>Funding Tools and Options Identified in Plan</b>	<p>Supplemental fee, SDCs, LID, property tax levies/GO bonds, utility fees</p> <p><i>Other:</i> developer and property owner contributions</p>	<p>SDCs, TDT, LID, reimbursement districts, utility fees, urban renewal, special taxing districts, bonds, general funds</p> <p><i>Other:</i> developer dedications, loans and grants</p>	<p><i>Existing:</i> SDCs, TDT</p> <p><i>New:</i> property tax, MSTIP, increased SDCs/TDT rates, supplemental SDC, LID, grants/donations</p>	<p><i>Existing:</i> SDCs, impact fees, MSTIP, STIP</p> <p><i>New:</i> urban renewal (tax increment finance), LID, ODOT Ped. and Bicycle Program, U.S. TE Program, IOF</p> <p><i>Other:</i> developer contributions</p>	<p><i>Existing:</i> SDCs, TDT, MSTIP</p> <p><i>New:</i> property tax: GO bonds, supplemental SDCs, LID, utility Fee</p> <p><i>Other:</i> acquire land and hold it for future development</p>	<p><i>Existing:</i> SDCs, TDT, MSTIP</p> <p><i>New:</i> supplemental SDC or other transportation fee</p> <p><i>Other:</i> developer contributions</p>

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<b>Project Costs</b>	<p>\$88.1m</p> <ul style="list-style-type: none"> <li>Transportation \$57.3m</li> <li>Sewer: \$7.3m</li> <li>Water: \$8.3mm</li> <li>Park: \$15.2m</li> </ul>	<p>\$228.5m</p> <ul style="list-style-type: none"> <li>Water: \$17.6m</li> <li>Sewer: \$11.8m</li> <li>Parks: \$27.4m</li> <li>Stormwater: \$22.1m</li> <li>Transportation: \$149.6m</li> </ul> <p><i>Detailed cost assumptions presented in an appendix.</i></p>	<p>\$375.1m</p> <ul style="list-style-type: none"> <li>Water: \$22.7m</li> <li>Sanitary Sewer: \$22m</li> <li>Transportation: \$225m</li> <li>Open Space Amenities: \$105.4m</li> </ul> <p><i>Costs also broken out by sub-area; costs were planning level estimates</i></p>	<p>\$59.7m - \$62.7m</p> <ul style="list-style-type: none"> <li>Transportation: \$51.6m</li> <li>Water: \$4.4m</li> <li>Sanitary Sewer: \$3.7–\$6.7m</li> </ul>	<p>\$135m - \$195m</p> <p>Total costs broken out by sub-area:</p> <p>A: \$35-50m  B: \$35-50m  C: \$65-95m  D: no estimate  E: no estimate  F: no estimate</p>	<p>\$252.4m</p> <ul style="list-style-type: none"> <li>Parks: \$37.5m</li> <li>Water: \$21.6m</li> <li>Sanitary Sewer: \$44.9m</li> <li>Stormwater: \$36m</li> <li>Transportation: \$112.4m</li> </ul>
<b>Identified Funding Gap</b>	<p>Gap: total costs (no existing revenue sources)</p>	<p>Transportation gap: \$2.4m in the near-term, addressed in later years when more funding is collected.</p> <p>Revenues matched costs for all other infrastructure types (with some new tools or increased rates needed)</p>	<p>Transportation gap: \$155.7m (addressed via new funding tools and regional share approach)</p> <p>Open space amenities gap: \$74m (addressed through new funding tools)</p>	<p>No gap projected, some surplus TIF dollars</p>	<p>Not determined</p>	<p>Revenues matched or exceeded costs for all other infrastructure types (with some developer contributions needed)</p>

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<b>How Revenue Capacity was Presented</b>	Lump sum revenue capacity presented	Revenue projections were presented by tool, by phase, and by infrastructure type in the Plan.  More detailed infrastructure fund assumptions were presented in an Appendix by year.	Plan presents conceptual revenue estimates in lump sums to compare to costs.	Lump sum revenue capacity presented for TIF.	No revenue projections or allocation of funds to specific projects.	Lump sum revenue capacity presented in main document, by infra. type.  For transportation: Detailed revenue projections by source, project, and phase presented in an appendix.
<b>Evaluation of New Tools</b>	Some funding tool considerations explored	Funding tool evaluation presented using 6 criteria	Some funding tool considerations explored in the plan; several tools were considered during the development process but removed from further consideration.	Some funding tool considerations explored	Funding tool evaluation presented using 8 criteria	Not presented

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<p><b>High-level Summary of Funding Strategy</b></p>	<p>Plan focused on funding “framework infrastructure” (large projects that benefit large areas) by imposing a supplemental fee on residential and commercial developers.</p> <p>Subdistrict pump stations/force mains and subdistrict stormwater facilities would be built and paid for by developers.</p> <p>Pay for community park with SDCs through the City’s CIP program.</p>	<p>Infrastructure paid for by a range of existing and new funding sources, reevaluated every five years.</p>	<p>Use of existing SDCs was the primary funding strategy for each infrastructure type. Transportation infrastructure would also rely on new or regional funding tools.</p>	<p>SDCs, TIF, and developer contributions expected to meet and exceed total costs. The plan outlined other common tools for the City to explore if they want to make development in the area more attractive.</p>	<p>Use a mix of new and existing funding tools that come from local (City and private developer) and regional (County and possibly Metro) sources.</p> <p>Maximize revenue from existing sources before turning to new sources.</p>	<p>Parks, water, sewer funded by SDCs and developer contributions.</p> <p>The City, Clean Water Services, and developers to take a regional facility approach to funding stormwater; or a site-specific approach if seed-money is insufficient.</p> <p>Transportation funded by TDT, MSTIP, developer contributions, and supplemental SDC.</p>