



## CITY COUNCIL REGULAR SESSION AGENDA

**TUESDAY, APRIL 2, 2024**

**VIA ZOOM & 945 WEST GRANT STREET, CARLTON OR**

*The Mission of the City of Carlton is to safeguard and enhance the vitality and livability of the community by providing essential services with professionalism and integrity.*

### **7:00 PM CITY COUNCIL REGULAR MEETING**

**Page**

#### **1. CALL TO ORDER**

#### **2. ROLL CALL**

#### **3. PLEDGE OF ALLEGIANCE**

#### **4. CHANGES OR ADDITIONS TO THE AGENDA**

#### **5. CEREMONIES/APPOINTMENTS/ANNOUNCEMENTS**

A. Planning Commissioner vacancy fulfillment

2

B. Juliette's House request

5

#### **6. CITIZEN COMMENTS**

*This section of the agenda allows members of the public to address the City Council on any items off or on the agenda. When invited by the Mayor, members of the public shall come forward, state their name and street address, and direct all comments to the Mayor. Comments are typically limited to three (3) minutes unless additional time is allowed by the Mayor.*

A. Items NOT on Agenda

B. Items on the Agenda

#### **7. CONSENT AGENDA**

A. Meeting Minutes – *Approve*

1. City Council – March 5, 2024

7

B. Accounts Payable report

10

C. Finance reports

12

D. Carlton Clean-up Day event

18

E. Department Promotion

19

F. Pool Update

20

#### **8. ORDINANCES/RESOLUTIONS/DISCUSSION/ACTION ITEMS**

A. LA 2024-01; Comprehensive Plan Amendment Public Hearing

22

B. Ordinance No. 2024-749

163

C. Community grant awards

168

D. Engineering RFQ Award Recommendation

184

E. Community Room discussion and application review

233

F. Recreational Immunity Update

246

G. General Ledger Request

248

H. Lower Park Dog Leash Requirement

251

#### **9. ADJOURNMENT**

**The public is encouraged to join the meeting virtually using Zoom due to a lack of seating space available in the meeting room. Please use the following directions:**

To join using a computer, please use this link:

<https://us02web.zoom.us/j/85166922242?pwd=SmlqY0RuT0FZaGZiY3dUOWRRWIF1UT09>

To join using a phone, call: 1-253-215-8782 and enter Meeting ID: **851 6692 2242** and enter Passcode: **388666**

*This facility is ADA accessible.*

*If you need special accommodations, please contact the City Recorder at 503.852.7575 at least 48 hours prior to this meeting.*



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**To:** The Mayor and Members of the City Council  
**From:** Aimee Amerson, City Recorder  
**Subject:** Planning Commissioner Appointment  
**Date:** April 2, 2024

### **Recommended Motion**

It is MOVED that the City Council appoint Jose Chavez to the Planning Commission completing the term vacated by Commissioner Geck expiring on December 31, 2026.

### **Background**

Commissioner Geck resigned from the Planning Commission in December 2023 with the term expiring December 31, 2026.

City staff publicized the vacancy starting in December 2023, which had a closing date of March 15, 2024.

Staff has received one application to fill the vacancy during that time. The applicant is Jose Chavez, who is a Carlton resident whom resides within the City limits.

Per Ordinance 2021-734, the updated Planning Commission administration Ordinance, vacancies are filled by a majority vote of the City Council upon one accepted application.

### **Alternatives**

1. Do not appoint and re-post the vacancy.

### **Fiscal Impact**

None.

### **Exhibits**

- Jose Chavez application



# Application for Boards/Commission

## Contact Information

Name:	Jose G Chavez
Street Address:	661 W Johnson St.
Mailing Address:	[REDACTED]
City/State/Zip Code:	Carlton, OR 97111
Cell Phone:	[REDACTED]
Work Phone:	[REDACTED]
E-Mail Address:	[REDACTED]

## Background

Years of Residence in Carlton:	2 years and 8 months
Place of Employment:	JH Kelly, LLC - Longview, WA 98632
Occupation:	Project Engineer
Educational Background:	BS Civil Engineer UABC 1980
Prior Civic Activities:	Volunteer at the Newerg Public Library Treasurer at the Oaks at Springbrook HOA Board of Directors - Newberg.

## Boards/Commissions of Interest

Please check which Boards/Commission your requesting to serve on:

- City Council
- Budget Committee
- Planning Commission
- Visit Carlton Tourism Committee
- Ad-hoc Advisory Committee

### Special Skills or Qualifications

Summarize any special training, skills or experience you may have pertinent to the Board/Commission to which you are applying.

Project Engineer at large industrial construction projects - 44 years of experience. Proficient on reading and interpreting drawings, specifications and building codes.

### Motivation

Discuss your motivation for serving on this Board/Commission.

We are new in Carlton. We love this place and its people. Ready to retire in September. Want to be active part of the community and help to make it a better place.

### Special Notice

Please be advised that members of the City Council and Planning Commission are required to file an annual **Statement of Economic Interest** with the State of Oregon. A sample reporting form is available from Carlton City Hall indicating the type of information you will be required to disclose if you are appointed.

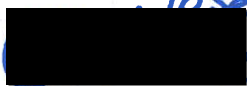
### Agreement and Signature

By submitting this application, I affirm that the facts set forth in it are true and complete. I understand that if I am accepted as a volunteer, any false statements, omissions, or other misrepresentations made by me on this application may result in my immediate dismissal.

Name (printed)

Jose G. Chavez

Signature



Date

02.28.2024

### Our Policy

It is the policy of the City of Carlton to provide equal opportunities without regard to race, color, religion, national origin, gender, sexual preference, age, or disability. The City of Carlton accepts applications from potential board/commission members throughout the year and will hold applications until vacancies exist on specific boards/commissions.

Thank you for completing this application form and for your interest in volunteering with us.



Date: March 21, 2024

From: Juliette's House Child Abuse Intervention Center

RE: National child Abuse Prevention Month (April 2024)

Request:

For 2024, we hope to make more of an impact with pinwheels and signage by creating Pinwheel Installations throughout the county. We will be encouraging people to visit the installations and take photos of themselves and post their location and tag Juliette's House.

Pinwheel Installations will be comprised of a 2 x 3 feet banner zip-tied to two stakes and 317 pinwheels. Each pinwheel represents 10 children who attended prevention education in Yamhill County in FY 2022-23.

Our preference in location is somewhere visible and accessible to many. The park where the pool is located would be ideal. We would have staff and volunteers helping with the installation and would follow any directions for placement. If approved, we would create the installation within a short window of time. We will have staff and volunteers remove the installation at the end of April.

Thank you for your consideration.

Smiles,

Diane Longaker

Juliette's House - Community Engagement Director



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**City Council Work Session Minutes**  
**Tuesday, March 5, 2024**  
**Via Zoom and at 945 W Grant Street, Carlton, Oregon**

**WORK SESSION****6:00 PM****1. CALL TO ORDER and ROLL CALL**

Mayor Linda Watkins called the meeting to order at 6:00 PM.

**ROLL CALL**

**Members Present:** Mayor Linda Watkins, Council President Kevin Skipper, Councilors Grant Erickson, Guilherme Brandão, Carolyn Thompson-Rizer, and David Samuel Hill.

**Members Absent:** Councilor Shirley Ward-Mullen

**Staff Present:** City Manager Shannon Beaucaire, City Attorney Tyler Yeoman-Millette, City Planner Scott Whyte, City Recorder Aimee Amerson, and Utility Billing Specialist Ashlee Boyd

**Others Present:** Susan Turrell, Robin Geck, Ed Anderson, and Marie Frugia

**A. Changes to the Agenda**

None.

**2. WORK SESSION AGENDA ITEMS****6:02 PM****A. Draft Development Code Update – City Planner Scott Whyte**

City Planner Scott Whyte gave a presentation about the development code update items still needing Council recommendations. Councilors had questions regarding the types of trees and also about the placement, specifically about how the city would enforce trees/shrubs that were placed on private property. Whyte advised that the code directs developers to plant those trees/shrubs, but that he has not seen anything in place giving the city authority over a homeowner's choice to remove the trees. Councilors also questioned potential City liability if a tree the City required to be planted were to damage a home. City Attorney Tyler Yeoman-Millette stated that, much like the city mandates the planning portion of building of houses in the city, the city is not held liable if the house burns down. Commissioner Turrell recommended changing the standard planting from every 50 feet to be changed to every 25 feet. Council discussed and decided on a maximum of 40 feet of spacing between trees.

Whyte then moved on to discuss code regarding commercial lodging within the commercial business zones.

Councilors asked questions and received clarification on topics like vacation rental regulations, commercial business zone versus industrial business zone and clarification on allowing a hotel in a zone where vacation rentals are not allowed.

**3. FUTURE WORK SESSION AGENDA ITEMS**

None.

**4. ADJOURNMENT****7:57 PM**

The Work Session meeting adjourned at 7:57 PM.

**APPROVED** by the City of Carlton City Council on April 2, 2024.

ATTEST:

\_\_\_\_\_  
 Ashlee Boyd, Utility Billing Specialist

\_\_\_\_\_  
 Linda Watkins, Mayor



**City Council Minutes**  
**Tuesday, March 5, 2024**  
**Via Zoom and at 945 W Grant Street, Carlton, Oregon**

**REGULAR MEETING****8:00 PM****1. CALL TO ORDER**

Mayor Linda Watkins called the regular meeting to order at 8:00 PM.

**2. ROLL CALL**

**Members Present:** Mayor Linda Watkins, Council President Kevin Skipper, Councilors Grant Erickson, Guilherme Brandão, Carolyn Thompson-Rizer, and David Samuel Hill.

**Members Absent:** Councilor Shirley Ward-Mullen

**Staff Present:** City Manager Shannon Beaucaire, City Attorney Tyler Yeoman-Millette, City Recorder Aimee Amerson, and Utility Billing Specialist Ashlee Boyd.

**Others Present:** Susan Turrell

**3. PLEDGE OF ALLEGIANCE****8:00 PM**

The Pledge of Allegiance was performed.

**4. CHANGES OR ADDITIONS TO THE AGENDA****8:00 PM**

None.

**5. CEREMONIES, APPOINTMENTS, AND ANNOUNCEMENTS****8:01 PM**

None.

**6. CITIZEN COMMENTS****8:01 PM**

- A. Items NOT on the Agenda** - None
- B. Items on the Agenda** - None

**7. CONSENT AGENDA****8:02 PM****A. Meeting Minutes – Approved**

City Council – February 6, 2024 (Work and Regular Session)

**B. Accounts Payable report**

Councilor Brandao requested clarification on the Financial Report, specifically GL titles, City Planner fees, and the cost of the contracted IT service. City Manager Shannon Beaucaire clarified some of his questions and asked for time to look into some of the expenses and will return with the answers to those questions.

**C. Finance reports****D. Mayor’s February Report**

**MOTION: Skipper/Erickson:** to approve the consent agenda including City Council meeting minutes from February 6, 2024, the accounts payable report, the financial reports, Mayor’s Report as submitted. Motion Carried (6 Yes/ 0 No / 1 Absent [Ward-Mullen] /0 Abstain).

**8. ORDINANCES/RESOLUTIONS/DISCUSSION/ACTION ITEMS****8:08 PM****A. Nomination Ordinance No. 2024-749**

City Attorney Tyler Yeoman-Millette presented information about adopting Ordinance No. 2024-749 and that the City Council would adopt the state rules for nominations.

**MOTION: Skipper/Hill:** it is moved that the City Council authorize the reading of Ordinance No. 2024-749 by title. Motion Carried (6 Yes/ 0 No / 1 Absent [Ward-Mullen] /0 Abstain).

**MOTION: Skipper/Hill:** it is moved that the City Council accept the first reading of Ordinance No. 2024-749. Motion Carried (6 Yes/ 0 No / 1 Absent [Ward-Mullen] /0 Abstain).

**B. Psilocybin Discussion****8:12 PM**

City Attorney Tyler Yeoman-Millette presented information on the history and what it would mean to allow or not allow a psilocybin business to set up in Carlton. He presented the Councilors with options on what may be done with current state rules. Councilors discussed all options given by the City Attorney.

**MOTION: Thompson-Rizer/Hill:** moved to not take any kind of action for the moment regarding psilocybin.

Motion Carried (4 Yes/ 2 No [Skipper, Erickson]/ 1 Absent [Ward-Mullen] /0 Abstain).

**C. Fun Days Discussion**

Mayor Linda Watkins spoke with Council about what their involvement with Carlton Fun Days looks like this year – especially since it will be the 125<sup>th</sup> birthday of Carlton. Councilors discussed ideas such as parade participation and setting up a booth at the event. Mayor Watkins encouraged all Councilors to show up and participate. Councilor Hill noted that he will meet with the committee for Fun Days and see if there is anything specific that they would like councilors to help with and then get back to City Manager Beaucaire on what was discussed so that she can pass that information on to the Councilors.

**D. Civic Center opening, planning and coordination****8:56 PM**

City Manager Shannon Beaucaire presented a calendar and a timeline of events to Councilors that detailed what the opening, planning and coordination of the Civic Center will look like. She also recommends canceling the July 2024 City Council meeting due to schedule complications for both staff and Councilors. Council agreed to cancel the July 2024 meeting and the soft opening Civic Center schedule Beaucaire proposed.

**E. Schedule City Manager evaluation****9:09 PM**

Councilors noted that they would like to schedule the manager evaluation before at the April meeting. City Manager Beaucaire suggested that they use the April Work Session meeting time to do the Executive session evaluation, followed by the Regular City Council meeting at 7pm. Council agreed to these meeting times.

**ADJOURNMENT****9:13 PM**

The Regular Session meeting adjourned at 9:13 PM.

**APPROVED** by the City of Carlton City Council on April 2, 2024.

ATTEST:

\_\_\_\_\_  
Ashlee Boyd, Utility Billing Specialist

\_\_\_\_\_  
Linda Watkins, Mayor

# Accounts Payable

## Checks by Date - Summary by Check Date

User: aamerson  
 Printed: 3/25/2024 7:07 AM

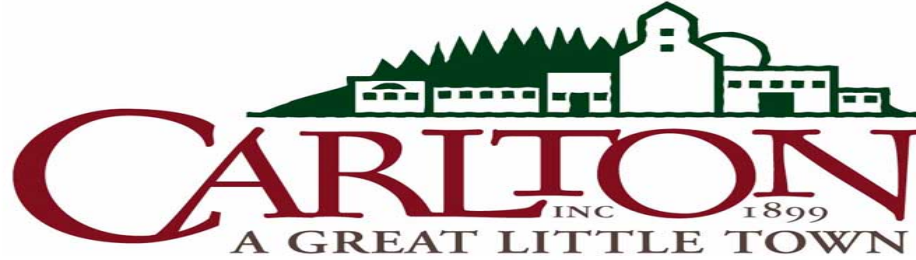


Check No	Vendor No	Vendor Name	Check Date	Check Amount
10005		Attention: Voya Institutional Plan Services	03/05/2024	925.76
10004		Attn: Voya Institutional Plan Services VOY	03/05/2024	1,825.00
9100		PERS	03/05/2024	11,810.34
OreRev		Oregon Dept. of Revenue	03/05/2024	3,701.54
9981		EFTPS	03/05/2024	12,524.31
9985		CIS	03/05/2024	31,111.99
Total for 3/5/2024:				61,898.94
CasInc		Caselle, Inc.	03/06/2024	340.00
CenLin		CenturyLink	03/06/2024	615.16
CIT		CIT First-Citizens Bank & Trust Co	03/06/2024	161.00
CitSwe		City Sweepers, LLC.	03/06/2024	575.00
Comcas		Comcast	03/06/2024	77.93
CraRoc		Crabtree Rock Company, Inc.	03/06/2024	1,293.52
DatPro		Dataprose	03/06/2024	694.06
EdgAna		Edge Analytical Inc	03/06/2024	338.00
FlaSta		Flagstar Public Funding Corp.	03/06/2024	683,444.90
HauRue		Haugeberg, Rueter, Gowell	03/06/2024	5,429.75
OnliNW		Hunter Communications	03/06/2024	491.25
McCSco		McClure and Sons, Inc.	03/06/2024	88,587.50
UB*00579		Mary Meyers	03/06/2024	37.30
NewReg		News-Register	03/06/2024	152.34
NexCle		Nexus Commercial Cleaning LLC	03/06/2024	1,046.00
OneCal		One Call Concepts, Inc.	03/06/2024	71.40
OreRevCT		Oregon Department Of Revenue	03/06/2024	100.00
PorGen		Portland General Electric	03/06/2024	3,904.58
PriSys		Primisys	03/06/2024	5,388.40
PrinNW		Print NW	03/06/2024	69.00
Reece		Reece Complete Security Solutions	03/06/2024	128,879.56
SieSpr		Sierra Springs	03/06/2024	117.40
TetTec		Tetra Tech, Inc	03/06/2024	24,755.84
TexGra		Textile Graphics Unlimited Inc.	03/06/2024	2,357.70
UsaBlu		USABlueBook	03/06/2024	402.98
VerWir		Verizon Wireless	03/06/2024	830.09
WebHea		Webster Heating & A/C, LLC	03/06/2024	956.00
YamCom		Yamhill Communications Agency	03/06/2024	2,433.58
YamShe		Yamhill County Sheriff's Office	03/06/2024	64.00
Total for 3/6/2024:				953,614.24
FirFedCC		First Federal Card Services	03/07/2024	12,031.73
Total for 3/7/2024:				12,031.73
3JCon		3J Consulting	03/13/2024	3,641.00
AirNor		Airgas USA, LLC	03/13/2024	244.62

Check No	Vendor No	Vendor Name	Check Date	Check Amount
BoyPai		Boys Painting LLC	03/13/2024	400.00
VinBou		Brian Richardson	03/13/2024	700.00
CIT		CIT First-Citizens Bank & Trust Co	03/13/2024	350.00
ConSys		Control Systems NW LLC	03/13/2024	17,999.80
DavAut		Davison Auto Parts	03/13/2024	3.01
DraAwa		Drain Away Rooter	03/13/2024	1,095.00
EngGif		Engraving, Gifts & Awards	03/13/2024	1,275.18
JenStr		Jensen Strategies, LLC	03/13/2024	7,055.05
LesSch		Les Schwab Tire Center	03/13/2024	122.72
CouGov		Mid-Willamette Valley Council Of Governr	03/13/2024	6,286.50
NewReg		News-Register	03/13/2024	273.02
PorGen		Portland General Electric	03/13/2024	6,544.62
PrinNW		Print NW	03/13/2024	127.00
RecWes		Recology Western Oregon	03/13/2024	480.15
Reece		Reece Complete Security Solutions	03/13/2024	82.50
SAIF		SAIF Corporation	03/13/2024	235.85
TranRis		Data Solutions, Inc TransUnion Risk and A	03/13/2024	75.00
UB*00580		Sue & Sam White	03/13/2024	40.00
WilFar		Wilco Farmers	03/13/2024	2,385.24
Total for 3/13/2024:				49,416.26
9981		EFTPS	03/20/2024	12,611.54
OreRev		Oregon Dept. of Revenue	03/20/2024	3,737.42
9100		PERS	03/20/2024	11,877.45
10004		Attn: Voya Institutional Plan Services VOY	03/20/2024	1,825.00
10005		Attention: Voya Institutional Plan Services	03/20/2024	925.76
Total for 3/20/2024:				30,977.17
Report Total (62 checks):				1,107,938.34

General Ledger  
Trial Balance by Acct Type

User: cmartinez  
Printed: 3/22/2024 2:59:50 PM  
Period 01 - 09  
Fiscal Year 2024



Sort Level	Description	Budget	Beg Bal	Debits	Credits	End Bal
<b>001</b>	<b>General</b>					
Revenue	Revenue					
R1	Revenue	2,003,447.00	0.00	55,553.79	1,375,495.05	1,319,941.26
Revenue	Revenue	2,003,447.00	0.00	55,553.79	1,375,495.05	1,319,941.26
Expense	Expense					
001	Administrative					
05	Personal Services	63,352.00	0.00	47,147.89	0.00	47,147.89
06	Materials & Services	94,000.00	0.00	79,652.98	173.87	79,479.11
09	Transfers	250,564.00	0.00	0.00	0.00	0.00
001	Administrative	407,916.00	0.00	126,800.87	173.87	126,627.00
002	Finance					
05	Personal Services	124,180.00	0.00	99,969.43	2,600.00	97,369.43
06	Materials & Services	137,800.00	0.00	106,732.27	7.85	106,724.42
07	Capital Outlay	0.00	0.00	0.00	0.00	0.00
08	Contingencies	246,266.00	0.00	0.00	0.00	0.00
09	Transfers	0.00	0.00	227,815.00	0.00	227,815.00
002	Finance	508,246.00	0.00	434,516.70	2,607.85	431,908.85
003	LandUse and Planning					
05	Personal Services	33,400.00	0.00	26,372.67	0.00	26,372.67
06	Materials & Services	128,850.00	0.00	151,969.46	4,388.00	147,581.46
003	LandUse and Planning	162,250.00	0.00	178,342.13	4,388.00	173,954.13
004	Police					
05	Personal Services	559,400.00	0.00	422,607.25	0.00	422,607.25
06	Materials & Services	153,500.00	0.00	89,656.52	6,081.07	83,575.45
07	Capital Outlay	0.00	0.00	0.00	0.00	0.00
004	Police	712,900.00	0.00	512,263.77	6,081.07	506,182.70
005	Municipal Court					
05	Personal Services	30,275.00	0.00	15,002.96	0.00	15,002.96
06	Materials & Services	21,250.00	0.00	19,636.00	6,220.00	13,416.00
005	Municipal Court	51,525.00	0.00	34,638.96	6,220.00	28,418.96



Sort Level	Description	Budget	Beg Bal	Debits	Credits	End Bal
006	Parks					
05	Personal Services	34,550.00	0.00	42,989.62	14,000.00	28,989.62
06	Materials & Services	39,650.00	0.00	36,300.60	245.00	36,055.60
07	Capital Outlay	0.00	0.00	0.00	0.00	0.00
006	Parks	74,200.00	0.00	79,290.22	14,245.00	65,045.22
007	Pool					
05	Personal Services	56,060.00	0.00	55,352.34	0.00	55,352.34
06	Materials & Services	30,350.00	0.00	23,838.39	301.05	23,537.34
07	Capital Outlay	0.00	0.00	0.00	0.00	0.00
007	Pool	86,410.00	0.00	79,190.73	301.05	78,889.68
Expense	Expense	2,003,447.00	0.00	1,445,043.38	34,016.84	1,411,026.54
<b>001</b>	<b>General</b>	<b>0.00</b>	<b>0.00</b>	<b>1,500,597.17</b>	<b>1,409,511.89</b>	<b>-91,085.28</b>
<b>005</b>	<b>Tourism</b>					
Revenue	Revenue					
R1	Revenue	152,548.00	0.00	0.00	59,228.95	59,228.95
Revenue	Revenue	152,548.00	0.00	0.00	59,228.95	59,228.95
Expense	Expense					
500	Tourism					
06	Materials & Services	152,548.00	0.00	23,546.30	24.37	23,521.93
500	Tourism	152,548.00	0.00	23,546.30	24.37	23,521.93
Expense	Expense	152,548.00	0.00	23,546.30	24.37	23,521.93
<b>005</b>	<b>Tourism</b>	<b>0.00</b>	<b>0.00</b>	<b>23,546.30</b>	<b>59,253.32</b>	<b>35,707.02</b>
<b>011</b>	<b>Street</b>					
Revenue	Revenue					
R1	Revenue	414,963.00	0.00	0.00	227,528.58	227,528.58
Revenue	Revenue	414,963.00	0.00	0.00	227,528.58	227,528.58
Expense	Expense					
110	Streets					
05	Personal Services	40,530.00	0.00	36,454.73	0.00	36,454.73
06	Materials & Services	134,160.00	0.00	85,293.55	17,670.29	67,623.26
07	Capital Outlay	10,000.00	0.00	0.00	0.00	0.00
08	Contingencies	176,473.00	0.00	0.00	0.00	0.00
09	Transfers	53,800.00	0.00	53,800.00	0.00	53,800.00
110	Streets	414,963.00	0.00	175,548.28	17,670.29	157,877.99
Expense	Expense	414,963.00	0.00	175,548.28	17,670.29	157,877.99
<b>011</b>	<b>Street</b>	<b>0.00</b>	<b>0.00</b>	<b>175,548.28</b>	<b>245,198.87</b>	<b>69,650.59</b>

Sort Level	Description	Budget	Beg Bal	Debits	Credits	End Bal
<b>012</b>	<b>Water</b>					
Revenue	Revenue					
R1	Revenue	2,127,106.00	0.00	1,102.38	1,381,019.01	1,379,916.63
Revenue	Revenue	2,127,106.00	0.00	1,102.38	1,381,019.01	1,379,916.63
Expense	Expense					
120	Water					
05	Personal Services	533,325.00	0.00	387,393.92	0.00	387,393.92
06	Materials & Services	396,600.00	0.00	298,115.84	16,226.67	281,889.17
07	Capital Outlay	104,806.00	0.00	41,007.01	0.00	41,007.01
08	Contingencies	230,573.00	0.00	0.00	0.00	0.00
09	Transfers	861,802.00	0.00	706,658.00	0.00	706,658.00
120	Water	2,127,106.00	0.00	1,433,174.77	16,226.67	1,416,948.10
Expense	Expense	2,127,106.00	0.00	1,433,174.77	16,226.67	1,416,948.10
<b>012</b>	<b>Water</b>	<b>0.00</b>	<b>0.00</b>	<b>1,434,277.15</b>	<b>1,397,245.68</b>	<b>-37,031.47</b>
<b>013</b>	<b>Sewer</b>					
Revenue	Revenue					
R1	Revenue	1,432,721.00	0.00	1,330.91	1,045,586.71	1,044,255.80
Revenue	Revenue	1,432,721.00	0.00	1,330.91	1,045,586.71	1,044,255.80
Expense	Expense					
130	Sewer					
05	Personal Services	465,300.00	0.00	370,669.35	0.00	370,669.35
06	Materials & Services	367,300.00	0.00	302,162.91	21,510.76	280,652.15
07	Capital Outlay	14,850.00	0.00	15,200.54	0.00	15,200.54
08	Contingencies	182,943.00	0.00	0.00	0.00	0.00
09	Transfers	402,328.00	0.00	402,328.00	0.00	402,328.00
130	Sewer	1,432,721.00	0.00	1,090,360.80	21,510.76	1,068,850.04
Expense	Expense	1,432,721.00	0.00	1,090,360.80	21,510.76	1,068,850.04
<b>013</b>	<b>Sewer</b>	<b>0.00</b>	<b>0.00</b>	<b>1,091,691.71</b>	<b>1,067,097.47</b>	<b>-24,594.24</b>
<b>017</b>	<b>Capital Improvement</b>					
Revenue	Revenue					
R1	Revenue	26,936,314.00	0.00	0.00	1,239,973.52	1,239,973.52
Revenue	Revenue	26,936,314.00	0.00	0.00	1,239,973.52	1,239,973.52
Expense	Expense					
09	Transfers	0.00	0.00	0.00	0.00	0.00
170	Capital Improvements Expense					
06	Materials & Services	120,482.00	0.00	83,922.00	30,900.00	53,022.00
08	Contingencies	1,837,832.00	0.00	0.00	0.00	0.00
170	Capital Improvements Expense	1,958,314.00	0.00	83,922.00	30,900.00	53,022.00
171	FacilitiesSpecial Projects					

Sort Level	Description	Budget	Beg Bal	Debits	Credits	End Bal
07	Capital Outlay	7,070,000.00	0.00	3,730,368.84	516.71	3,729,852.13
171	FacilitiesSpecial Projects	7,070,000.00	0.00	3,730,368.84	516.71	3,729,852.13
172	Parks Projects					
07	Capital Outlay	30,000.00	0.00	0.00	0.00	0.00
172	Parks Projects	30,000.00	0.00	0.00	0.00	0.00
173	Transportation Projects					
07	Capital Outlay	1,870,000.00	0.00	13,502.47	0.00	13,502.47
173	Transportation Projects	1,870,000.00	0.00	13,502.47	0.00	13,502.47
174	Water Projects					
07	Capital Outlay	3,020,000.00	0.00	73,871.33	1,827.94	72,043.39
174	Water Projects	3,020,000.00	0.00	73,871.33	1,827.94	72,043.39
175	Sewer Projects					
07	Capital Outlay	12,888,000.00	0.00	1,033,533.48	74,897.78	958,635.70
175	Sewer Projects	12,888,000.00	0.00	1,033,533.48	74,897.78	958,635.70
176	Storm Water Projects					
07	Capital Outlay	100,000.00	0.00	0.00	0.00	0.00
176	Storm Water Projects	100,000.00	0.00	0.00	0.00	0.00
Expense	Expense	26,936,314.00	0.00	4,935,198.12	108,142.43	4,827,055.69
<b>017</b>	<b>Capital Improvement</b>	<b>0.00</b>	<b>0.00</b>	<b>4,935,198.12</b>	<b>1,348,115.95</b>	<b>-3,587,082.17</b>
<b>020</b>	<b>SDC's</b>					
Revenue	Revenue					
R1	Revenue	3,545,441.00	0.00	0.00	208,714.85	208,714.85
Revenue	Revenue	3,545,441.00	0.00	0.00	208,714.85	208,714.85
Expense	Expense					
200	SDC Fund					
06	Materials & Services	240,000.00	0.00	1,906.81	0.00	1,906.81
07	Capital Outlay	2,380,441.00	0.00	147,118.52	0.00	147,118.52
08	Contingencies	775,000.00	0.00	0.00	0.00	0.00
09	Transfers	150,000.00	0.00	350,000.00	225,000.00	125,000.00
200	SDC Fund	3,545,441.00	0.00	499,025.33	225,000.00	274,025.33
Expense	Expense	3,545,441.00	0.00	499,025.33	225,000.00	274,025.33
<b>020</b>	<b>SDC's</b>	<b>0.00</b>	<b>0.00</b>	<b>499,025.33</b>	<b>433,714.85</b>	<b>-65,310.48</b>
<b>024</b>	<b>Debt Service Pool Project</b>					
Revenue	Revenue					
R1	Revenue	71,315.00	0.00	0.00	65,560.12	65,560.12
Revenue	Revenue	71,315.00	0.00	0.00	65,560.12	65,560.12

Sort Level	Description	Budget	Beg Bal	Debits	Credits	End Bal
Expense 240	Expense Capital Project Pool Bond					
08	Contingencies	3,228.00	0.00	0.00	0.00	0.00
11	Debt Service	68,087.00	0.00	14,043.25	0.00	14,043.25
240	Capital Project Pool Bond	71,315.00	0.00	14,043.25	0.00	14,043.25
Expense	Expense	71,315.00	0.00	14,043.25	0.00	14,043.25
<b>024</b>	<b>Debt Service Pool Project</b>	<b>0.00</b>	<b>0.00</b>	<b>14,043.25</b>	<b>65,560.12</b>	<b>51,516.87</b>
<b>026</b>	<b>Debt Service</b>					
Revenue	Revenue					
R1	Revenue	1,235,799.00	0.00	0.00	886,801.00	886,801.00
Revenue	Revenue	1,235,799.00	0.00	0.00	886,801.00	886,801.00
Expense	Expense					
260	Dept					
08	Contingencies	163,854.00	0.00	0.00	0.00	0.00
11	Debt Service	1,071,945.00	0.00	1,000,084.57	0.00	1,000,084.57
260	Dept	1,235,799.00	0.00	1,000,084.57	0.00	1,000,084.57
Expense	Expense	1,235,799.00	0.00	1,000,084.57	0.00	1,000,084.57
<b>026</b>	<b>Debt Service</b>	<b>0.00</b>	<b>0.00</b>	<b>1,000,084.57</b>	<b>886,801.00</b>	<b>-113,283.57</b>
<b>027</b>	<b>VERF</b>					
Revenue	Revenue					
R1	Revenue	122,256.00	0.00	0.00	74,000.00	74,000.00
Revenue	Revenue	122,256.00	0.00	0.00	74,000.00	74,000.00
Expense	Expense					
127	Reserves					
07	Capital Outlay	122,256.00	0.00	115,611.52	0.00	115,611.52
08	Contingencies	0.00	0.00	0.00	0.00	0.00
127	Reserves	122,256.00	0.00	115,611.52	0.00	115,611.52
Expense	Expense	122,256.00	0.00	115,611.52	0.00	115,611.52
<b>027</b>	<b>VERF</b>	<b>0.00</b>	<b>0.00</b>	<b>115,611.52</b>	<b>74,000.00</b>	<b>-41,611.52</b>
<b>070</b>	<b>Urban Renewal</b>					
Revenue	Revenue					
R1	Revenue	767,977.00	0.00	0.00	283,690.41	283,690.41
Revenue	Revenue	767,977.00	0.00	0.00	283,690.41	283,690.41
Expense	Expense					
700	Urban Renewal					
06	Materials & Services	6,500.00	0.00	5,468.24	0.00	5,468.24

<b>Sort Level</b>	<b>Description</b>	<b>Budget</b>	<b>Beg Bal</b>	<b>Debits</b>	<b>Credits</b>	<b>End Bal</b>
07	Capital Outlay	536,477.00	0.00	9,727.56	0.00	9,727.56
08	Contingencies	160,000.00	0.00	0.00	0.00	0.00
11	Debt Service	65,000.00	0.00	65,000.00	0.00	65,000.00
700	Urban Renewal	767,977.00	0.00	80,195.80	0.00	80,195.80
Expense	Expense	767,977.00	0.00	80,195.80	0.00	80,195.80
<b>070</b>	<b>Urban Renewal</b>	<b>0.00</b>	<b>0.00</b>	<b>80,195.80</b>	<b>283,690.41</b>	<b>203,494.61</b>
<b>Grand Total</b>		<b>0.00</b>	<b>0.00</b>	<b>10,869,819.20</b>	<b>7,270,189.56</b>	<b>-3,599,629.64</b>



**To:** The Mayor and Members of the City Council  
**From:** Aimee Amerson, City Recorder  
**Subject:** Annual Carlton Clean Up day  
**Council Goal:** Goal 3: Citizen Involvement  
**Date:** April 2, 2024

### Background

The City of Carlton holds an annual Clean Up Day for City of Carlton residents. This event gives residents, who reside within the city limits, an opportunity to bring their scrap metal, yard debris, garbage, and outdated electronics, to dispose of in large dumpsters at the Wennerberg parking area for free. This year's event will be held on April 20<sup>th</sup>, 2024, starting at 9 AM, and lasting until the dumpsters are full or Noon, whichever happens first.

Each year this event is held, the attendance has been steadily growing. Cars, trucks with trailers, and even buses line up Grant Street, waiting for their turn to dispose of their refuse and clean up their properties.



Because of this line up of vehicles, and the traffic congestion it brings, those who want to use the park for recreational purposes, are driving and walking around dozens of cars, people, and equipment, to use the same park space. To keep everyone and their dog safe, we will be closing the park to all uses and vehicles not participating in the Clean-up event. As soon as the event is over, the park will be re-opened to all park users. We estimate that the park will be closed until Noon on April 20<sup>th</sup>.



## Memorandum

**To:** The Mayor and Members of the City Council  
**From:** Chief Martinez  
**Subject:** Promotion of Senior Officer Blair to Sergeant  
**Council Goal:** Goal 4: Good Governance  
**Date:** April 2, 2024

## Recommendation

This agenda item is for notification purposes only.

## Background

I am pleased to announce the promotion of Senior Officer Jake Blair to the rank of Sergeant starting March 16, 2024.

Over the last 10 years Jake has exhibited a strong sense of responsibility, sound decision-making skills, and a proven ability to motivate and inspire other department members. He has consistently demonstrated exceptional leadership qualities, dedication, and a strong commitment to upholding the values and mission of the Carlton Police Department. Jake has acted in the role of lead investigator/detective on a number of significant cases that led to successful dispositions. He shares and promotes the department's and City Council's community policing philosophies. He has also played a critical part in aiding the department in enhancing its professionalism and standards by facilitating our agency re-accreditation.

The new Council room will allow room for family, friends, and others to participate in a public recognition of this promotion. I will work with the Mayor and Council for a public recognition of Sergeant Blair's promotion at the August 2024 meeting.

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**To:** The Mayor and Members of the City Council  
**From:** Ashlee Boyd  
**Subject:** Update on the 2024 Pool Season  
**Council Goal:** Goal 4: Good Governance  
**Date:** April 2, 2024

## Recommendation

This agenda item is for informational purposes only.

## Background

The 2024 Carlton Pool Season is already under way! We have been busy recruiting lifeguards (both new and returning) in hopes of having a well-rounded team so that we are able to offer more classes and lessons this year. We are hoping to open the season 7 days per week with swim lessons and public swim and then gradually add some adult water aerobics classes and teen swims to the schedule – staffing and schedules permitting.

Training, pool house cleaning, and inventory for the lifeguards will tentatively start on Friday June 14<sup>th</sup> and be ready for opening day on Monday, June 17<sup>th</sup>. This should give our lifeguards some time to work out any hiccups in operation and get settled into a routine so that they are ready for Carlton Fun Days on June 22<sup>nd</sup>. At this point, we have applications turned in for 5 returning guards as well as 2 new, experienced guards. We have not yet officially filled the Lifeguard Manager position, but we are hopeful that one of the older, experienced guards will be able to step up to that role. Once we have completed interviews and intake for the new guards, we will have a better understanding of the hours of operation that we will be able to facilitate.

In order to hire minors, we have also filled out and returned the renewal paperwork to BOLI and should be receiving the renewal certificate by the end of the month. We have also obtained the current year's Seasonal Pool Certification from Yamhill County Environmental Health. Public Works is aware that the Boiler Pressure Vessel Operating Permits will expire on 7/31/2024, and they will have it scheduled for inspection before that date.

Public Works has also started their annual pool maintenance a little earlier this year! The crew has been in to repair and clean the bathrooms, resurface the floor in the women's locker room, and will be pressure washing the locker rooms, specifically the harder-to-reach items such as the ventilation windows and ceiling fans that the lifeguards would not be able to access when they come in for cleaning. They will also be taking care of the outside maintenance as the weather gets warmer.





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**NOTICE OF PUBLIC HEARINGS  
CITY OF CARLTON COMPREHENSIVE PLAN AMENDMENT  
CITY CASE FILE LA 2024-01**

NOTICE IS HEREBY GIVEN that the City of Carlton will hold public hearings to consider adoption of proposed legislative amendments to the City of Carlton Comprehensive Plan. Proposed legislative amendments, city case file LA 2024-01, add, modify, delete, and retain the goals, policies and objectives identified to the existing Carlton Comprehensive Plan of 2000, as amended through June 2009. Proposed legislative amendments encompass all existing chapters of the Comprehensive Plan of 2000 and statewide planning goals where applicable, these include: Citizen Involvement (Goal 1); Land Use Planning (Goal 2); Natural Resources (Goal 5); Air, Water & Land Resource Quality (Goal 6); Natural Hazards (Goal 7); Recreational Needs (Goal 8); Economic Development (Goal 9); Housing (10); Public Facilities & Services (Goal 11); Transportation (12); Energy Conservation (13) and Urbanization (14). An appendix document titled “Comprehensive Plan Appendix: Inventories” is also subject to hearing consideration.

The Carlton Planning Commission conducts the first public hearing and will forward a recommendation of action to the City Council.

PLANNING COMMISSION PUBLIC HEARING: **Monday, March 11, 2024**  
 TIME: **6:00 p.m.**  
 PLACE: **945 West Grant Street, Carlton**  
 (location of temporary city offices)

If the Planning Commission makes a recommendation on the above date, the Carlton City Council conducts the second public hearing to consider adoption of proposed amendments.

CITY COUNCIL PUBLIC HEARING: **Tuesday, April 2, 2024**  
 TIME: **7:00 p.m.**  
 PLACE: **945 West Grant Street, Carlton**  
 (location of temporary city offices)

The complete draft Comprehensive Plan document with appendix subject to public hearings, along with a matrix to help explain which goals, policies and objectives are to be added, modified, deleted and retained, is available for inspection at the temporary offices of City Hall, addressed at 945 West Grant Street, or may be purchased at a reasonable cost. An electronic version of the draft Comprehensive Plan and materials subject to hearing are also posted on the City of Carlton website at:

[www.ci.carlton.or.us/planning/page/comprehensive-plan](http://www.ci.carlton.or.us/planning/page/comprehensive-plan)

Persons wishing to participate in the public hearings may appear in person or by representative at the dates and times listed above, or virtually (meeting agendas will include a Zoom link for this purpose). Written comments may also be submitted via mail to City of Carlton, Planning Division, 945 West Grant Street, Carlton, OR 97111, but must be received prior to hearing dates. One week prior to both hearing dates, a copy of the staff report pertaining to the above, will be available for inspection. Legislative amendment procedure (a Type IV action) is described in Section 17.212.020 of the Carlton Development Code and subject to procedures identified in OAR 660-018-002. Failure of an issue to be raised at the hearing, in person or in writing, or failure to provide sufficient specificity to afford the City Council an opportunity to respond to the issue precludes appeal to the Land Use Board of Appeals. For more information, please contact Aimee Amerson, City Recorder, [aamerson@ci.carlton.or.us](mailto:aamerson@ci.carlton.or.us) / 503-852-3808 or Scott Whyte, Contract City Planner, [swhyte@mwvcog.org](mailto:swhyte@mwvcog.org) / (503) 540-1623.

**CITY OF CARLTON  
 CITY COUNCIL  
 STAFF REPORT**

**SUBJECT:** Legislative Public Hearing for Comprehensive Plan Amendment

**REPORT / HEARING DATE:** March 26, 2024 / April 2, 2024

**CITY FILE NUMBER:** LA 2024-01

**CRITERIA:** Carlton Development Code (CDC) Sections:  
 • Public notice and hearing procedures: 17.192 - 196  
 Oregon Revised Statutes:  
 • Procedures: ORS 197.610 through 197.651

**APPLICANT:** City of Carlton

**EXHIBITS:** Documents subject to ordinance adoption consideration  
 Exhibit 1 - City of Carlton Comprehensive Plan, March 2024  
 Exhibit 2 - Comprehensive Plan Appendix: Inventories, March 2024  
Documents to aid understanding of proposed amendments  
 Exhibit 3 – Comprehensive Plan Table Matrix  
  
Documents received by others  
 Exhibit 4 – DLCD letter dated 3-7-24 – comments in response to proposed Comprehensive Plan Amendment  
 Exhibit 5 – Recommended Goal 6 Factual Background Information – by DLCD (also received 3-7-24)  
 Exhibit 6 - ODOT email dated 3-11-24- comments in response to proposed Comprehensive Plan Amendment  
Draft Ordinance  
 Exhibit 7 If Council votes in support of proposed amendments

**I. SUMMARY**

This proposal would add, modify, delete, and retain the goals, policies and objectives identified to the existing Carlton Comprehensive Plan of 2000, as amended through June 2009. Proposed legislative amendments encompass all existing chapters of the Carlton Comprehensive Plan, titles of which correlate with the titles of applicable statewide planning goals. Subject to hearing consideration is the draft Carlton Comprehensive Plan of March 2024 (Exhibit 1). Also subject to hearing consideration is an appendix document titled Comprehensive Plan Appendix: Inventories, dated March 2024 (Exhibit 2).

Both exhibits have been updated since the Planning Commission hearing date of March 11, 2024, to reflect requested changes identified by the Planning Commission and changes identified by public agencies. Changes to updated Exhibits 1 and 2 are shown either underlined (indicating proposed addition) or ~~struck through~~ (indicating deletion).

## II. BACKGROUND INFORMATION

Staff refer to the Introduction page of Exhibit 1. In part, the Introduction explains how the City of Carlton began work on the Comprehensive Plan update in December 2021. The Introduction page of Exhibit 1 explains how the update is based on a robust community engagement process led by the Project Advisory Committee (PAC). The PAC met five times to help craft the vision statement, goals, policies, and objectives, and to facilitate conversations with the community. The Introduction page explains how policy language is based on input from hundreds of Carlton stakeholders that participated in the process through a series of community conversations, interviews, neighborhood meetings, online questionnaires, and community-wide summits.

The Council public hearing on April 2, 2024, is the second of two hearings required by the Carlton Development Code as described in Sections 17.212 and 17.192.030 (the Type IV Legislative Procedure) and procedures required by state law. The first hearing was held before the Carlton Planning Commission on March 11, 2024. After receiving public testimony, the Planning Commission deliberated and voted unanimously in favor of a motion recommending that the City Council approve the proposed Comprehensive Plan Amendment and Appendix inclusive of additions and edits made by all Commissioners during the hearing. Commission action also supports the staff recommendation of including changes identified by the Oregon Department of Land Conservation and Development (DLCDC) and the Oregon Department of Transportation (ODOT) to the record. In summary, these agency changes include:

- DLCDC policy additions/Edits to Goal 5 (Natural Resources, Scenic & Historic Areas...);
- DLCDC policy and inventory additions/edits to Goal 6 (Air, Water & Land Resource Quality);
- DLCDC policy and inventory additions/edits to Goal 7 \* (Natural Disasters & Hazards); and
- ODOT policy additions/edits and background text to Goal 12 (Transportation).

\* Staff recommended not to include requirements due by January 2026, as identified.

Specific changes shown to Exhibit 1 and 2 (introduced since the hearing of March 11) have not returned to the Commission for verification. Prior to motion, staff asked if the Commission would like to continue the hearing to review all changes to Exhibit 1 and 2 as verbally conveyed and as received via public agencies. The Commission decided not to continue the hearing for this purpose. Accordingly, action by the Commission (March 11) entrusts staff to make appropriate changes to Exhibits 1 and 2, inclusive of additions and edits via public agencies and as made by Commissioners during the hearing without returning to the Commission.

Staff addition of other city-adopted studies to the Appendix (beyond DLCDC listed items): Changes shown to Exhibit 2 (since the Commission hearing of March 11) include other city adopted studies, not identified as part of the Appendix and beyond the studies recommended by DLCDC for inclusion thereto via Exhibits 4 and 5. These added city-adopted studies include:

- 2019 Parks Development Plan, and
- 2014 Water Master Plan, and
- 2022 Storm Drainage System Plan, and
- 2022 – Mercury TMDL Plan for the City of Carlton.

Generally, staff observe Exhibit 2 to include a compilation of past inventoried information pertaining to soils, natural resources, historic and cultural resources. The bulleted studies (above) have been approved by Council and staff recommends these for addition to Exhibit 2. While these studies were not included as part of the Appendix subject to Planning Commission consideration on

March 11, staff finds the bulleted addition (above) to be inconsequential to the Planning Commission recommendation.

After the March 11 hearing, staff added other minor changes to Exhibit 2. To clarify, below is a list of minor changes to Exhibit 2 that were / were not considered by the Commission.

Not considered by the Commission on March 11, 2024

- Citizen Involvement. Added original background information with some edits to remove outdated information.
- Natural Resources. Added sentence from DEQ stating that “The North Yamhill River, Yamhill River, and Hawn Creek downstream from Hawn Creek Reservoir are Essential Salmonid Habitat.”
- Recreation. Updated with information from the Parks Master Plan.
- Economy. Added original background information with some edits to streamline and remove outdated information.
- Housing. Added original background information with some edits to streamline and remove outdated information.
- Public Facilities:
  - Updated with information from 2014 Water Master Plan.
  - Updated with information from 2022 Storm Drainage Master Plan.
- Transportation. Added original background information with some edits to streamline and remove outdated information. Also added maps where missing from current Comprehensive Plan.
- Energy. Added original background information with some edits to streamline and remove outdated information.
- Urbanization. Added sentence to acknowledge policy direction to phase out Agricultural Holding zone.

Were considered by the Commission on March 11, 2024

- Water Resources. Added information provided by DLCD and additional guidance from DEQ.
- Natural Hazards. Updated with information from the Yamhill Natural Hazards Mitigation Plan per guidance from DLCD.

While several items (above) have not been considered by the Planning Commission, these items are minor and do not appear (to staff) to be substantial or consequential to change the Planning Commission recommendation. The Council has option of continuing the hearing on April 2, directing remand of the above (i.e., goes back to the Commission for further consideration) if desired.

### **III. PROCEDURE**

All Comprehensive Plan Amendments are subject to “Post-Acknowledgement Procedures” described in ORS 197.610 through 197.651. Content of public notice for hearing purposes, timing and due process for appeals are described therein. In review of ORS 197.610 through 197.651, the following key procedural items have been completed as follows:

- On February 2, 2024, the Oregon Department of Land Conservation and Development (DLCD) received required notification of the proposed Comprehensive Plan amendment commensurate with the timing required (35-days) prior to the first public hearing at which public testimony or new evidence is to be received. Both hearings-ready documents (Exhibits 1 and 2) and a matrix of proposed changes (Exhibit 3) were uploaded to the DLCD website on this day.
- On February 16, 2024, the city mailed required written notice to all affected government agencies, including Yamhill County and the Oregon Department of Transportation, and to persons who requested notice from the city concerning this proposal. Mailed notice identifies the first and second hearings before the Planning Commission and City Council, respectively.
- On February 28 and March 1, 2024, pursuant to Section 17.192.030, the News Register newspaper company published required notice of said public hearings.

The draft Comprehensive Plan document (Exhibit 1) and Appendix for inventories (Exhibit 2) are now subject to the second of two required public hearings. If the Council approves, the next step is to adopt an ordinance. Thereafter, staff issues notice of the decision to all parties of record. DLCD and ODOT, having provided respective written statements ahead of the hearing, are given the ordinance and copies of Exhibits 1 and 2.

#### IV. CRITERIA & FINDINGS

Oregon Revised Statutes (ORS) 197.175(2) requires cities and counties to prepare, adopt, amend and revise comprehensive plans in compliance with the statewide planning goals. The Carlton Comprehensive Plan and Development Code contain no other criteria for amendment. Accordingly, findings herein identify and respond to applicable statewide planning goals.

There are a total of nineteen statewide planning goals identified in Oregon Administrative Rules (OAR) under Chapter 660, Division 18. Of these goals, twelve are applicable to Carlton, which include: *Citizen Involvement* (Goal 1), *Land Use Planning* (Goal 2), *Natural Resources* (Goal 5), *Air, Water & Land Resource Quality* (Goal 6), *Natural Hazards* (Goal 7), *Recreational Needs* (Goal 8), *Economic Development* (Goal 9), *Housing* (10), *Public Facilities & Services* (Goal 11), *Transportation* (12), *Energy Conservation* (13) and *Urbanization* (14).

**Facts and Findings:** The following facts and findings demonstrate how the draft Comprehensive Plan document (Exhibit 1) complies with each of the above-listed goals. In consideration of each goal, staff underscores how the draft Comprehensive Plan proposal is limited in scope (i.e., specific to the removal, modification and addition of goals, policies and objectives identified to the existing Carlton Comprehensive Plan of 2000, as amended through June 2009). Exhibit 1 does not add or remove past studies or inventories recognized by statute or rule. Exhibit 1 also does not encompass a Comprehensive Plan Map, Zoning Map or Urban Growth Boundary (UGB) amendment. Staff clarifies such in the response to each applicable Goal as described below.

**Goal 1: Citizen Involvement.** Goal 1 is addressed primarily through input received from persons serving on the PAC. The Introduction page of Exhibit 1 explains how policy language is based on input from hundreds of Carlton stakeholders that participated in the process through a series of community conversations, interviews, neighborhood meetings, online

questionnaires, and community-wide summits. Public hearings required by statute for adoption of a Comprehensive Plan provide another opportunity for citizen involvement.

Goal 1 speaks of continued public involvement for future land use applications. Staff notes that policies and objectives listed under Goal 1 have been updated since the Planning Commission hearing date of March 11, 2024, with changes shown either underlined (proposed addition) or ~~struck through~~ (proposed deletion). The changes shown to Goal 1 reflect requested changes and general direction identified by the Planning Commission on March 11, 2024.

**Goal 2:** *Land Use Planning.* All local governments are required to have a Comprehensive Plan and Goal 2 describes the framework and essential elements. In part, Goal 2 refers to the Comprehensive Plan as defined by ORS 197.015(5). The City of Carlton has a Comprehensive Plan acknowledged by the Land Conservation and Development Commission (LCDC), dating back to year 1979. Subsequently, Carlton received post-acknowledged plan approval (PAPA) for various plan amendments.

For Goal 2, Exhibit 1 identifies existing land use map designations of the Comprehensive Plan and corresponding zones intended to implement these designations. No existing land use plan map designation or zone is proposed for removal. No land use map additions or modifications are proposed. Exhibit 1 also acknowledges the existing Floodplain Management overlay zone and the existing Urban Growth Boundary. Exhibit 1 includes one procedural policy that falls under Goal 2, specific to updating the Comprehensive Plan via future amendments. Exhibit 1 also includes a policy specific to implementation policies identified by the Comprehensive Plan (via the Development Code and other ordinances). Exhibit 1 includes a policy that mentions initiation of a process to phase-out the existing Agricultural Holding (AH) designation / zone. This policy will be subject to future consideration when the city conducts Housing Needs Analysis (see Goal 10). Through HNA, if the city discovers a deficit in future housing supply (via new 20-year forecast) the phase-out of AH planned / zoned property could be one strategy to increase future housing supply.

**Goal 5:** *Natural Resources, Scenic and Historic Areas, and Open Spaces.* Exhibit 1 identifies several goals and policies that speak to conserving open space, protecting natural and scenic resources, and preserving historic and cultural resources. Exhibit 1 does not introduce new historic or cultural resources. In part, Exhibit 1 conveys known historical information about certain structures and properties. For example, under Goal 5, the Carlton State Bank and Savings building is mentioned, being located on the northwest corner of Main Street and Pine Street and listed on the National Register of Historic Places. Also acknowledged is the property known as Westerlook Farm (the Charles Ladd Estate) built in 1912, listed on the Statewide Inventory of Historic Sites and Buildings. Additional existing historic resource information is shown to Exhibit 2.

For natural resources, Goal 5 identifies several resources subject to inventory. These include (and are not limited to) riparian corridors, wetlands and wildlife habitat. As previously stated, Exhibit 1 does not introduce new studies or inventories recognized by statute or rule. Exhibit 1 also does not add to or modify existing inventoried resources. Exhibit 2 is a compilation of existing inventories carried forward. OAR 660-023-0030 identifies procedures requirements for creating and amending inventories under Goal 5. Staff acknowledge how several steps are

required by law when introducing or modifying inventories. This includes providing early notice to state and federal resource management agencies.

Exhibit 1 identifies policies and objectives under Goal 5 that the Carlton Development Code is expected to encompass in further detail. For example, Policy 2 and the objective thereto calls for maintaining and expanding the city's open-space network, especially greenways and open space along creeks. One objective in support of this policy seeks to ensure adequate open space and trail development in high density development and neighborhoods lacking access to these amenities. A recent amendment of the Development Code (underway in case file LA 2024-02) implements the objective (in part) with proposed changes to Section 17.84.050 (Landscape Plans) requiring 50% of plant materials to be native species. Other proposed Development Code changes include new minimum open space and standards for tree size, planting and spacing.

Policies and objectives listed under Goal 5 have been updated since the Planning Commission hearing date of March 11, 2024, with changes shown either underlined (proposed addition) or ~~struck through~~ (proposed deletion). The changes shown to Goal 5 reflect requested changes and general direction identified by the Planning Commission on March 11, 2024, and changes identified by DLCDC via correspondence.

**Goal 6: Air, Water & Land Resource Quality.** Exhibit 1 identifies goals, policies and objectives aimed at maintaining and improving the quality of the air, water, and land resources of the city. Exhibit 1 also refers to existing data sources pertaining to air, water and resource quality compiled by known government agencies (e.g., United States Environmental Protection Agency) and does not introduce a new study. In part, Exhibit 1 identifies certain objectives that future amendments to the Carlton Development Code or Public Facilities Master Plans are expected capture in further detail. For example, in response to Objective 1B (*Prioritize on-site stormwater management except where the city determines it to be inefficient or infeasible.*) future updates to the Carlton Development Code and the Carlton facilities plan for stormwater would identify the circumstances and thresholds for requiring stormwater management as part of development proposals. The current Development Code amendment (LA 2024-02) introduces new grading and storm water management standards.

Policies and objectives listed under Goal 6 have been updated since the Planning Commission hearing date of March 11, 2024, with changes shown either underlined (proposed addition) or ~~struck through~~ (proposed deletion). The changes shown to Goal 6 reflect requested changes and general direction identified by the Planning Commission on March 11, 2024, and changes identified by DLCDC via correspondence.

**Goal 7: Natural Hazards.** Goal 7, titled *Areas Subject to Natural Disasters and Hazards* to Exhibit 1 identifies the need for protecting people and property from natural hazards. Specifically mentioned are earthquakes, wildfire, severe weather and drought and flood. Proposed policies and objectives in Exhibit 1 speak to promoting awareness of these hazards and for developing a disaster preparedness plan. For data source, Exhibit 1 refers to the *2006 Yamhill County Natural Hazards Mitigation Plan* and the *2020 City of Carlton Addendum*. Again, no new studies are introduced under Goal 7.

Exhibit 1 identifies certain policies and objectives under Goal 7 that the Carlton Development Code will capture in further detail, upon amendment. For example, Policy 1 of Goal 7 and



objectives thereof speak generally to limiting development with the floodplain. Staff observe Section 17.56 of the Carlton Development Code (titled Floodplain Management) to contain standards that regulate development in the 100-year floodplain and the current map / source data where found. It should be noted that floodplain standards in Section 17.56 (and other code sections) are subject to the current amendment proposal (case file LA 2024-02) via separate hearing process. Proposed code updates are intended to ensure consistency with current FEMA floodplain management standards.

Policies and objectives listed under Goal 7 have been updated since the Planning Commission hearing date of March 11, 2024, with changes shown either underlined (proposed addition) or ~~struck-through~~ (proposed deletion). The changes shown to Goal 7 reflect requested changes and general direction identified by the Planning Commission on March 11, 2024, and changes identified by DLCDC via correspondence.

**Goal 8:** *Recreational Needs.* Exhibit 1 identifies several policies and objectives that respond to the overall goal of satisfying the recreational needs of Carlton’s community and visitors alike. In part, Exhibit 1 incorporates data from the 2019 Carlton Parks Development Plan. A table shown to Goal 8 identifies the location of existing parks inside city limits. Staff acknowledge how Policy 3 calls for coordination with adjacent jurisdictions to plan for and create parkland and recreational facilities. In part, 2019 Carlton Parks Development Plan identifies a future a multi-use path to be located along the former Southern Pacific Railroad right-of-way (inside city limits). As most of this right-of-way is under jurisdiction of Yamhill County, creation of this recreational facility will necessitate coordination with Yamhill County and the Oregon Department of Transportation. The 2019 Carlton Parks Development Plan and data therein is not subject update / change through this amendment.

One objective under Goal 8 has been updated since the Planning Commission hearing date of March 11, 2024, reflective of comments received, with changes shown either underlined (proposed addition) or ~~struck-through~~ (proposed deletion). One photograph has also been changed hereto.

**Goal 9:** *Economic Development.* The fundamental purpose of Goal 9 is to make sure that a local government plans for economic development. Exhibit 1 does not include Economic Opportunities Analysis (EOA) recognized by statute and rule (OAR 660-009-0015). Proposed new and modified policies and objectives of Exhibit 1 speak to providing an adequate supply of commercial and industrial land to accommodate economic growth and development. Exhibit 1 also includes recent industry trend information and employment data but is not inclusive of a new EOA or intended update. As previously mentioned, Exhibit 1 does not include a map amendment. Lands planned for Commercial and Industrial remain the same, thereby causing no change (or potential deficit) in land available for future employment growth. Policies and objectives shown to Exhibit 1 would be reexamined and potentially amended with future EOA.

**Goal 10:** *Housing.* In part, Exhibit 1 includes data from the last full Housing Needs Analysis (HNA) conducted by the City of Carlton in 2007. Exhibit 1 also includes recent housing trend information and population data but is not inclusive of a new HNA, recently renamed Housing Capacity Analysis (as described in OAR 660 Division 8 and other rules). As previously mentioned, the proposed Plan amendment does not include a map amendment. Lands planned for residential remain the same, thereby causing no change (or potential deficit) to

land available for future housing production identified by the 2007 HNA. Existing housing stock remains unchanged. Soon, the City of Carlton intends to seek funding (where / when available) for producing a new HNA / HCA. Policies and objectives shown to Exhibit 1 would be reexamined and potentially amended with future HNA/HCA. After completing the new HNA / HCA, the city will execute strategies identified thereto, possibly initiating map amendments if a housing deficit is discovered. As mentioned above, the AH zone is slated to be phased-out in time (TBD). City-initiated plan and zone map amendments of existing AH zoned property (from Agricultural Holding to Residential) is one potential strategy for increasing housing supply.

**Goal 11: Public Facilities & Services.** Goal 11 requires local governments to prepare Public Facilities Plans to plan and identify necessary infrastructure to serve future development. Carlton is to plan specifically for urban services (i.e., sanitary sewer, pipe water and storm drainage) for properties inside the UGB. Exhibit 1 does not introduce a new public facilities plan. New and modified policies and objectives shown to Exhibit 1 under Goal 11 speak to modernizing and maintaining municipal facilities in the most efficient and cost-effective manner to adequately serve the existing population and anticipated growth. Exhibit 1 also acknowledges existing facility master plans and a list of other public services (provided by the city or other agencies / service districts). Exhibit 1 does not include a plan or map indicating changes to existing service boundaries.

**Goal 12: Transportation.** Exhibit 1 identifies several goals and policies that speak to providing a safe, convenient, and economic transportation system. Exhibit 1 does not amend the existing Transportation System Plan. In part, Exhibit 1 includes data from the 2009 Transportation System Plan (TSP). Exhibit 1 also includes recent trend information pertaining to transportation but is absent data and analysis specific to current street conditions, system capacity and planned improvements. In 2024, the City of Carlton anticipates initiating proceedings for a TSP update (subject to separate land use hearings). Goals and policies under Goal 12 will help facilitate future amendment of the current 2009 TSP). Policies and objectives shown to Exhibit 1 would be reexamined and potentially amended with future TSP.

Policies and objectives listed under Goal 12 have been updated since the Planning Commission hearing date of March 11, 2024, with changes shown either underlined (proposed addition) or ~~struck through~~ (proposed deletion). The changes shown to Goal 12 reflect requested changes identified by ODOT via correspondence.

In response to a rule described in OAR 660-012-0060, staff finds the proposed amendment to impose no significant impact on existing transportation facilities throughout the city. As explained above, Exhibit 1 does not encompass a Comprehensive Plan Map, Zoning Map or UGB amendment.

**Goal 13: Energy Conservation:** Exhibit 1 identifies goals, policies and objectives aimed at conserving existing energy resources and for developing alternative sources. Once again, Exhibit 1 does not introduce a new study or inventory related to this goal. Exhibit 1 identifies certain objectives that can be implemented via future amendments to the Carlton Development Code. For example, clear and objective standards for drought-tolerant plants (as part of landscape plans for development review) can be introduced to the Development Code. Pending Development Code amendment LA 2024-02 introduces these and other development standards.

**Goal 14: Urbanization.** Goal 14 explains how local urban jurisdictions are required to provide for an orderly and efficient transition from rural to urban land use, to accommodate urban population and urban employment inside urban growth boundaries (UGBs) and to provide for livable communities. Goal 14 also describes the purpose and function of UGBs. Exhibit 1 incorporates recent trend information pertaining to housing and employment. However, as mentioned in this report no study / analysis is introduced. This would include Housing Needs Analysis and Economic Opportunities Analysis, essential data for determining if UGB expansion is warranted.

As the draft Comprehensive Plan explains, seven other statewide goals were not considered applicable. These goals include Goal 3, *Agriculture Lands*, Goal 4 *Forest Lands*, Goal 15 *Willamette River Greenway*, Goal 16 *Estuarine Resources*, Goal 17 *Coastal Shorelands*, Goal 18 *Beaches and Dunes*, and Goal 19 *Ocean Resources*. Staff acknowledge how the planning area of Carlton is primarily urban, all incorporated and not located in proximity to the Willamette River, estuaries, shorelands, beaches or the ocean.

**Conclusion:** Based on the facts and findings above, the proposed Legislative Amendment complies with applicable statewide planning goals.

## **VI. WRITTEN TESTIMONY**

Staff refer to Exhibits shown to the first page of this report. Required public hearing notices provide instructions for submitting written testimony. To date, the city has received only written testimony from the two public agencies as mentioned.

## **VII. RECOMMENDATION**

Staff recommends the Council conduct a public hearing and vote in response to a motion that approves the draft Comprehensive Plan (Exhibit 1) accompanied by the Appendix: Inventories document (Exhibit 2).

Any specific word changes (to policies, objectives or otherwise) beyond those shown to Exhibits 1 and 2, should be made clear for the record. With Council concurrence on any change, staff will incorporate and return with finalized exhibits ready for adoption an Ordinance. A draft Ordinance has been prepared by the City Attorney at this time (Exhibit 7).

# Exhibit 1

# CITY OF CARLTON COMPREHENSIVE PLAN

MARCH 2024



## ACKNOWLEDGEMENTS

### CITY COUNCIL

Linda Watkins, Mayor

Kevin Skipper, Council President

Shirley Ward-Mullen, ~~Council President~~

David Hill

Grant Erickson

Carolyn Thompson-Rizer

Guilherme Brandão

### PROJECT ADVISORY COMMITTEE

Jim Bandy

Robin Geck

Leah Johnston

Annette Madrid

Sabra Mathot

John Schmidt

Anthony Stuart

Susan Turrell

Shirley Ward-Mullen

Carrie Wiebe

Megan Wirtjes

Ken Wright

### CONSULTANT

3J Consulting

JET Planning

### PLANNING COMMISSION

Noelle Amaya

Annette Fernandez Madrid

Susan Turrell

Anthony Stuart, Chair

Jennifer Nordstrom

Jim Bandy

Robin Geck

### CITY STAFF

Aimee Amerson, Planning Manager

Shannon Beaucaire, City Manager

Gordon Monroe, Contract City Engineer

Scott Whyte, Contract City Planner

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# INTRODUCTION

The Carlton Comprehensive Plan directs all activities and decisions related to land use in Carlton over the next 20 years. Oregon state law requires all cities and counties to adopt comprehensive plans that are consistent with applicable [Oregon Statewide Land Use Planning Goals](#). These 19 goals set broad statewide policy direction for land use and are implemented locally through the Comprehensive Plan. The goals are designed to create and maintain sustainable, livable, and equitable communities. They seek to protect the natural resources and environmental quality while promoting efficient urban development and an orderly transition from rural to urban uses.

The Comprehensive Plan is a series of coordinated policy statements and a land use map that guide natural and man-made systems and services. This Comprehensive Plan includes a community vision, citywide goals and policies, the factual data and projections on which the policies were based, and a map that generally designates future locations of various types of public and private land uses, including residential, commercial, industrial, open space, and public use. The plan is coordinated, meaning that it is compatible with planning efforts of the county and state

The Comprehensive Plan helps manage expected population and employment growth in alignment with the community's vision. City leaders use the Comprehensive Plan to coordinate public investments, establish city services, and make decisions about how and where land is developed.

The Comprehensive Plan is implemented through land use regulations and procedures that connect the aspirations set forth in the vision and goal statements of the comprehensive plan to the administrative review process for development applications. Implementing ordinances include the zoning and land-division ordinances needed to put the plan into effect. These procedures establish mechanisms for ensuring consistency between the goals and policies of the Comprehensive Plan with the development code, capital improvement plans, and infrastructure plans, among others.



## THERE ARE TWELVE STATEWIDE GOALS THAT APPLY TO CARLTON'S COMPREHENSIVE PLAN:

- Goal 1 Citizen Involvement
- Goal 2 Land Use Planning
- Goal 5 Natural Resources, Scenic and Historic Areas, and Open Spaces
- Goal 6 Air, Water and Land Resources Quality
- Goal 7 Areas Subject to Natural Hazards
- Goal 8 Recreational Needs
- Goal 9 Economic Development
- Goal 10 Housing
- Goal 11 Public Facilities and Services
- Goal 12 Transportation
- Goal 13 Energy Conservation
- Goal 14 Urbanization

The other seven statewide goals are: (3) agriculture lands, (4) forest lands, (15) Willamette River Greenway, (16) estuarine resources, (17) coastal shorelands, (18) beaches and dunes, (19) ocean resources; and are not applicable to Carlton.

## PROCESS

The City of Carlton's existing Comprehensive Plan document was adopted in 2000, and most recently amended in 2009. In that time, the approximate population of Carlton has increased nearly 27 percent<sup>1</sup> alongside which, Carlton's viticultural tourism industry has continued to expand, creating an increased demand for housing, transportation, and services. The City began work on updating the Comprehensive Plan in December 2021 and has spent subsequent two year updating the Plan. The update is based on a robust community engagement process led by a Project Advisory Committee (PAC), a group of residents chosen for their varying expertise and interests. The PAC met five times to help craft the vision statement, goals, policies, and objectives, and facilitate conversations with the community. Policy language is based on input from hundreds of Carlton stakeholders that participated in the process through a series of community conversations, interviews, neighborhood meetings, online questionnaires, and community-wide summits.

## FORMAT

The Carlton Comprehensive Plan is organized by the relevant Statewide Planning Goals. Each chapter begins with a summary of the Statewide Planning Goal. Next is a synthesis of the information gathered and discussed during the development and update of the Carlton Comprehensive Plan. This section is again arranged to show how the statewide land use goals were considered during development of Carlton's Plan, and provides the factual base for the goals, policies, and objectives. Additional information on the factual basis can be found in the Comprehensive Plan appendix. Chapters end with the goals, policies, and objectives that direct future land use decisions.

<sup>1</sup> US Census Bureau. American Community Survey, 2020 5-year estimates. [Carlton city, Oregon](#)

## ENVISION CARLTON

# VISION STATEMENT

The Carlton Vision Statement guided development of the Comprehensive Plan goals, policies, and objectives. It was developed from a combination of community engagement feedback and historical context. The four vision themes represent the characteristics of Carlton that the community seeks to preserve and enhance.

## IN 2042, CARLTON IS “A GREAT LITTLE TOWN” WITH:



### RURAL HERITAGE AND SMALL TOWN CHARACTER

Carlton is a charming and welcoming town where neighbors interact frequently and take care of each other. People are active in local affairs and gather to celebrate at Carlton Fun Days and other community events. Residents are proud of the city’s agricultural legacy, which is visible through its pastoral views, preservation of historic structures and local farmers’ market. Carlton fosters a unique blend of urban convenience and a rural lifestyle.



### FAMILY-FRIENDLY NEIGHBORHOODS

Carlton is a great place to grow up, raise a family and remain active throughout later stages of life. The community invests in its youth through an excellent school system and plentiful opportunities to grow and thrive. Diverse, quality, and attainable housing is available to residents throughout all stages of life. Paths and trails connect people to schools, shops, parks, and neighboring communities making Carlton a safe place to live and play.



### A PROSPEROUS ECONOMY

Carlton’s diverse businesses meet the daily needs of its residents and offer great destinations to attract visitors. Carlton’s growing downtown is universally loved for its vibrancy and charm. Widely recognized as Oregon’s wine country capital, a variety of industries offer stable, well-paying jobs that help maintain a superb quality of life.



### WELL-PLANNED INFRASTRUCTURE

Carlton boasts modern and reliable public facilities and services that support carefully planned growth. The transportation network provides safe and efficient travel routes for walkers, bicyclists, and vehicles. Public transit is available to help people meet their daily needs. Natural systems are protected to enhance wildlife habitat and provide access to nature. Community facilities, like Wennerberg Park, Carlton Pool, the library, and community center give residents places to gather and have fun. Carlton is a resilient community that is prepared for natural disasters and enjoys expert and timely emergency response services.



# CITIZEN INVOLVEMENT

## STATEWIDE PLANNING GOAL 1

Goal 1 requires cities to establish a committee for citizen involvement responsible for oversight and evaluation of the city’s public involvement efforts related to land use planning. Goal 1 requires “the opportunity for citizens to be involved in all phases of the planning process.”<sup>2</sup> The goal also outlines the need to have a committee for citizen involvement to monitor and encourage public participation. It requires each citizen involvement program to address:

- Opportunities for widespread public involvement
- Effective two-way communication with the public
- The ability for the public to be involved in all phases of the planning process
- Making technical information easy to understand
- Feedback mechanisms for policy-makers to respond to public input, and
- Adequate financial support for public involvement efforts





## FACTUAL BASE

### CITIZEN INVOLVEMENT INITIATIVES

#### Citizen Involvement Plan

The City of Carlton has designated its Planning Commission as the Committee for Citizen Involvement (CCI) with the approval of the Land Conservation and Development Commission (LCDC). Carlton's Citizen Involvement Plan includes the following:

- **Communication.** Effective two-way communication between citizens and elected and appointed officials will be facilitated by using mail-back questionnaires, news releases and meeting notices in local newspapers, word-of-mouth, other media as available, and meeting notices included in utility statements.
- **Citizen Influence.** All citizens will have the opportunity to be involved with data gathering, plan preparation, recommending changes in the Comprehensive Plan and ordinances, participating in development, adoption, and application of legislation to carry out the Comprehensive Plan and ordinances, the evaluation of the Comprehensive Plan, and the evaluation of the Citizen Involvement Plan.
- **Technical Information.** Maps and other technical information will be made available at City Hall in a simplified and understandable form.
- **Feedback Techniques.** One technique is to provide for communication between policy makers and citizens is that minutes of all Planning Commission and City Council meetings will be taken and the rationale used to reach land use decisions will be contained therein. Another technique is making the results of city questionnaires available for public inspection and review.
- **Plan Support.** The City will allocate a portion of its planning budget to the Citizen Involvement Plan.
- **Agency Involvement.** Local, State and Federal Agencies, School Districts and Special Districts will be asked to participate as a source of data and future need projections.
- **Evaluation.** Evaluation of the Citizen Involvement Plan shall occur when the plan is amended, such as during periodic review, and when a citizen or planning commissioner should request such review based on a perceived lack of adequate involvement in a planning action or process.

#### Committees

The city has several committees to help guide planning efforts: the Budget Committee, Carlton Urban Renewal Agency, City Council, and Planning Commission. Each of these committees is tasked with some level of public involvement initiative. In addition, the Planning Department conducts a variety of involvement activities in relation to land use applications and long range planning efforts. Specifically, carrying out public notice of land use applications, in-person, and virtual consultation with community members, hosting and attending community events, and engaging with the community to assist in planning efforts like Envision Carlton 2040.

## LAND USE APPLICATIONS AND PLANS

Several application types require some varying degree of public involvement such as public notices and public discussion forums along many points of the land use process. Additionally, previous planning processes have included the creation of committees to help guide the plan. Specifically, the 2019 Carlton Parks Development Plan benefited from the insight of the Carlton Parks Committee by speaking with the residents of Carlton on needed improvements.

## GOALS, POLICIES, AND OBJECTIVES

### GOAL

To maintain a citizen involvement plan program that ensures the opportunity for citizens to be involved in all phases of the planning process.

### POLICIES AND OBJECTIVES

**POLICY 1**      **Employ a variety of methods to educate and inform citizens on matters relating to the planning process.**

**OBJECTIVE 1A**      During community engagement events, offer materials and planning expertise by the way of both physical take-home and digital options.

**OBJECTIVE 1B**      Provide opportunities to participate that are appropriate to community members of all abilities.

**OBJECTIVE 1C**      Provide opportunities to participate that are appropriate to community members of all abilities.

**POLICY 2**      **Leverage community groups and partnerships to assist in increasing our reach and ability to communicate with community members.**

**OBJECTIVE 2A**      Solicit and support participation from underrepresented populations on citizen advisory committees and commissions.

**OBJECTIVE 2B**      Use multiple forms of communication to ensure community awareness and involvement.

**POLICY 3**      **As the Committee for Citizen Involvement, the Planning Commission will meet at least once per year to review public involvement activities.**

**OBJECTIVE 3A**      Apprise city staff of effective and ineffective means for informing community members on matters related to the planning process and pending process.

**OBJECTIVE 3B**      Solicit interest from high school students for service on the Commission, specific to an advisory role, for the Commission and staff to gain perspective in reaching under-represented populations.





# LAND USE PLANNING

## STATEWIDE PLANNING GOAL 2

Goal 2 requires each local government in Oregon to have and follow a comprehensive land use plan and implementing regulations. Cities and counties must build their comprehensive plans on a factual basis and follow their plan when making decisions for appropriate zoning. City and county plans must be consistent with one another.

## FACTUAL BASE

### POPULATION AND AGE

According to 2020 Census estimates, the population of Carlton is 2,220 people. Much of the population are young to middle-aged adults, at 77.5% of residents 18 years and older. The median age is 40 years, and the average household size is 2.9 people<sup>3</sup>.

### POPULATION GROWTH

Going back to 2010 Census data, the approximate population of Carlton was 1,739 people, with the 2020 population estimate of 2,220, the population has increased by approximately 27 percent<sup>3</sup>.

## INCOME

The 2020 median household income in Carlton was \$77,917, approximately 15 percent more than the State of Oregon median income of \$65,667. Approximately 6.9% of Carlton residents are experiencing poverty, compared to Oregon's 12.4% of residents experiencing poverty<sup>3</sup>.

## RACE AND ETHNICITY

Most Carlton residents identify as White alone at approximately 82 percent of residents, followed by Some Other Race Alone at 5 percent, followed by White; Some Other Race at 4 percent. Additionally, Some Other Race alone is 5 percent, American Indian and Alaska Native alone is 1 percent, Asian alone is 0.9 percent, Black, or African American alone is 0.4 percent, and Native Hawaiian and Other Pacific Islander alone is 0.3 percent<sup>3</sup>.

## LAND USE PLANNING SYSTEM

### Comprehensive Plan

As an update to the 2000 Carlton Comprehensive Plan, the 2023 plan is organized around the applicable Oregon Statewide Planning Goals, while the second section includes synthesized information gathered during the update of the plan. The plan was developed through meetings of local government and elected officials, responses to community surveys, attendance at public meetings and hearings, and responses to draft proposals.

### Comprehensive Plan Designations and Associated Zoning

The following land use categories have been developed for use in the Comprehensive Plan map, which serves as the basis for the city zoning map:

#### RESIDENTIAL

**Residential Low Density:** The Residential-Low Density (R-1) district preserves existing single-family residential areas and provides for future single-family housing opportunities.

**Residential Medium Density:** The Residential-Medium Density (R-2) district provides for single-family and duplex housing at an average density of ten (10) dwelling units per acre or less.

**Residential High Density:** The Residential-Medium High Density (R-3) district provides opportunities for higher density housing in close proximity to substantial commercial and public development where full urban services are available.

#### COMMERCIAL

**Downtown, Winery/Gallery, Main Street, and Railroad District:** The Downtown (D) district is the historic, commercial, and civic core of Carlton. It is also a major wine-processing center for the region. As such, it offers a unique opportunity to combine local commercial services, wine making, tourism-oriented services, and public amenities in an attractive, walkable, mixed-use environment.

**Commercial Business:** The commercial business (CB) district provides an area for commercial uses outside Downtown Carlton. It provides a broad range of commercial uses appropriate within a shopping district, and a visual attraction for visitors.

**Commercial Industrial:** The commercial industrial (CI) district provides areas for a range of commercial light manufacturing, wholesale, transportation, and service uses. To assure compatibility between these uses and adjacent residential and industrial uses, special design standards are specified.

#### INDUSTRIAL

**General Industry:** The general industrial (IG) district provides land for and to encourage the grouping together of warehousing, manufacturing, and other industrial uses which, because of their normal characteristics, would be relatively objectionable when operated in close proximity to business commercial and residential uses.

#### PUBLIC FACILITY

**Public Facility:** The public facility (PF) district provides for the location of large public and semi-public lands, buildings, facilities and uses in a manner that will not unreasonably disrupt or alter areas of the community.

#### AGRICULTURAL HOLDING

**Agriculture Holding:** The agricultural holding (AH) district allows an orderly phasing of urban development of land. It is a holding district that allows agricultural uses to continue until such time that the agricultural lands are needed for urban uses and public facilities and services are available.

**MIXED-DENSITY RESIDENTIAL**

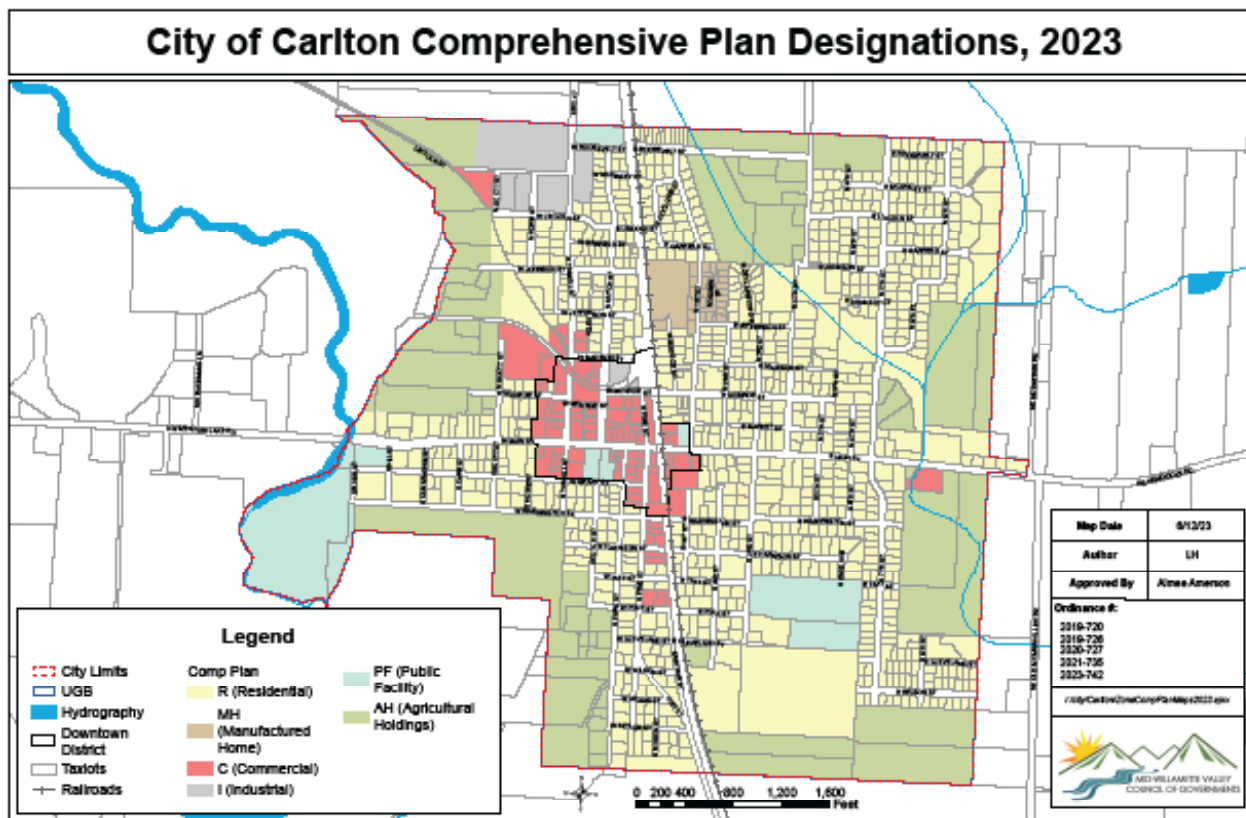
**Mixed-Density Residential:** The mixed density (MX) residential zone is intended primarily as residential area with supporting and complementary commercial and public uses.

**MANUFACTURED HOME**

**Manufactured Home:** The manufactured home (MH) district provides areas for the development of residential manufactured home parks to increase the choice and mixture of single-family housing opportunities.

**OVERLAY ZONES**

**Flood Plain Management:** The purpose of the floodplain management overlay zone is to restrict or prohibit uses which are dangerous to health, safety, and property due to water or erosion hazards or which result in damaging increases in erosion or in flood heights or velocities.



City of Carlton Comprehensive Plan Map as of June 2023

**URBAN GROWTH BOUNDARY**

The Carlton Urban Growth Boundary (UGB) is “an adopted boundary around the city that defines the area in which the city expects to grow, where public facilities will be extended, and where joint planning responsibilities are exercised with Yamhill County.”<sup>4</sup> The UGB, as shown above, is bound by North Yamhill River to the west, bordering a private drive and farmland to the south, farmland to the east, and farmland to the north.



# GOALS, POLICIES, AND OBJECTIVES

## GOAL

To maintain a land use planning process and policy framework as a basis for all decisions and actions related to the use of the land and to assure an adequate factual base for such decisions and actions.

## POLICIES

### **POLICY 1**

**Review and update or amend the Comprehensive Plan every 10 years.**

### **POLICY 2**

**Ensure land policies and procedures are addressed in the city's development code and other implementing ordinances.**

### **POLICY 3**

**Initiate a process to phase out the Agricultural Holding designation. Assign new urban land use designations to areas that are currently within the Agricultural Holding District. Agricultural uses will still be allowed for areas outside city limits, but an urban zone district will be applied upon annexation.**



# NATURAL RESOURCES, SCENIC AND HISTORIC AREAS, AND OPEN SPACES

## STATEWIDE PLANNING GOAL 5

Goal 5 requires cities to inventory their resources. The resources range from wildlife habitat to historic places, and gravel mines.

## FACTUAL BASE

### NATURAL RESOURCES

Carlton occupies the “highland” between Hawn Creek and the North Yamhill River both of which flow south approximately six miles to enter the main stem of the Yamhill River. Agriculture is widely practiced in the Carlton planning area. Approximately 280 acres, 49.6 percent of the city’s land area, are devoted to agricultural uses. Farm crops grown in the planning area range from grains and seed grasses to fruits, wine grapes, and nuts. Grazing lands also make up a significant share of the agricultural activity in the area. There are no forest lands in Carlton. However, there are a few large clusters of fir and oak trees scattered around the planning area. Trees and brush line the North Yamhill River that runs along the western edge of the city. An inventory of Natural Resources in Carlton is included as Appendix A.





## OPEN SPACE AND PARKS

There are areas within the Carlton that are desirable to preserve as open spaces. Two small streams off Hawn Creek run through the northeast section of the city. These merge and flow out of the southeast corner of the city. The riparian areas adjacent to these creeks provide ideal open space settings.

An area that is particularly suited for open space use is the vacant land in the northwest section of the city. This sloping area once overlooked Carlton Lake which also served as a wildlife refuge. The lake was drained in 1972, but the prospect of it being reestablished makes this lakeside area a potential site for park development.



## CULTURAL AND HISTORIC RESOURCES

The Tualaty Indians inhabited the area that included Carlton, hence the name Tualatin. They were of a great tribe called the Kalapuya, which constituted the population of the Willamette Valley before the European trappers and settlers entered the valley.

A railroad was built in 1872 from Portland to St. Joe, but the train did include stops along the farmland between the two stations. By 1874, a regular stop was made at what is now Carlton. The town of Carlton was formally incorporated in 1899. The Carlton State Bank and Savings building located on the northwest corner of Main and Pine is listed on the National Register of Historic Places. The property known as Westerlook Farm (the Charles Ladd Estate) built in 1912 is listed on the Statewide Inventory of Historic Sites and Buildings. Local historians agree that the wooden barn located on the southwest corner of Park and Taft is the oldest structure in Carlton. It was on the farm of John Wennerberg, an early benefactor to the town of Carlton.<sup>5</sup>

# GOALS, POLICIES, AND OBJECTIVES

## GOAL

To conserve open space, protect natural and scenic resources, and preserve historic and cultural resources.

## POLICIES AND OBJECTIVES

- POLICY 1**      **Protect and enhance natural resources through proper use, maintenance, and development.**
- OBJECTIVE 1A**      Maintain a healthy and diverse tree canopy and other publicly owned vegetation.
- OBJECTIVE 1B**      Encourage low-impact development techniques and other strategies to preserve and enhance waterways, creeks, rivers and riparian areas, and wetlands.
- OBJECTIVE 1C**      Provide notice to the Department of State Lands if development or a land division is in the vicinity of a wetland or an areas of predominantly hydric soils as shown on the State Wetlands Inventory.
- POLICY 2**      **Maintain and expand the city’s open-space network, especially greenways and open space along creeks.**
- OBJECTIVE 2A**      Ensure adequate open space and trail development in high density development and neighborhoods lacking access to these amenities.
- OBJECTIVE 2B**      Manage open space areas for their value in linking citizens and visitors with the natural environment.
- POLICY 3**      **Identify sites and structures relating to the history of the state and the city that should be identified, protected, and enhanced.**
- OBJECTIVE 3A**      Encourage property owners to preserve and restore historic structures, sites, and elements especially within the downtown core and urban renewal district.
- OBJECTIVE 3B**      Register qualified buildings and structures on National and/or State Registry of Historical Sites.
- OBJECTIVE 3C**      Consider the reuse or relocation of city-owned historical structures as an alternative to redevelopment or demolition.
- OBJECTIVE 3D**      Apply baseline protections as described in OAR 660-0200(8) to any sites on the National Register of Historic Places.
- POLICY 4**      **If archeological sites are identified in the city, coordinate with the State Historic Preservation Office to establish a review procedure that meets state requirements.**
- POLICY 5**      **Preserve and maintain creeks and floodplain areas as open space to provide a natural storm water and drainage system.**
- POLICY 6**      **Preserve the water quality, ground water recharge, and flood storage functions of wetlands.**
- POLICY 7**      **Work with the Oregon Department of Fish and Wildlife to update factual background information in the Comprehensive Plan Appendix.**





# AIR, WATER, AND LAND RESOURCES QUALITY

## STATEWIDE PLANNING GOAL 6

Goal 6 guides local governments to consider the protection of air, water and land resources from pollution and pollutants when developing a comprehensive plan. The pollutants addressed in Goal 6 include solid waste, water waste, noise and thermal pollution, air pollution, and industry-related contaminants.

## FACTUAL BASE

### AIR QUALITY

The closest nearby air monitoring station to Carlton is in Tualatin. This station is monitored by the Environmental Protection Agency (EPA). The Outdoor Air Quality program offers daily and annual data downloads of measured air pollutants. A key data point for measuring air quality comes from the amount of particulate matter (PM) lower PM count indicating better air quality. 2022 data for the nearest air monitoring station in Tualatin station showed a daily count of 26 PM2.5, which is considered “Good” air quality.<sup>6</sup> The Oregon Department of Air Quality currently prohibits open burning seasonally. Domestic and yard debris open burning is prohibited except for the burning of yard debris between March 1 and June 15, and between October 1 and December 15.

### WATER QUALITY

The city operates and maintains the existing water system and delivers water to its consumer base utilizing Panther Creek/Carlton Reservoir as a source. The *2020 Carlton Drinking Water Report* deemed the water safe and meeting all state and federal regulations.

### TOPOGRAPHY

Carlton is relatively flat, with some areas of elevation in the southwestern part of the city. The defining geographic feature is the North Yamhill River to the west, running along the western side of Carlton.

<sup>6</sup> United States Environmental Protection Agency. [Interactive Map of Air Quality Monitors](#).

According to the US National Land Cover Database, the developed areas of Carlton are largely surrounded by cultivated crops, pasture/hay, and woody wetlands. The developed areas of the city range from clusters of developed open space, to moving inwards towards downtown, areas of low to high intensity development.<sup>7</sup> Carlton Soils consist of very deep, moderately well drained soils that formed in mixed alluvium and colluvium. Carlton soils are on terraces, toeslopes, and footslopes and have slopes of 0 to 20 percent.<sup>8</sup>

Yamhill County, in common with all western Oregon, has a modified marine climate. Yamhill County has three climate zones, distinguished mainly by elevation: the valley floor, the foothills of the Coast Range, and the Coast Range.<sup>9</sup>

Yamhill County’s 12-month total precipitation increased 1.1 inches from June 1900 to May 2022. From June 1900 to May 2022, the average 12-month total precipitation was 60.3 inches. The 12-month average temperature increased 0.8°F from June 1900 to May 2022. From June 1900 to May 2022, the 12-month average temperature was 51.2°F.<sup>10</sup>

## **GOALS, POLICIES, AND OBJECTIVES**

### **GOAL**

To maintain and improve the quality of the air, water, and land resources of the city.

### **POLICIES AND OBJECTIVES**

- POLICY 1**                    **Protect air, water, and land quality from the impacts of development through applicable state or federal environmental quality standards.**
  
- OBJECTIVE 1A**            Encourage the use of pervious surfaces in new development to prevent the negative ecological effects of urban stormwater runoff.
  
- OBJECTIVE 1B**            Prioritize on-site stormwater management except where the City determines it to be inefficient or infeasible.
  
- OBJECTIVE 1C**            Promote land-use patterns that offer opportunities for amenities close to residential areas to reduce vehicle miles travelled and associated emissions.
  
- OBJECTIVE 1D**            Development within the city shall comply with applicable state and federal water quality regulations.
  
- OBJECTIVE 1E**            Respond to directives issued in a Total Maximum Daily Load (TMDL) Implementation Plan for any waterways within the city that are declared water quality limited by the Department of Environmental Quality.
  
- POLICY 2**                    **Encourage lighting design and practices that reduce the negative impacts of light pollution.**
  
- OBJECTIVE 2A**            Manage city lighting so that they are only on when needed, only light intended areas, are no brighter than necessary, minimize blue light emissions, and eliminate upward-directed light.
  
- POLICY 3**                    **Participate in appropriate environmental quality planning efforts on a regional level.**
  
- OBJECTIVE 3A**            Collaborate on significant environmental quality protective measures with neighboring communities.

<sup>7</sup> Multi-Resolution Land Characteristics (MRLC) Consortium. [National Land Cover Database \(NLCD\) Viewer](#).

<sup>8</sup> United States Department of Agriculture Natural Resources Conservation Service. [2006 National Cooperative Soil Survey for Carlton, Oregon](#).

<sup>9</sup> Yamhill County. [Natural Hazards Mitigation Plan](#).

<sup>10</sup> USAFACTS. *Climate in Yamhill County, Oregon*



# AREAS SUBJECT TO NATURAL DISASTERS AND HAZARDS

## STATEWIDE PLANNING GOAL 7

Goal 7 requires the comprehensive plan to address Oregon's natural hazards. Protecting people and property from natural hazards requires knowledge, planning, coordination, and education.

## FACTUAL BASE

While Yamhill County is generally described as having a mild climate and a relatively flat terrain, except for hills located toward the Coast Range, natural hazards do present a threat. The *2006 Yamhill County Natural Hazards Mitigation Plan* and the *2020 City of Carlton Addendum* to that plan, assesses vulnerability and risk to a range of natural hazards that may occur in the city.

## DROUGHT

The City's primary water source is from Panther Creek Reservoir and Panther Creek. The City also has a water right permit for a potential source on Fall Creek and from the Willamette River via the Yamhill Regional Water Authority (although infrastructure is not yet developed to access this source).

State-wide droughts have historically occurred in Oregon, and as it is a region-wide phenomenon, all residents are equally at risk. Structural damage from drought is not expected; rather the risks apply to humans and resources.



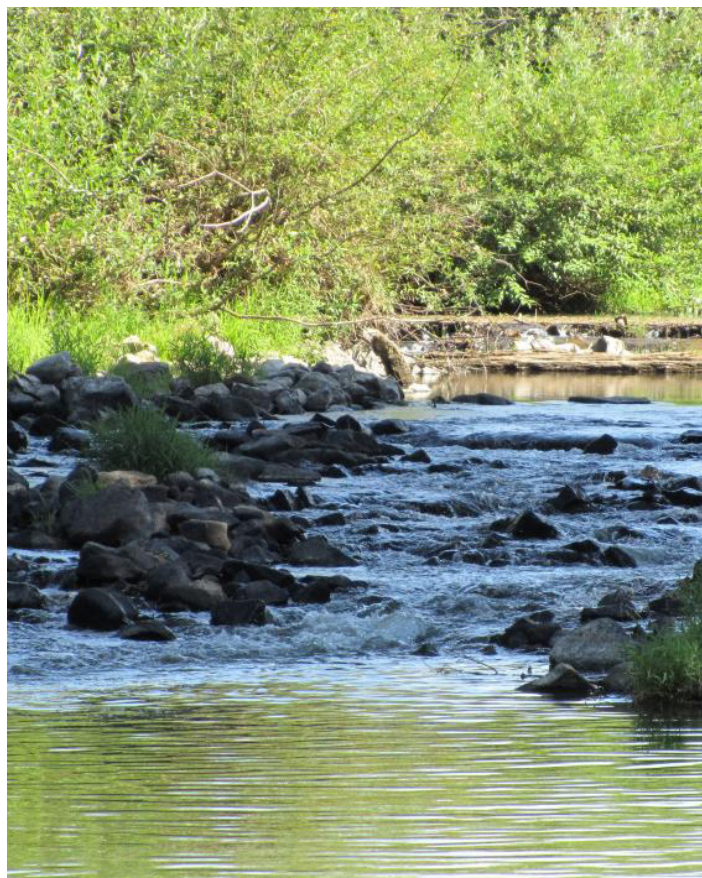
Industries important to Carlton's local economy such as agriculture and timber have historically been affected, and any future droughts would have tangible economic and potentially human impacts.<sup>11</sup>

## EARTHQUAKE

Social and geological records show that Oregon has a history of seismic events. Oregon has experienced damaging earthquakes in the historical past, and geologic evidence indicates that because of the city's increasing population and development, Oregon may expect earthquakes with even greater damage potential to occur in the future. South of McMinnville, near Dayton, there is a series of inferred faults (faults that extend underground from a visible fault) and concealed faults (completely underground faults). With its location in the Pacific Northwest, Yamhill County is susceptible to both intraplate and subduction zone earthquakes.

## FLOOD

In addition to the Willamette River, Yamhill County contains two other large rivers (North and South Yamhill Rivers) and smaller tributaries that are susceptible to annual flooding events. Two types of flooding primarily affect Yamhill County: urban flooding and riverine flooding. Urban flooding can be explained as when land is converted from fields or woodlands to roads and parking lots, it loses



its ability to absorb rainfall. Riverine flooding is the over-bank flooding of rivers and streams and is the most common flood hazard in Oregon.

## LANDSLIDE

A 1998 study completed by the Oregon Department of Geology and Mineral Industries (DOGAMI) states that although few landslides develop in the Willamette Valley as compared to more mountainous parts of the state, the marine sedimentary rock units in southern Yamhill County and the edges of the valley are susceptible to large slides. Currently there is no comprehensive list of landslide events and/or dates for Yamhill County. Landslides probably accompany every major storm system that impacts western Oregon. A DOGAMI study of the western portion of the Salem Hills indicated that slopes nearest to the Willamette River contain the greatest risk of landslide.

## SEVERE WEATHER

Damage from high winds generally has resulted in downed utility lines, and trees usually limited to several localized areas. Electrical power can be out anywhere from a few hours to several days. Outdoor signs have also suffered damage. If the high winds are accompanied by rain, blowing leaves, and debris clog drainage-ways, which in turn may cause localized urban flooding.

Severe winter storms can produce rain, freezing rain, ice, snow, cold temperatures, and wind. Ice storms accompanied by high winds can have destructive impacts, especially to trees, power lines, and utility services. Both can produce widespread impacts on people and property throughout Yamhill County.

## WILDFIRE

Significant agricultural areas of the Willamette Valley and north and central Oregon are prone to wildfire damage. Communities are also at risk from wildfires, and substantial hazards exist for communities at the wildland/urban interface. A lack of firebreaks surrounding buildings, limited water availability during the high-risk summer months, and fire suppression over the last 100 years contribute to a fire hazard in the forested hillsides of Yamhill County.

<sup>11</sup> City of Carlton. [Addendum to the Yamhill County Multi-Jurisdictional Hazard Mitigation Plan](#)



# GOALS, POLICIES, AND OBJECTIVES

## GOAL

To protect people and property from the effects of natural hazards.

## POLICIES AND OBJECTIVES

- POLICY 1**      **Concentrate urban uses on suitable lands, and limit development in flood plains, areas susceptible to wildfire, and lands with steep slopes and/or unstable soils.**
- OBJECTIVE 1A**      Limit development in flood plains through the land use application process. Ensure continued Compliance in the National Flood Insurance Program.
- OBJECTIVE 1B**      Permit non-residential development in the flood fringe (the outer portions of the floodplain) if it satisfies local code requirements regarding the height of the structure’s main floor above floodwaters, ‘flood proofing’ construction, displacement of floodwaters, and similar matters.
- OBJECTIVE 1C**      Identify and map potential areas for landslides – high, moderate, and low.
- POLICY 2**      **Promote earthquake hazard awareness and hazard mitigation activities by providing information to residents, such as retrofitting measures that can reduce the vulnerability of dwellings.**
- POLICY 3**      **Maintain procedures to advise applicants for development permits of the areas known to have a potential for natural hazard effects.**
- POLICY 4**      **Develop a disaster preparedness plan that outlines how the city will prevent, protect against, mitigate, respond to, and recover from natural disasters.**
- OBJECTIVE 4A**      Ensure key city services, such as water and sewer have the capability for back-up electricity during emergencies.
- OBJECTIVE 4B**      Coordinate with other agencies and partners to ensure critical services are provided during emergencies.
- OBJECTIVE 4C**      Develop and implement programs to coordinate maintenance and mitigation activities to reduce risk to public infrastructure from severe winter storms.
- OBJECTIVE 4D**      Evaluate ash impact on stormwater drainage system, utility infrastructure, transportation network, public facilities, and develop mitigation actions.
- OBJECTIVE 4E**      Coordinate wildfire mitigation action items through the Yamhill County Community Wildfire Protection Plan.
- OBJECTIVE 4F**      Provide wildland fire information in an easily distributed format for all residents.
- POLICY 5**      **Work with Yamhill County and neighboring jurisdictions to update the Yamhill County Multi-Jurisdictional Natural Hazard Mitigation Plan by January 2026 to comply with new requirements from the Federal Emergency Management Agency.**



# RECREATIONAL NEEDS

## STATEWIDE PLANNING GOAL 8

Goal 8 requires local governments to plan for the recreation needs of their residents and visitors.

## FACTUAL BASE

### PARKS AND RECREATION

Parks and Recreation is a division within the Carlton Public Works Department. The City manages three public parks within the city limits. Wennerberg Park offers a disc golf course in the lower section of the park. Additionally, the City operates the Carlton Pool during the warm weather months of the year. Other recreation facilities include picnic facilities, a basketball court, three baseball diamonds, playground equipment, and three picnic pavilions.

### CARLTON PARKS DEVELOPMENT PLAN

Developed in 2019, the *Carlton Parks Development Plan* prepares Carlton for population growth and an increase in residential development. The city has experienced only moderate growth in recent years, but several large residential

subdivision projects planned for the community will result in a steady increase in population in coming years. The *Parks Development Plan* includes a Capital Improvement Program for park facilities.

The purpose of the Plan is to identify park and recreation amenities that will meet the needs of the community. The Plan serves as a guide for future development of parks within the community. More specifically, the purpose of the Plan is to identify current and future park and recreation needs, park and recreation goals and policies, propose parks and recreation facility improvements designed to meet future needs, identify general areas where new parks facilities could be developed, develop costs estimates for proposed parks and recreation facilities improvements, and identify reimbursement and improvement system development charge (SDC) requirements.



Wennerberg Park, located at the western edge of the city limits and adjacent to the South Yamhill River, is approximately 18.85 acres in size. The park provides for a mixture of recreation activities, with three baseball fields, two picnic pavilions, barbecue sites, and access to the North Yamhill River.

## IMPROVEMENTS

The *Carlton Park Development Plan* recognizes the need to provide additional parkland in developing areas of the city to maintain the existing level of service as the city grows. Carlton's 23.16 acres of parkland represents 10.2 acres of parkland per 1,000 residents. In the year 2040, based on a population forecast of 3,204 residents, the city should have 32.68 acres of parkland to stay in line with the National average. This would require an addition of 9.5 acres.



## ASSETS

The City of Carlton owns and maintains approximately 23.18 acres of parkland. These parklands are classified as mini parks, neighborhood parks, and community parks. City parks offer a range of opportunities and provide amenities for a variety of user groups.

### CITY OF CARLTON PARK ASSETS

Park	Size and Location
JR Meadows	East, currently under development
Ladd Park	Downtown, approximately 1.46 acres in size
Hawn Creek Park	Northeast (adjacent to Hawn Creek), approximately 2.88 acres in size and currently undeveloped
Wennerberg Park	West (adjacent to the South Yamhill River), approximately 18.85 acres in size

Source: 2019 Carlton Parks Development Plan

Ladd Park, located downtown, is approximately 1.46 acres in size and contains picnic facilities, playground equipment, a sports court, the city pool (1935) and site of the 1921 Ladd Fountain. The park is well situated regarding the downtown commercial core.

Hawn Creek Park is in the northeast section of the city, adjacent to Hawn Creek, it is approximately 2.88 acres in size and currently undeveloped. This park was dedicated as part of the Carlton Crest Subdivision, a 155-unit subdivision that was granted preliminary approval in June 2005.



# GOALS, POLICIES, AND OBJECTIVES

## GOAL

To satisfy the recreational needs of Carlton's community and visitors alike.

## POLICIES AND OBJECTIVES

**POLICY 1**      **Develop a high-quality, diverse system of parks and park programs that provide adequate and equitable park access to all residents.**

**OBJECTIVE 1A**      Identify and reserve land for parks and recreation within the urban growth boundary.

**OBJECTIVE 1B**      Encourage developers to dedicate park sites as a part of the land use process.

**OBJECTIVE 1C**      Ensure adequate park and trail development in high density development and neighborhoods currently disconnected from these amenities.

**POLICY 2**      **Create a network of shared-use pedestrian and bicycle trails to enable connectivity between parks, neighborhoods, schools, and public amenities.**

**OBJECTIVE 2A**      Work with Cycle Yamhill County to establish and promote trails and other outdoor recreation projects.

**POLICY 3**      **Coordinate with adjacent jurisdictions to plan for and create parkland and recreational facilities.**

**OBJECTIVE 1A**      Ensure the adequacy of pedestrian and bicycle connections to local, county, and regional trails.

**POLICY 4**      **Establish and maintain a healthy urban forest by encouraging a diverse selection of trees in parklands.**





# ECONOMIC DEVELOPMENT

## STATEWIDE PLANNING GOAL 9

Under Goal 9, all local governments should have a working inventory of areas suitable for economic growth that can be provided with public services.

## FACTUAL BASE

Carlton's economy has historically been based on the agricultural and forest industries. In the early 1900s, the area was identified as the state's "logging center". Over the years, Carlton has been home to several logging companies and the Carlton Manufacturing Company sawmill operations. Changes in the economy drove many lumber companies out of business and eventually led to the closure of the Carlton Manufacturing Company. Early agricultural activities were centered on hops, hay, pigs, and fruit and nut trees.

Traditional extractive industries continue to have a significant impact upon the local economy. Carlton is currently home to many wineries and a dozen horse farms. The city has also experienced recent growth in other industries such as the service, construction and trade, transportation and utilities sectors. Despite the recent diversification of the Carlton economy, the area continues to rely heavily upon McMinnville and other larger cities for most of its commercial and other service needs.

## INDUSTRY

The largest employment industries in Carlton are Education and Healthcare, Manufacturing, Retail Trade, Public Administration, and Construction. Nearly 72% of Carlton’s workforce is employed by one of these industries.

### PERCENT OF TOTAL CARLTON WORKFORCE BY INDUSTRY

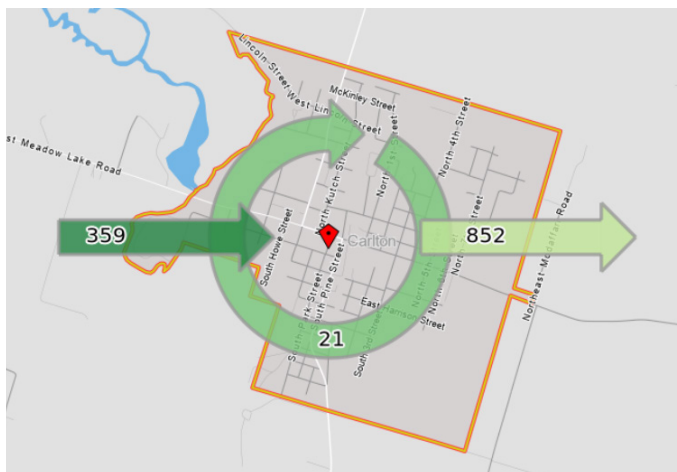
Industry	Percent
Trade/Transportation/Utilities	17%
Natural Resources/Mining	13%
Government	14%
Manufacturing	14%
Education/Health Services	15%
Construction	4%
Leisure/Hospitality	8%
Professional/Business Services	6%
Other services	3%
Financial Activities	5%
Information	1%
<b>Total</b>	<b>100%</b>

Source: US Census Bureau 2020 US Census Data. Carlton city, Oregon

## COMMUTING

2019 US Census Data shows that only 2.4% of people who live in Carlton, also work in Carlton. The graphic below depicts that 359 people live outside of Carlton, but work in Carlton. 21 people live and work in Carlton, and 852 people live in Carlton, but work elsewhere.

### CARLTON EMPLOYMENT GROWTH FORECAST, 2005 – 2027



Source: US Census Bureau. ‘On the Map’ 2019

## URBAN RENEWAL

In June 2009, the Carlton City Council adopted the *Carlton Urban Renewal Plan* that identifies several projects for the urban renewal area, including improving fire flows (replace water main), streetscape and sidewalk improvements, underground utilities, downtown park improvements, and administration. The Carlton Urban Renewal Agency (CURA) is made up of the mayor and six City Councilors, also known as the Board of Directors.



## ORGANIZATIONS

Economic Development in Carlton is presided over by both the Carlton Business Association and Yamhill County. The Business Association is “an association of businesses and individuals, organized to promote the economic vitality of the greater Carlton business community, while preserving its civic, cultural, and historic well-being.”<sup>12</sup> Yamhill County produced the 2009 *Yamhill County Agri-Business Economic and Community Development Plan* to look to the future for the county’s agriculture and tourism industries.



## TRENDS

A 2017 report titled *Carlton, OR: Economic and Demographic Profile* produced by the Northwest Economic Research Center concluded that “while data limitations preclude exact figures, it is reasonable to assume that the wine industry creates a cluster of economic activity that includes large segments of employment in Manufacturing and Leisure and Hospitality. In fact, the wine industry is a key “traded cluster” that brings outside dollars into the city. While it should not be emphasized to the detriment of the many industries that indirectly support it, wine will remain an important facet of the local economy and trends should be noted. The persistent employment growth in Leisure and Hospitality over the last decade is likely to continue, thanks to wine tourism.”<sup>13</sup>

The following table projects total employment growth through the year 2027. This projection shows that 281 new jobs will be added over the planning horizon, for a total employment of 1,070 by 2027. This represents an increase of 35.6 percent over 2005 total employment.<sup>14</sup>



### CARLTON EMPLOYMENT GROWTH FORECAST, 2005 – 2027

Sector	2005		2027	
	Percent	Total	Percent	Total
<b>Agriculture, Forestry, Fishing &amp; Hunting</b>	30%	237	30%	321
<b>Construction</b>	10.3%	82	10.3%	111
<b>Manufacturing</b>	23.7%	187	23.7%	254
<b>Wholesale Trade, Transportation, and Warehousing</b>	8.0%	63	8.0%	86
<b>Retail Trade</b>	3.9%	31	3.9%	42
<b>Finance and Insurance</b>	2.3%	18	2.3%	24
<b>Services and Real Estate</b>	9.4%	157	9.4%	213
<b>Public Sector Employment</b>	1.8%	14	1.8%	19
<b>Total</b>		<b>789</b>		<b>1070</b>

Source: *Carlton Comprehensive Plan as amended June 2009, Table 8, Total Employment Projection, Mid-Willamette Valley Council of Governments, 2007*

<sup>13</sup> [Carlton, OR: Economic and Demographic Profile \(pdx.edu\)](#)

<sup>14</sup> See *Comprehensive Plan Appendix: Inventory (August 2023)* for year 2007 inventory of buildable commercial and Industrial lands, in addition for needs assessment from year 2007.

# GOALS, POLICIES, AND OBJECTIVES

## GOAL

To diversify and improve the economy of Carlton.

## POLICIES AND OBJECTIVES

- POLICY 1**      **Plan for an adequate supply of commercial and industrial land to accommodate the types and amount of economic development and growth anticipated in the future.**
- OBJECTIVE 1A**      Identify current and potential commercial and industrial land within the urban growth boundary and analyze it based on market factors and its suitability for economic growth.
- POLICY 2**      **Create conditions that encourage growth of existing businesses and entrepreneurs, and attract new businesses to create jobs with a range of wages.**
- OBJECTIVE 2A**      Support heritage industries such as agriculture and forestry.
- OBJECTIVE 2B**      Limit the amount of commercial use allowed on land with an industrial zone designation.
- OBJECTIVE 2C**      Promote commercial development in the downtown core that will diversify the local economy where those businesses are compatible with the city's small-town character, provide necessary services and limit large commercial options.
- POLICY 3**      **Implement policies and programs to support and encourage local, commercial development downtown.**
- OBJECTIVE 3A**      Seek input from existing local businesses downtown during decision-making processes.\
- OBJECTIVE 3B**      Ensure land uses and transportation connections that provide access for residents and support tourism within the downtown core.





# HOUSING

## STATEWIDE PLANNING GOAL 10

Under Goal 10, all local governments should have a working inventory of areas suitable to provide an adequate housing supply that offers a range of different places to live, different community densities to choose from, and does not overburden the financial resources of any group living there.

## FACTUAL BASE

### CURRENT HOUSING

The housing stock in Carlton totals approximately 870 units and consists predominantly of owner-occupied detached single-family units. As of 2020 there is a 5.9% vacancy rate in Carlton or approximately 55 vacant housing units. The median gross rent in Carlton is about \$1,270, slightly above the Oregon average.<sup>15</sup>



## TRENDS

Carlton last analyzed its housing needs in 2007 when the Mid-Willamette Valley Council of Governments conducted a buildable land inventory for the City of Carlton and used it in conjunction with a 2027 population forecast. The housing needs analysis determined that 233 new residential units would be needed to accommodate the projected 2027 population of 2,379 people. The 233 units include 176 single family dwelling units and 57 multifamily dwelling units as shown in the table below.<sup>16</sup>



### CARLTON HOUSING NEEDS 2007-2027

Dwelling Unites needed by 2027	Single-Family Units	Multi-family Units	Total
Dwelling Units needed to Meet 2007 Rental Demand	9	18	27
Rental Units Needed by 2027	18	39	57
Owner-Occupied Units Needed by 2027	149	0	149
<b>Total Units</b>	<b>176</b>	<b>57</b>	<b>233</b>

Source: Carlton Comprehensive Plan as amended June 2009, Table 26, Additional Dwelling Units Needed in Carlton by 2027, Mid-Willamette Valley Council of Governments, 2007

<sup>16</sup> See *Comprehensive Plan Appendix: Inventories (August 2023)* for year 2007 inventory of buildable residential lands, in addition for needs assessment from year 2007



# GOALS, POLICIES, AND OBJECTIVES

## GOAL

To provide housing options to meet the needs of current and future residents.

## POLICIES AND OBJECTIVES

- POLICY 1**      **Permit new developments only when all urban services become available. These services include: public water, sanitary sewers, storm drainage, solid waste collection, streets, parks and recreation facilities, and adequate police, and fire protection.**
- POLICY 2**      **Monitor residential land development to ensure that there is enough residential land to accommodate the long-term forecast for population growth.**
- POLICY 3**      **Encourage a mix of housing types dispersed throughout the city and within neighborhoods including attached and detached single-family housing and multifamily options.**
- POLICY 4**      **Encourage the development and preservation of housing affordable to low-to moderate-income households.**
- OBJECTIVE 4A**      **Protect existing manufactured home parks to retain existing homes.**
- OBJECTIVE 4B**      **Review development code to remove barriers to middle housing types, including plexes, townhomes, and cottage clusters.**
- POLICY 5**      **Encourage the development of housing options that are accessible to people of all abilities and allow residents to age in place. Specifically smaller, single-level housing options.**



# PUBLIC FACILITIES AND SERVICES

## STATEWIDE PLANNING GOAL 11

Goal 11 requires municipalities to prepare Public Facilities Plans to plan and identify necessary infrastructure to serve development within the UGB. The Public Facilities Plan is required to be adopted as a supporting document to the comprehensive plan.

## FACTUAL BASE

### WATER RESOURCES

Carlton's original water system was constructed in about 1911. The initial infrastructure appears to have included a 30 foot long, 3-foot-high concrete dam across Panther Creek just downstream of the current reservoir dam and a 9-mile-long pipeline into town. In 2003 the water treatment plant was expanded and upgraded, and steel reservoir was constructed.

The *2014 Carlton Water Master Plan* evaluates the city's water system with respect to existing and future needs, identifies improvements and associated costs, and provides the city with a framework for water service through 2033.

The report outlines a series of ranked recommendations to increasing resiliency of the water systems. Regarding water supply, the findings suggest that the Panther Creek/Carlton Reservoir source serves the city well, but it is subject to at least two challenges that can reduce its reliability. One is the high sediment and silt loads that can occur in conjunction with major winter storms. The other is the occurrence of higher temperatures and algae blooms that are believed to be exacerbated by the significant silt accumulation in Carlton Reservoir.



## STORMWATER MANAGEMENT

The 2002 *Carlton Storm Drainage Master Plan* includes an evaluation of the existing storm water system and recommendations for improvements. Drainage from the western portions of Carlton flow to the northwest and southwest into the North Yamhill River. Drainage from the eastern portions of Carlton flow to the northeast and southeast into a tributary of Hawn Creek. The railroad right-of-way running through town roughly defines the east-west runoff and Monroe Street divides the north-south drainage. Carlton's storm drainage systems are comprised of a series of roadside ditches or swales that often are discontinuous across individual properties.

## WASTEWATER SERVICES

The 2018 *Carlton Wastewater Facilities Plan* reviews existing conditions, determines regulatory requirements, identifies future needs, deficiencies, alternatives, sets actions for upgrading the collection and treatment facilities for the next 20 years. Existing wastewater facilities consist of a conventional sewer collection system, including two pump stations, which convey flows to a wastewater treatment plant that provides secondary treatment and disinfection. Effluent is discharged to the North Yamhill River from November through April and is used for irrigation on land adjacent to the treatment plant lagoons in the summer.

## OTHER SERVICES

### Police & Fire

The Carlton Police Department is responsible for enforcement of state and local laws in the city. The Police Department enforces the state traffic laws within the city and has the primary responsibility for enforcement of the Municipal Code. Incarceration facilities are provided by Yamhill County in McMinnville. Backup law enforcement services are available as required from the Yamhill County Sheriff's Department and the Oregon State Police. City officers are available to provide 24-hour service. The Primary Public Safety Answering Point (PSAP) serving Carlton residents with 9-1-1 answering and dispatch for the police, ambulance and fire services is provided through the Yamhill County Communications Agency (YCOM).

The Carlton Fire Department provides fire protection services for the city, and on a contract basis, the surrounding Carlton Rural Fire Protection District. The total district encompasses an area of approximately 30 square miles. The department is a volunteer organization.

## Civic Facilities

The City of Carlton City Hall building on Main Street constructed in 1974 was recently demolished to make way for the new City Hall building under construction slated to open in 2024. The City also maintains the Carlton City Pool.

## Schools

Educational services are provided by the Yamhill-Carlton School District #1 that operates the city's only school. The Yamhill Carlton Elementary School services an area encompassing approximately 45 square miles. Besides basic education for kindergarten through grade eight, the elementary school also offers a pre-school program for four-year-olds and provides for the education of students with special needs. The Yamhill Educational Service District (ESD), with headquarters in McMinnville, provides some additional alternative education programs.

The Yamhill-Carlton School District is composed of Yamhill Carlton High School, Yamhill Carlton Intermediate School, Yamhill Carlton Elementary School, and Alliance Academy. The 2016-2017 school year saw a total enrollment of 1,033 students from kindergarten to grade 12<sup>17</sup>.



# GOALS, POLICIES, AND OBJECTIVES

## GOAL

To plan and develop a timely, orderly, and efficient arrangement of public facilities and services to serve as a framework for urban development consistent with the city's vision.

## POLICIES AND OBJECTIVES

- POLICY 1**      **Modernize and maintain municipal facilities in the most efficient and cost-effective manner to adequately serve the existing population and anticipated growth.**
- OBJECTIVE 1A**      Plan, operate and maintain the water distribution, stormwater, and sewer management systems for all current and anticipated city residents within its existing urban growth boundary and plan strategically for future expansion areas.
- POLICY 2**      **Identify and promote equitable sewer, water, and stormwater assessment methodologies.**
- OBJECTIVE 2A**      Identify and remediate areas currently underserved by infrastructure.
- OBJECTIVE 2B**      Make investments to support the equitable provision of infrastructure.
- OBJECTIVE 2C**      Coordinate with franchise utilities to encourage equitable access to services.
- POLICY 3**      **Examine, identify, and promote energy efficient and cost-effective methods to provide and maintain public facilities and services.**
- POLICY 4**      **Ensure adequate and responsive emergency services for the Carlton community.**
- POLICY 5**      **Establish and maintain a healthy tree canopy by encouraging a diverse selection of trees adaptable to the changing climate for the city's streetscapes.**
- POLICY 6**      **Preserve and protect existing healthy mature trees along streets, especially in rights-of-way and planting strips, through development and maintenance of those rights-of-way.**





# TRANSPORTATION

## STATEWIDE PLANNING GOAL 12

Goal 12 requires cities, counties, and the state to create a transportation system plan that takes into account all relevant modes of transportation: mass transit, air, water, rail, highway, bicycle and pedestrian.

## FACTUAL BASE

### ASSETS

The City of Carlton is effectively divided into four quadrants by two major arterials. Highway 47 divides the city east and west. Highway 47 enters the city from the south as Pine Street, it makes a series of turns through downtown providing a two-block east-west segment along Main Street, then exits the city to the north as Yamhill Street. Main Street divides the city north and south.

West of the city limits, Main Street becomes Meadowlake Road. East of the city limits Main Street becomes Hendricks Road.

Carlton is currently served by the Yamhill County Transit Route 33 bus that runs from McMinnville to Hillsboro. It runs Monday through Friday to the shelter located on North Pine Street. There are currently five northbound pickup times and five southbound pickup times per day.<sup>18</sup>

*This chapter of the Comprehensive Plan will be updated upon completion of the 2024 Carlton Transportation System Plan to ensure that the two documents are aligned in background information, goals and policies.*



## TRANSPORTATION SYSTEM PLAN

The *2009 Carlton Transportation System Plan (TSP)*<sup>19</sup> establishes the city's goals, policies, and strategies for developing and improving the transportation system within the Carlton Urban Growth Boundary. The Carlton TSP serves as a 20-year plan to guide transportation improvements and enhance overall mobility for vehicles, pedestrians, and bicyclists throughout the city. The goals are:

- Preserve the function, capacity, level of service, and safety of State Highway 47.
- Enhance the transportation mobility and safety of the local street system.
- Increase the use of alternative modes of transportation (walking, bicycling, rideshare/ carpooling, and transit) through improved access, safety, and service. Increasing the use of alternative transportation modes includes maximizing the level of access to all social, work, and welfare resources for the transportation disadvantaged. Carlton seeks for its transportation disadvantaged citizens the creation of a customer-oriented regionally coordinated public transit system that is efficient, effective, and founded on present and future needs.
- Improve coordination between the City of Carlton, Yamhill County, and the Oregon Department of Transportation (ODOT).

## TRENDS

Key needs and trends associated with the city's transportation system as written in the TSP, are outlined below.

- Recently Rezoned Areas - identify transportation improvements needed to serve areas recently rezoned to meet the city's projected residential and employment land needs through the year 2027.
- Local Street Network Plan - incorporate recent amendments to the Local Street Network Plan and update for recently rezoned areas.
- Bicycle and Pedestrian elements - were not adequately addressed in 1999 TSP and are outdated. An update is needed to identify and provide detailed project descriptions and cost estimates for an improved system of pedestrian and bicycle routes and investigate the feasibility of a trail within or along railroad right-of-way and spur routes. A recent city emphasis is sidewalk construction, so pedestrian needs identified in the TSP must be updated and prioritized, with cost estimates.
- Roadway Functional Classifications and Street Design Standards - review all classifications and street design standards, including street width and sidewalk requirements, to ensure they match the needs of the community and provide for adequate pedestrian facilities. Work with the Oregon Department of Transportation (ODOT) to establish a cross section for Highway 47, considering the Special Transportation Area designation within the downtown.
- Downtown Truck Bypass -review with ODOT the need and feasibility of routing truck traffic around the downtown.
- Rail Crossings - review rail crossing needs with the ODOT Rail Program and update as necessary.
- Capital Improvement Program - update and develop a Transportation Systems Development Charge (TSDC) for adoption.
- Safe Routes to School (SRTS) - inventory pedestrian and bicycle facilities within the walk zone of Carlton Elementary School and identify key deficiencies and barriers to students walking or biking to school.



## IMPROVEMENTS

The conclusion of the TSP divides its recommendations by roadway, pedestrian, bicycle, and transit improvements. Roadway improvements consist of improving the turning radius of identified areas, installing center left-turn lanes, constructing a Main Street bypass, and connecting street access to the railroad right-of-way. Pedestrian improvements consist of installing sidewalks, providing connection across the railroad, and constructing a multi-use path along right-of-way. Bicycle and transit improvements consist of installing bike lanes, providing local funds to expand the Yamhill Transit service, and constructing a transit stop on Main Street.

## GOALS, POLICIES, AND OBJECTIVES

### GOAL

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

### POLICIES AND OBJECTIVES

**POLICY 1**      **Plan for a multi-modal transportation system accessible for all users.**

**OBJECTIVE 1A**      Make investments to accommodate multi-modal traffic on major and minor arterial roads.

**OBJECTIVE 1B**      Inventory bicycle and pedestrian networks and plan for needed infrastructure improvements.

**POLICY 2**      **Establish and design facilities that improve safety of all users of the transportation system.**

**OBJECTIVE 2A**      Identify and implement ways to minimize conflicts between different modes of travel.

**POLICY 3**      **Support improvements that make downtown inviting and access to businesses safe and convenient for pedestrians and bicycles.**

**POLICY 4**      **Coordinate facility improvements and services with regional partners such as Yamhill County and Oregon Department of Transportation (ODOT).**

**POLICY 5**      **Explore opportunities to provide or participate in local or regional public transit programs to provide transportation services to local residents.**

**POLICY 6**      **Preserve the function, capacity, level of service, and safety of State Highway 47.**

**OBJECTIVE 6A**      Coordinate all transportation-related activities impacting Highway 47 with the Oregon ODOT.

**OBJECTIVE 6B**      Conform to ODOT standards and practices with transportation issues concerning Highway 47.

**OBJECTIVE 6C**      Coordinate with ODOT on all land use decisions impacting Highway 47.



# ENERGY CONSERVATION

## STATEWIDE PLANNING GOAL 13

Goal 13 encourages communities to look within existing urban neighborhoods for areas of potential redevelopment before looking to expand in order to “recycle and re-use vacant land.”

## FACTUAL BASE

As the city continues to expand, the demand for energy in building and transportation networks is expected to increase. Oregon Statewide Planning Goal 13 requires jurisdictions to manage and control the development of land and uses to maximize the conservation of all forms of energy, based on sound economic principles.

### HEATING SOURCES

Electricity, wood, other fuel types, and gas are the principal fuel types supplying the energy needs for Carlton.

### SOLAR ENERGY

Within the Carlton Municipal Code<sup>20</sup>, the Downtown (D) District Design Standards allows rooftop “small-scale renewable energy” in the form of mini-wind turbines, solar panels and similar features. These are granted the exception of being visible from the street, alley, pedestrian access way, or civic space.

### STREET TREES

Carlton maintains an Approved Street Tree guidance document which offers instructions for siting, planting, and caring for your tree. There is also a list of approved tree species that contains mature height, canopy spread, form, color, and flower information.





## **ELECTRIC VEHICLES**

The Carlton Municipal Code currently allows for Electric fueling stations within the Downtown District, subject to Site Review.

## **ENERGY EFFICIENCY**

Electricity service is provided by Portland General Electric (PGE). The Carlton Municipal Code governs the promotion of energy conservation and efficiency in development through site planning and landscaping in its General Development Standards.

# **GOALS, POLICIES, AND OBJECTIVES**

## **GOAL**

To conserve existing energy resources and develop alternative sources.

## **POLICIES AND OBJECTIVES**

### **POLICY 1**

**Encourage energy conservation and climate resiliency in new development through site planning, drought and fire-resistant landscaping, stormwater mitigation, and construction practices that take advantage of climatic conditions of light, heat, cooling, and ventilation.**

### **POLICY 2**

**Encourage land use patterns that locate various land use activities (residential, employment, recreation, education, etc.) within close proximity.**

### **OBJECTIVE 2A**

Promote mixed-use development and increased densities near activity centers and along major transportation routes.

### **POLICY 3**

**Plan and solicit support for renewable energy sources.**

### **OBJECTIVE 3A**

Promote the design and development of public facilities and housing developments to take advantage of solar energy and co-generation.

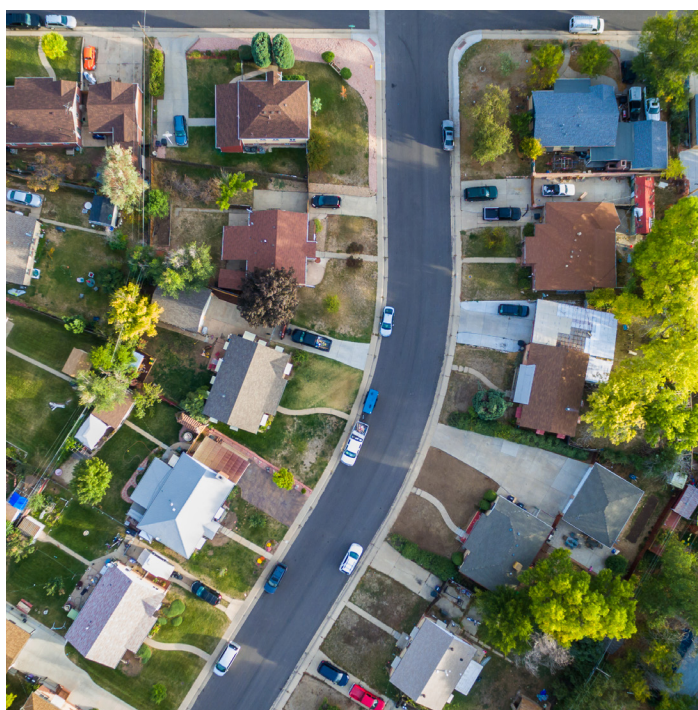




# URBANIZATION

## STATEWIDE PLANNING GOAL 14

Under Goal 14 all local governments must adopt an urban growth boundary in the comprehensive plan as a tool to contain urban development and plan for orderly growth.



## FACTUAL BASE

### URBAN GROWTH HISTORY

Carlton's city limits and urban growth boundary (UGB) have been identical since the time of the UGB adoption in 1978 and have not changed except for a simultaneous UGB and annexation action in 1985 to include Wennerberg Park. Over the years, the city has seen residential and commercial infill within the existing UGB.

### DEVELOPMENT TRENDS

Single family homes have consistently held the highest percentage of occupied housing units in Carlton, up until 2018, when the percentage dropped from 88.7% to 87%. 2000 to 2009 saw the highest percentage of housing development with 211 units built, with a substantial decrease in new units from 2010-2013 at only 83, and since 2014 only 26 new units have been built.<sup>21</sup>

# GOALS, POLICIES, AND OBJECTIVES

## GOAL

To provide for an orderly and efficient transition from rural to urban land use.

## POLICIES

- POLICY 1**      **Update and expand the urban growth boundary when conditions exist that satisfy adopted local and state standards for amendments to urban growth boundaries.**
  
- POLICY 2**      **Encourage the location of housing to minimize the consumption of prime agricultural land and other areas of natural resources that contribute to the community's rural character.**
  
- POLICY 3**      **Encourage infill development to utilize vacant parcels and achieve a more compact community.**
  
- POLICY 4**      **Use intergovernmental agreements with Yamhill County and other public agencies as needed to establish areas of mutual interest and coordination procedures relative to urban growth management.**





## Exhibit 2

### Comprehensive Plan Appendix: Inventories

#### CITIZEN INVOLVEMENT and LAND USE PLANNING

Carlton has an adopted Citizen Involvement Program to ensure that the citizens of the city have an opportunity to be involved in all phases of the planning process. Due in part to the size of the community, the Planning Commission is broadly representative of both the geographic areas and interests related to land use. The mayor and council select the commission members by an open and well-publicized process. For this reason, the City designated its Planning Commission as the Committee for Citizen Involvement (CCI) and LCDC accepted this designation.

The ultimate purpose of the Citizen Involvement Program is to establish effective communication and involvement between governing officials and the citizens of the community. It is intended specifically to promote awareness of this opportunity and to provide channels of communication so that the public may express their views to appointed and elected officials. It also provides means whereby citizens are guaranteed an open response to those views.

As the designated CCI, the Planning Commission has had the major responsibility for the overall development of the Comprehensive Plan and for the implementation of a citizen involvement program. Major methods of communication used by the CCI to solicit widespread citizen involvement in the planning process have been news releases and meeting notices in local newspapers; and person-to-person contact.

The availability of the Comprehensive Plan and supporting documents at City Hall will serve as a means of educating and informing the local citizenry about planned future actions and policies by the City of Carlton. This will enable and provide for continued citizen involvement in the future.

In the conduct of quasi-judicial land use hearings, the notice requirements, and hearings procedures of Oregon Revised Statutes, Chapter 197, as modified by legislative and judicial actions from time to time should be followed.

## NATURAL RESOURCES

### Topography

Carlton occupies the “highland” between Hawn Creek and the North Yamhill River both of which flow south approximately 6 miles to enter the main stem of the Yamhill River. The terrain within the Carlton planning area is generally flat. Elevations range from 120 feet along the North Yamhill River to 200 feet in the center of the City. Slopes of 0-5 percent occur over about three-fourths of the area. 5-15 percent slopes are found over approximately one-fifth of the area. The remainder of the City has slopes greater than 15 percent. These are predominantly found along the western fringe of the City and along Hawn Creek (Figure 1).

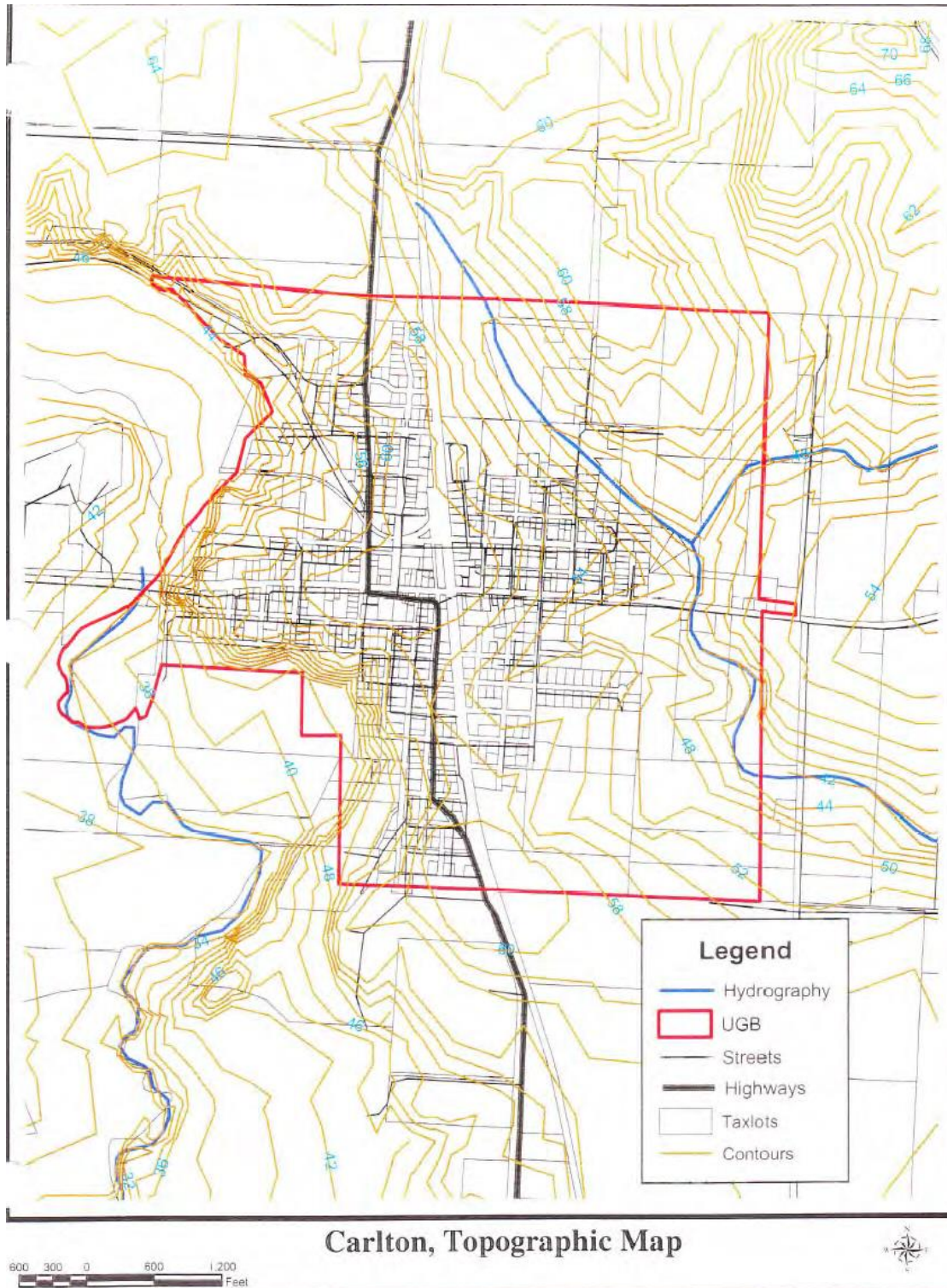
### Geology

Alluvial deposits of Willamette Silt predominantly characterize the Carlton planning area. This formation includes bedded silt and fine sand with occasional layers of clay, and lenses of pebbly fine to medium sand with locally scattered granite and quartzite cobbles. The formation is approximately 50 feet thick in the center of the valleys and thins toward the valley edges. Generally, the formation has a low permeability resulting in a slow transition to wells and springs.

Deposits of a more recent young alluvium are also present in the Carlton area. This includes silt, sand, clay and peat of present floodplains. The average thickness is 20 to 30 feet. The young alluvium formation contains poorly drained swampy areas having a permanently high water table. Young alluvium consists primarily of alternating layers of sand and gravel blanketed by flood plain silts.

Finally, a narrow band of Yamhill formation deposits stretches along the western section of the City. This formation consists of a complicated mix of shale and basalts of volcanic origins. It displays generally low permeability characteristics.

Figure 1. Carlton Topographic Map



## **Soils**

Through weathering and other processes that act on parent material, soil is formed, thereby providing man, animals and plants with life support requirements. The characteristics of the soil depend upon the parent material, climate, plants, animals, and time. Because many variables effect soil formation, soil types are numerous. Different soil types are, of course, suited for different uses. One soil may be highly suited for agriculture but, because of certain properties, it may be totally unsuitable as a building site. A soil may be flood-prone or susceptible to landslides, conditions that can be very costly or even impossible to overcome for building purposes, while posing only slight problems for agricultural uses. By determining the various properties of each soil, it is possible to determine for which use(s) each soil is best suited.

### **Agricultural Land Capability**

Class II soils have moderate limitations that restrict their use.

Class III soils have severe limitations that reduce the choice of plants, require special conservation practices, or both.

Class VI soils have very severe limitations that make them generally unsuited to cultivation and limit their use largely to pasture or range, woodland, or wildlife habitat.

There are no Class I, IV or V soils present in the Carlton area.

### **Building Site Limitations**

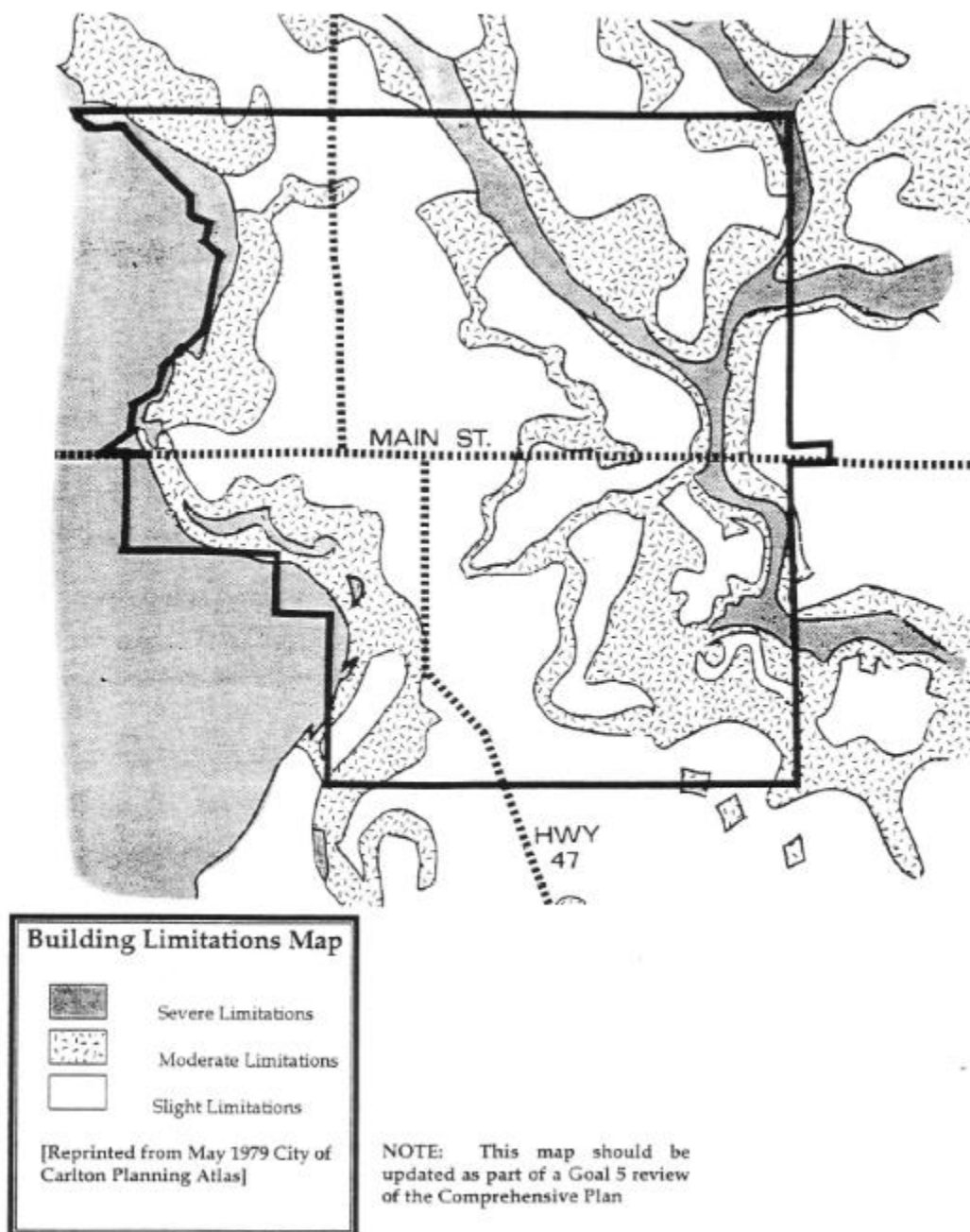
The ratings and limitations are for houses and other buildings that are not more than three stories high (Figure 2).

Soils that have slight limitations for use as building sites for residences have slopes of less than 12 percent, are well drained or moderately well drained, and are not subject to flooding. Hard rock is at a depth of more than 40 inches.

Soils that have moderate limitations for this use are somewhat poorly drained and are not subject to flooding. They have a seasonal high water table, fair stability, or moderate shrink-swell potential in the subsoil. They have slopes of 12 to 20 percent. Moderately rated soils have limitations that normally can be overcome with planning, careful design, and good management.



Figure 2. Building Limitations Map



Soils that have severe limitations for this use are poorly drained or are subject to flooding. They have poor stability, high shrink-swell potential, low shear strength, or high slide hazard. They have slopes of more than 20 percent. A severe rating indicates that the particular use of the soil

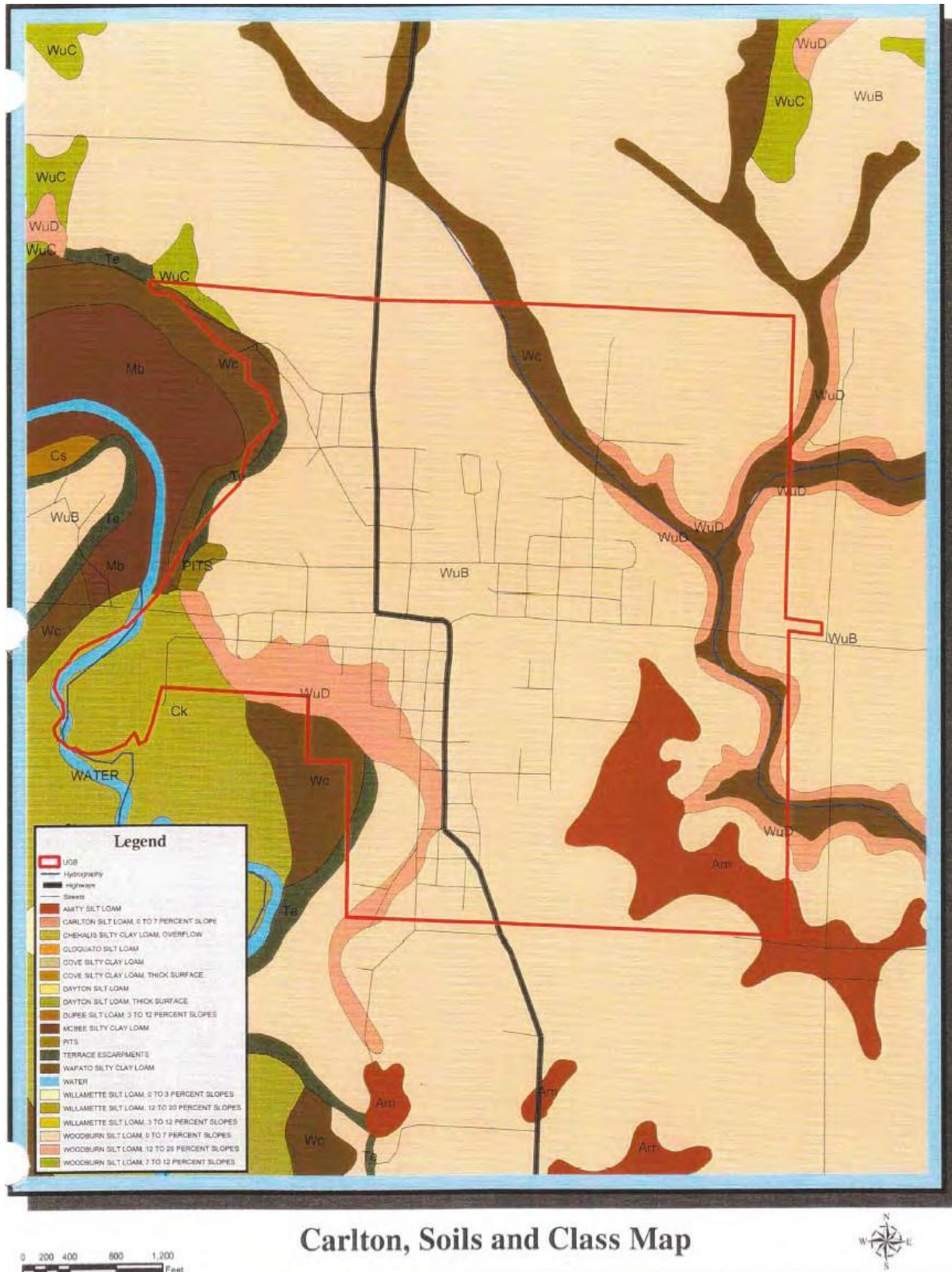
is doubtful and careful planning and above average design and management is required to overcome the soil limitations.

There are seven soil types in the Carlton planning area (Figure 3). The important properties and limitations of each soil type are listed in Table 1 to serve as a guide for determining building suitability on the basis of soil characteristics.

About 98% of the Carlton planning area is in Class II and III soils which are considered to be potentially suitable land for agricultural purposes. These lands are generally favorable for building sites, as is evidenced by the existing developments on these soils. The agricultural lands have been determined to be necessary for the future urbanization of the City beyond the year 2017. Until such times, as these lands are needed, agriculture could serve as an interim land use within the urban growth boundary.

Some of these soils have certain limitations for residential development; as is noted above. Applicants for building permits within areas rated as moderate or severe should be directed to the Soil Conservation Service of Yamhill County for additional information regarding soil management and land use.

Figure 3. Carlton Soils and Class Map



**Table 1. Carlton Soil Fact Sheet**

Soil Name	Agricultural Class	Building Site Limitations	Limiting Soil Characteristics	% of Carlton UGB Area	Existing Land Use
Woodburn Silt Loam <b>WuB</b>	Ilw	Slight	None	74%	Urban Use (60%) Agricultural & Vacant (40%)
Woodburn Silt Loam <b>WuD</b>	Ille	Moderate	Slopes	9%	Residential (20%) Agricultural & Vacant (80%)
Wapato Silty Clay Loam <b>Wc</b>	Illw	Severe	High water table; Flood hazard	7%	Urban Use (10%) Agricultural & Vacant (90%)
Amity Silt Loam <b>Am</b>	Ilw	Moderate	Somewhat poorly drained; seasonal high water table	5%	Urban Uses (20%) Agricultural & Vacant (80%)
Chehalis Silty Clay Loam <b>Ck</b>	Ilw	Severe	Flood hazard	2%	Agricultural & Vacant
Terrace Escarpments <b>Te</b>	Vle	Severe	High slide hazard Slope of 20-40 percent	2%	Vacant
Woodburn Silt Loam <b>WuC</b>	lie	Slight	None	1%	Agriculture

Sources: Soil Survey of Yamhill Area, Oregon

U.S. Department of Agriculture, Soil Conservation Service, January 1974.

### **Climate**<sup>1</sup>

The nearest measurement location for climatic factors is the North Willamette Experiment Station (Elevation, 198') located at Aurora. In summary:

#### **Temperature:**

Lowest Monthly Average: 32°F - January

Highest Monthly Average: 80°F - August

Driest Month: July

Wettest Month: December

<sup>1</sup> Source: Oregon Climate Service, 1996 Special Reports (Climate Data).

**Precipitation:**

Average Annual Precipitation: 40.780"

**Humidity:**

Average July Afternoon Humidity: 57 %

Average January Afternoon Humidity: 84 %

Precipitation averages between 40-45 inches a year with less than 2% in the form of sleet or snow. Approximately three-quarters of the precipitation fall from November through March. Dry periods of 60 to 90 days in the summer with no measurable precipitation occur frequently.

The monthly temperature mean is 52.1°F. Daily temperatures in January range from 31°F to 44°F, and in July they range from 48°F to 83°F. Humidity values are not available locally. However, for Portland, January's average is 81% and July's is 66%. There is an average growing season of 170 days based on the last occurrence in spring and first occurrence in fall of a temperature of 32°F.

**Agricultural Lands**

Agriculture is widely practiced in the Carlton planning area. Approximately 280 acres, percent of the City's land area, are devoted to agricultural uses. All 280 acres are SCS Agricultural Capability Class II or III soils. [See, Soils]

Farm crops grown in the planning area range from grains and seed grasses to fruits, wine grapes, and nuts. Grazing lands also make up a significant share of the agricultural activity in the area.

**Forest Lands**

There are no forestlands in the City of Carlton or its immediate environs. There are a few large clusters of fir and oak trees scattered around the planning area. Trees and brush line the Yamhill River that runs along the western edge of the City, as well as portions of Hawn Creek on the North and East.

**Open Spaces**

There are areas within the City of Carlton that are desirable to preserve as open spaces. The most notable of these are the agricultural and undeveloped lands surrounding the urban core. However, it should be noted that as a rural community, Carlton is surrounded by scenic farmland and open spaces that lend an overall pastoral setting to the City.



Two small creeks run through the northeast section of the City. These merge and flow out of the southeast corner of the City. The land adjacent to these creeks is primarily used for agriculture, open and wooded space. These areas provide ideal open space settings.

An area that is particularly suited for open space use is the vacant land in the northwest section of the City. This sloping area once overlooked Carlton Lake that also served as a wildlife refuge. The lake was drained in 1972, but the prospect of it being re-established makes this lakeside area a potential site for park development. Other existing uses, which provide open space in Carlton, include school grounds, and City Parks. Scenic views are offered by the number of historic structures in the Community and by the Coast Range Mountains to the west of the City.

### **Mineral and Aggregate Resources**

A study done by the Department of Geology and Mineral Industries in 1981 reported that there had been one quarry for sand and gravel in Carlton. The site was listed as inactive with no reserves of sand and gravel available. No other sources for minerals or aggregates are indicated by the report.

### **Energy Resources<sup>2</sup>**

The Carlton planning area has no identified reserves of fossil fuels such as petroleum, coal, or natural gas. Nor does it have sufficient water resources for hydroelectric generation.

With respect to energy use as a localized natural resource, there is little data available to identify the importance of local energy resources within the planning area. Solar energy is a feasible energy source in this area and is presently utilized in other parts of the County. The use of solar energy is growing rapidly, and within the near future it could be fairly common in the planning area.

The topography of some parts of the City lends itself very well to solar energy use. The area from W. Grant Street south to the city limits falls a total of 60 feet in a linear distance of 500 feet, or a south slope of about 12.7%. This area would be ideal for solar structures.

The area along the southwestern boundary of the City also has a slope of 12% or greater. Part of this slope extends to the west and part to the south. This area also offers ideal solar access.

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<sup>2</sup> Source: Yamhill County Energy Office

The rest of Carlton is also relatively well suited to solar structures. There are no steep north slopes that could cause excessive shadow patterns. The basic block pattern of the City is on a north-south grid so that any street running east-west should have good solar access.

Wind power, like solar, is a potential energy source in the County. However, this source of energy is very site specific and no data has been collected regarding its direct application in Carlton.

Wood burning for heating purposes is the most common form of localized energy presently being used.

### **Fish and Wildlife Resources**<sup>3</sup>

Fish habitats in the Carlton Planning Area are the North Yamhill River and Hawn Creek. The North Yamhill River is a large perennial stream with many long, deep pools interspersed with gravel bars. Hawn Creek often becomes intermittent along certain reaches by late summer. It is typically mud-bottom with limited areas of gravel for trout spawning. Channel alteration has occurred in the streams, resulting in a reduction in fish habitat.

Cold water game fish utilizing the North Yamhill River include: Coho salmon, winter steelhead trout, and cutthroat trout. The river serves as a migration route for these species and supports cutthroat trout throughout the year. Higher water temperatures during the summer preclude cold water game fish presence year round.

A small fishery occurs on the North Yamhill at Carlton for winter steelhead. Trout angling on the river takes place primarily in the spring.

Cutthroat trout from the North Yamhill River move into Hawn Creek during the fall and winter months. Small populations of cutthroat will remain in the stream throughout the year wherever sufficient flow is maintained.

Although not federally listed as “threatened or endangered,” winter steelhead and Willamette Valley cutthroat trout are each identified by ODFW as a “a stock of concern.” Owing to a variety of causes, winter steelhead numbers are down substantially throughout the Willamette basin and have recently been proposed for a state listing as “sensitive.” In regard to cutthroat trout, continued degradation and loss of stream habitat within the Willamette Valley, particularly within drainages along the eastern slope of the Coast Range, has led to a suspected decline in

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<sup>3</sup> Updated to reflect information provided city by ODOFW letter dated May 1, 1997.

overall cutthroat abundance. The North Yamhill River, Yamhill River, and Hawn Creek downstream from Hawn Creek Reservoir are Essential Salmonid Habitat.

Nongame fish species found in both streams include: dace, sculpin, stickleback, redbreasted sunfish, carp, largescale sucker, and squaw fish. In addition, Pacific lamprey and sand rollers are found in the North Yamhill River near Carlton. Pacific lamprey are listed by the state of Oregon as “sensitive” while sand roller have been classified as a “stock of concern” It is likely that both streams harbor several species of warm water game fish such as bluegill and bass.

Wildlife in the planning area consists primarily of small animals such as opossum, rabbits and muskrats, however, occasional sightings of other species including Red Fox have been reported. These generally inhabit the riparian edge of the river and creek but can also be found in areas where sufficient vegetative cover exists.

Numerous small birds and several game birds, such as pheasant, quail and Hungarian partridge inhabit the planning area plus occasional sightings of other species including Blue Heron. These are most commonly found in open space areas that offer some protective vegetation.

No threatened or endangered fish or wildlife species have been identified as living within the Carlton planning area at this time.

### **Wetland and Riparian Resources**

The 2024 Statewide Wetlands Inventory [SWI] Map depicts several areas of mapped wetlands along Hawn Creek tributary in the eastern portion of Carlton.<sup>4</sup> Additional areas of un-mapped wetlands along with important riparian areas likely exist along both the North Yamhill River and Hawn Creek. Riparian vegetation is important to protect fish and wildlife habitat and to promote stream bank stability. For fish, riparian vegetation provides shade cover, helps to regulate temperature, and provides food sources. A disproportionate number of wildlife species also use riparian vegetation during at least a portion of their life cycle.

The North Yamhill River is contained along the westerly border of the City and is buffered from development potential by a City Park and the wastewater treatment plant. The Hawn Creek Drainage is in an area of the City that is predominately undeveloped at this time.

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<sup>4</sup> Division of State Lands, National Wetlands Inventory Map 1994.

It is the responsibility of the city to notify the Division of State Lands [DSL] when certain development proposals occur on wetlands shown on SWI maps or, where developed, on a local wetland Inventory [LWI].

### **Water Resources**<sup>5</sup>

The City of Carlton is located on the North Fork of the Yamhill River. Bordered on the east by the Red Hills of Dundee and on the west by the Coast Range, Carlton lies on the level- to-rolling valley floor between. This "valley floor" provides a major drainage basin for several tributaries of the North Yamhill River. Among these, Panther Creek is the most important to Carlton. Approximately eight miles west of Carlton on Panther Creek, the City maintains a 23 million gallon (MG) impoundment reservoir with design criteria to meet expected population demands to the year 2017. Willamette Industries, a private timber company, and U.S. Bureau of Land Management (BLM) own the Panther Creek Watershed. Logging activities coupled with major storm events has increased siltation within the impoundment reservoir. A survey of the surrounding geologic formations reveals that there are no major water bearing aquifers upon which the City could rely for supply. Well logs of the area around Carlton indicate that yields of 5 to 15 gallons per minute (gpm) are the average with a few yielding as high as 35 gpm. The predominant geologic formations of this area are:

Young Alluvium – found mostly along waterways, consisting primarily of alternating layers of sand and gravel. It is generally too thin and of too low permeability to yield large quantities of water.

Willamette Silts – permeability generally quite low, resulting in slow transition to wells and springs. It may sustain domestic use but is too slow to sustain irrigation.

Yamhill Formation – a complicated mix of shale and basalts of volcanic origins. It has low permeability and low yields.

The North Yamhill River forms Carlton's western boundary and provides water recreational opportunities throughout the year. Canoeing, fishing, and swimming are a few of the activities local residents reportedly enjoy. River flows fluctuate markedly through the year with summer flows averaging 3.8 cubic feet per second (cfs). A record high of 9,530 cfs was posted during the

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<sup>5</sup> Updated to reflect results of a Study entitled: *City of Carlton, Panther Creek Watershed Protection*. Michael D. Henry. July 1997.

flood of 1955.<sup>6</sup> The Department of Fish and Wildlife has recommended that a minimum river flow of 10 cfs be maintained in the North Yamhill River to ensure protection of aquatic life. This flow is rarely achieved, however, as irrigation rights of record above Carlton amount to approximately 39.8 cfs.

The North Yamhill River, downstream of Carlton, is a “water quality limited stream” based on violations of state pH standards during low flows. This is an indicator of excess nuisance algal growth. Water bodies exhibit no major pollution problems; however, water quality is occasionally impaired by soil erosion, urban storm runoff, and seepage of chemical fertilizers and pesticides from nearby agricultural lands. The Oregon Department of Environmental Quality supervises water quality.

Carlton seems to be well situated in terms of water resources. Although the area lacks the necessary geologic formations to produce large groundwater supplies, surface water is plentiful and has been developed wisely. The impoundment on Panther Creek should provide an adequate municipal supply to the year 2017. The close proximity of the North Yamhill River provides excellent aquatic recreational opportunities. Care should be taken in all future planning to ensure the continued development and protection of these valuable assets.

The Federal Clean Water Act requires streams, rivers, lakes, and estuaries that appear on the 303(d) list be managed to meet State water quality standards. According to the 2022 EPA Approved Integrated Report, the North Yamhill River is impaired for the following parameters: flow modification, fecal coliform, dissolved oxygen, iron, and phosphorous. Hawn Creek (unassessed) is a tributary of the Yamhill River, which is impaired for the following parameters: fecal coliform, dissolved oxygen, temperature, iron, phosphorus, and methylmercury. The North Yamhill River, Yamhill River, and Hawn Creek downstream from Hawn Creek Reservoir are Essential Salmonid Habitat.

Carlton has been named as a Designated Management Agency (DMA) in the [2019 Willamette Mercury TMDL Implementation Plan](#) and assigned a 75% reduction from current levels of mercury in non-permitted urban stormwater. Significant portions of this load reduction must be achieved through changes in development practices. Specific requirements for DMAs can be found in the Water Quality Management Plan Table 13-11 and are outlined in the TMDL implementation plan.

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<sup>6</sup> North Yamhill River Station (1419700) at Pike, Lat. 452210, Long. 1231515, approximately 8.7 miles above the Carlton and Smith Bridge.



The DEQ definition of wastewater includes both point and non-point sources. Wastewater from a point source comes from a discernable or discrete conveyance such as a pipe, ditch, or channel. Non-point source wastewater is from overland flow, which does not generally follow a defined channel, and includes stormwater. Water pollution in the Carlton results from both point sources and non-point sources.

Reduction of open space, removal of vegetative cover, and development that increases the amount of impervious surfaces can contribute significantly to increases in the volume and peak flows of stormwater and decreases in water quality.

Offsetting measures can reduce the negative effects of urban development on water quality and quantity. Examples include reduction of stormwater runoff or maximization of infiltration, inclusion of landscaped buffer strips adjacent to new development, protection of floodplains, preservation and improvement of streamside vegetation along watercourses and in wetlands, and other development best management practices (BMPs).

### **Historic and Cultural Resources**<sup>7</sup>

Carlton had its earliest beginnings in 1844 when Peter Smith and his family settled on their land claim where the town of Carlton is now located. Over time the Smith farm became the site of the Methodist Episcopal Church and the Smith Church School.

In 1872, the Oregon Central Railroad completed construction of a rail line from Portland to St. Joe through this area. Mr. Wilson Carl, a resident of the area, persuaded the railroad company to make a flag stop in the little settlement. By about 1874 a station was built and the settlement became a regular train stop. Because of his efforts, the stop was at first designated as Carl's Town and later shortened to Carlton.

Once the rail stop had been established, the village of Carlton began to experience steady growth. Its first post office and general store were set up in 1874. In about 1875 Carlton School District No. 11 was formed and the first school was held in the Smith Church school building until the district could build its own schoolhouse. The district school was rebuilt or enlarged several times until construction of the present school in the 1950's.

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<sup>7</sup> Source: *Old Yamhill: The Early History of its Towns and Cities*, Yamhill County Historical Society, 1976.

The town of Carlton formally incorporated in 1899. A mayor and city council were elected at that time. This was followed by enactment of ordinances for the protection of the citizens and the municipal concern for the improvement of city streets.

In 1904, a local businessman became interested in the lumber business and built a dam across the North Yamhill River to form the Carlton Lake for log storage. The first mill was built in 1906. To further these logging operations, the Carlton and Coast railroad was constructed to bring logs from the mountains to the mill. The ensuing expansion of the local logging industry brought prosperity to the City.

For many years, the state of Carlton's economy was to be dictated by the logging and mill industries. This period saw more businesses open in the area and two large hotels built. Carlton's first City Hall was built in 1913. Following destruction of the local saw mill by fire in 1914, the City's business community experienced a period of recession.

The city of Carlton continued to experience periods of "boom" and "bust". These cycles were associated with events connected to the logging industry. Major forest fires in 1933 and 1939 threatened to severely cripple the City's principle logging operations. Later fires destroyed mills in Carlton. They were rebuilt, but currently (2000) there are no longer any lumber mills in Carlton and there place has been taken by a new and thriving winery industry.

Reminders of Carlton's historic past are still evident in the community today.

- The Carlton State Bank and Savings building located on the northwest corner of Main and Pine is listed on the National Register of Historic Places.
- The property known as Westerlook Farm (the Charles Ladd Estate) built in 1912 is contiguous to the city limits. It is listed on the Statewide Inventory of Historic Sites and Buildings.
- Local historians agree that the wooden barn located on the southwest corner of Park and Taft is the oldest structure in Carlton proper. It was on the farm of John Wennerberg, an early benefactor to the town of Carlton.

### **Air Resources**<sup>8</sup>

To protect the health and public welfare from known adverse effects of air pollution have adopted air quality standards, the Federal and State Governments. There are two divisions within

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<sup>8</sup> Source: Oregon Department of Environmental Quality, 1978.

the standards, primary and secondary. The primary standards are to protect the public health and the secondary standards are to protect the public from effects such as visibility reduction, soiling, nuisance and other forms of damage. McMinnville has the nearest air monitoring station and its air quality is well within the Federal and State standards. It can be safely assumed that the air quality of Carlton is also well within Federal and State standards.

Due to topographic and meteorological conditions, this area, as well as the entire Willamette Valley, experiences temperature inversions. Basically, inversions prevent the rising of air currents, thus trapping them near the ground; and by preventing airborne materials from escaping, cause air pollution. Without careful observation and monitoring of air pollutant sources in this area, there is a potential for serious short-term pollutant problems to occur.

During certain periods of the year local agricultural activity, particularly open field burning and tilling, generates suspended particulate matter, which, for a period of time can reduce visibility and be quite irritating. It also can be hazardous to people suffering from respiratory illnesses. Overall, though, the local agricultural pollutant contribution is rather insignificant.

Industrial activity has the potential of creating localized air pollution problems. However, air pollution problems due to industrial activity in the Carlton area have been historically low. One activity in the planning area that monitors source emissions for the Department of Environmental Quality is Madsen Grain Company, located within the City.

### **Noise Inventory**

Within the Carlton Planning Area, significant noise pollutants do not exist. State Highway 47 has the highest potential for providing noise pollution; however, the normal traffic noise generated by motorists has not provided major problems for residents of the City. A good portion of the highway is surrounded by commercial use that is generally not as sensitive to noise levels as residences. In addition, traffic volumes are generally light during the evening hours.

## NATURAL HAZARDS

The 2020 *City of Carlton Addendum to the Yamhill County Multi-Jurisdictional Hazard Mitigation Plan (NHMP)* to promote public policy and mitigation activities which will enhance the safety to life and property from natural hazards. The Addendum assessed Carlton's risk to six natural hazards that may occur in the city.

### **Drought**

The City's primary water source is from Panther Creek Reservoir and Panther Creek. The City also has a water right permit for a potential source on Fall Creek and from the Willamette River via the Yamhill Regional Water Authority (although infrastructure is not yet developed to access this source).

State-wide droughts have historically occurred in Oregon, and as it is a region-wide phenomenon, all residents are equally at risk. Structural damage from drought is not expected; rather the risks apply to humans and resources. Industries important to Carlton's local economy such as agriculture and timber have historically been affected, and any future droughts would have tangible economic and potentially human impacts.

### **Earthquake**

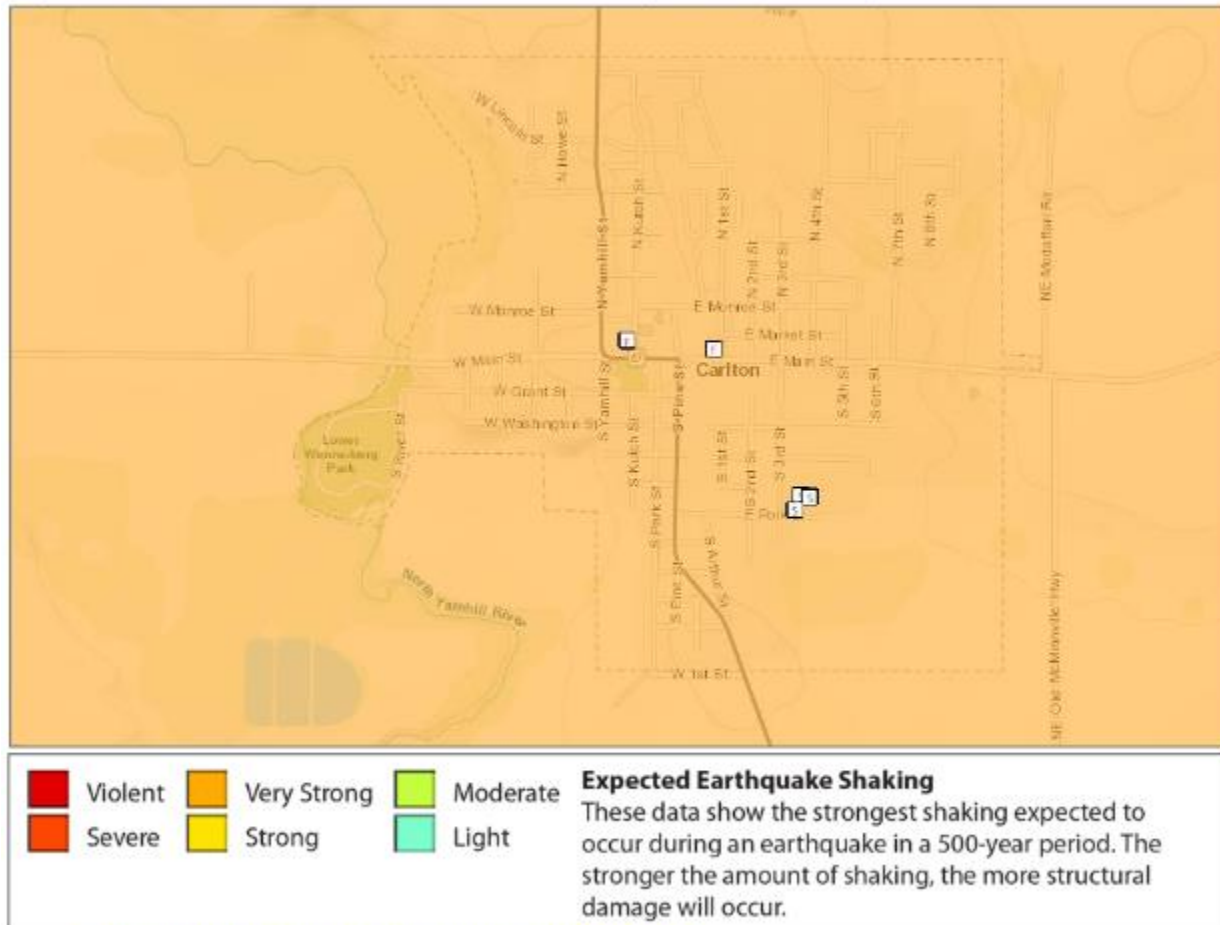
Social and geological records show that Oregon has a history of seismic events. Oregon has experienced damaging earthquakes in the historical past, and geologic evidence indicates that because of the city's increasing population and development, Oregon may expect earthquakes with even greater damage potential to occur in the future. South of McMinnville, near Dayton, there is a series of inferred faults (faults that extend underground from a visible fault) and concealed faults (completely underground faults). With its location in the Pacific Northwest, Yamhill County is susceptible to both intraplate and subduction zone earthquakes.

Within the Northern Willamette Valley that includes Yamhill County, two potential faults and/or zones can generate high-magnitude earthquakes. These include the Cascadia Subduction Zone and the Gales Creek-Newberg-Mt. Angel Structural Zone (including the Newberg Fault).

### **Cascadia Subduction Zone**

Figure 4 displays relative shaking hazards from a Cascadia Subduction Zone earthquake event. As shown in the figure, the City is expected to experience very strong (orange) shaking in a CSZ event.

**Figure 4. Cascadia Subduction Zone Expected Shaking**



Source: [Oregon HazVu: Statewide Geohazards Viewer \(DOGAMI\)](#)

The city’s proximity to the Cascadia Subduction Zone, potential slope instability, and the prevalence of certain soils subject to liquefaction, and amplification combine to give the city a high-risk profile. Due to the expected pattern of damage resulting from a CSZ event, the Oregon Resilience Plan divides the State into four distinct zones, and places Carlton within the “Valley Zone” (Valley Zone, from the summit of the Coast Range to the summit of the Cascades). Within the Northwest Oregon region, damage, and shaking is expected to be strong, and widespread - an event will be disruptive to daily life, and commerce, and the main priority is expected to be restoring services to business, and residents.

Crustal



Generally, an event that affects the County is likely to affect Carlton as well. Figure 5 shows a generalized geologic map of the Carlton area that includes the areas for potential regional active faults, earthquake history (1971-2008), and soft soils (liquefaction) hazard. The figure shows the areas of greatest concern within the City limits as red (high liquefaction hazard). The inset map shows the county including the Newberg Fault and hazard history.

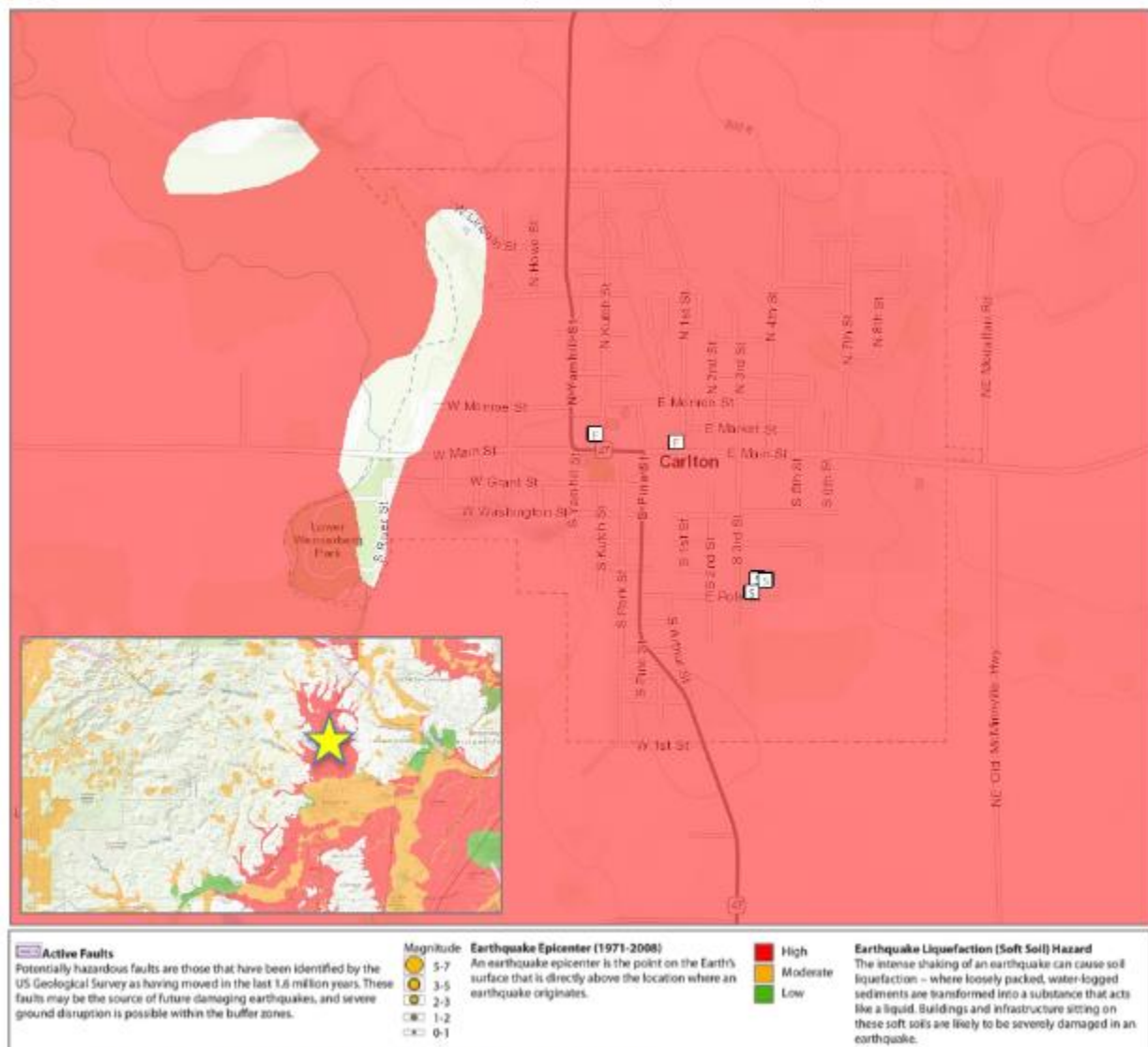
The western portion of Yamhill County is likely to experience higher levels of shaking than the eastern portion, as a result of its proximity to the Cascadia Subduction Zone. The City of Carlton is in the north-central portion of Yamhill County, in a region likely to experience strong shaking should a subduction zone or significant crustal earthquake occur. The city is also in an area prone to liquefaction (soft soils) during either a subductions zone or crustal earthquake event. Carlton is located more distant from crustal earthquake faults (the closest is the Newberg fault approximately 10 miles to the east) and has not experienced a damaging earthquake.

Ground movement is likely to cause damage to weak, unreinforced masonry buildings, and to induce small landslides along unstable slopes. As well as landslide, earthquakes can trigger other hazards such as dam failure and disruption of transportation and utility systems.

Panther Creek Reservoir and the city's water mains are vulnerable to seismic activity. There has been some erosion caused by tree removal activities by local landowners during the rainy season. There is a main 4.5 mile, 10-inch diameter transmission line to the city, and includes a 6-inch emergency connection to the McMinnville Water and Light main transmission line.

Utility systems will be significantly damaged, including damaged buildings, and damage to utility infrastructure, including water treatment plants, and equipment at high voltage substations (especially 230 kV or higher which are more vulnerable than lower voltage substations). Buried pipe systems will suffer extensive damage with approximately one break per mile in soft soil areas. There would be a much lower rate of pipe breaks in other areas.

**Figure 5. Active Crustal Faults, Epicenters (1981-2008) and Soft Soils**



Source: [Oregon HazVu: Statewide Geohazards Viewer \(DOGAMI\)](#)

Restoration of utility services will require substantial mutual aid from utilities outside of the affected area. Transportation systems (bridges, pipelines) are also likely to experience significant damage. There is a low probability that a major earthquake will result in failure of upstream dams.

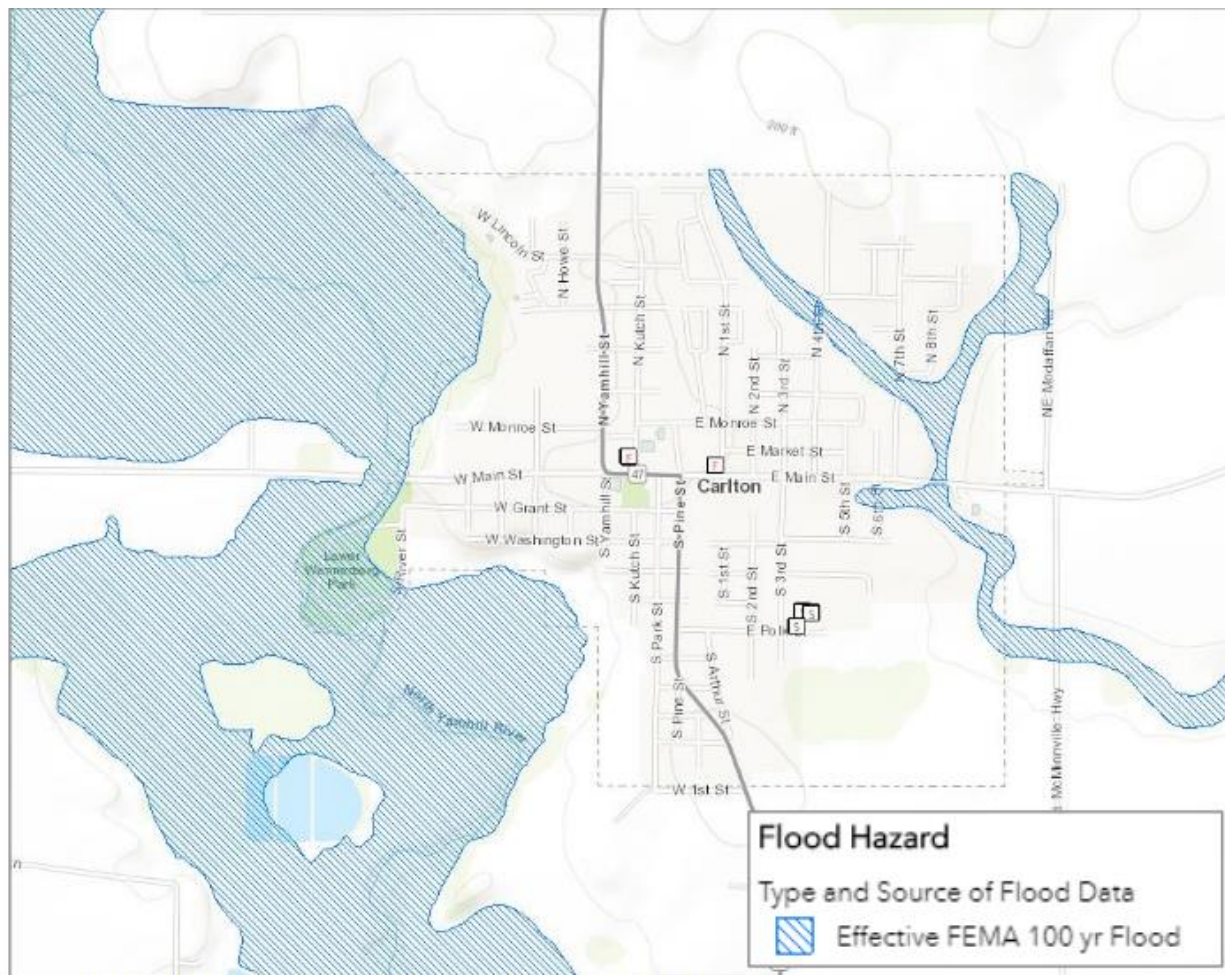
Approximately 59% of residential buildings were built prior to 1990, which increases the city's vulnerability to the earthquake hazard. Information on specific public buildings' (schools and public safety) estimated seismic resistance, determined by DOGAMI in 2007. Of the facilities evaluated by DOGAMI using their Rapid Visual Survey (RVS), none have a very high (100% chance)

collapse potential, three buildings, two at Carlton Elementary School and the Carlton Fire Station, have a high (greater than 10% chance) collapse potential.

**Flood**

Portions of Carlton have areas of floodplains (special flood hazard areas, SFHA). These include areas include the North Yamhill River along the city’s west boundary and the Hawn Creek in the northeast section of the city, as shown in Figure 6.

**Figure 6. Special Flood Hazard Areas**



Source: [Oregon HazVu: Statewide Geohazards Viewer \(DOGAMI\)](#)

For mitigation planning purposes, it is important to recognize that flood risk for a community is not limited only to areas of mapped floodplains. Other portions of Carlton outside of the mapped floodplains may also be at relatively high risk from over bank flooding from streams too small to be mapped by FEMA or from local storm water drainage.

Floods can have a devastating impact on almost every aspect of the community, including private property damage, public infrastructure damage, and economic loss from business interruption. It is important for the City to be aware of flooding impacts and assess its level of risk. The City has been proactive in mitigating flood hazards by purchasing floodplain property.

FEMA FIRMs were used to outline the 100-year and 500-year floodplains for the City of Carlton. The 100-year floodplain delineates an area of high risk, while the 500-year floodplain delineates an area of moderate risk. Most special flood hazard areas are within agricultural or open space use. Commercial development is generally located in the center of Carlton and is outside the special flood hazard area. The city's sewage lagoons are in an area susceptible to flooding from the North Yamhill River. A few residential properties to the east are susceptible to flooding of under one-foot flooding from Hawn Creek. Additionally, the city's water supply at Panther Creek Reservoir is within a special flood hazard area.

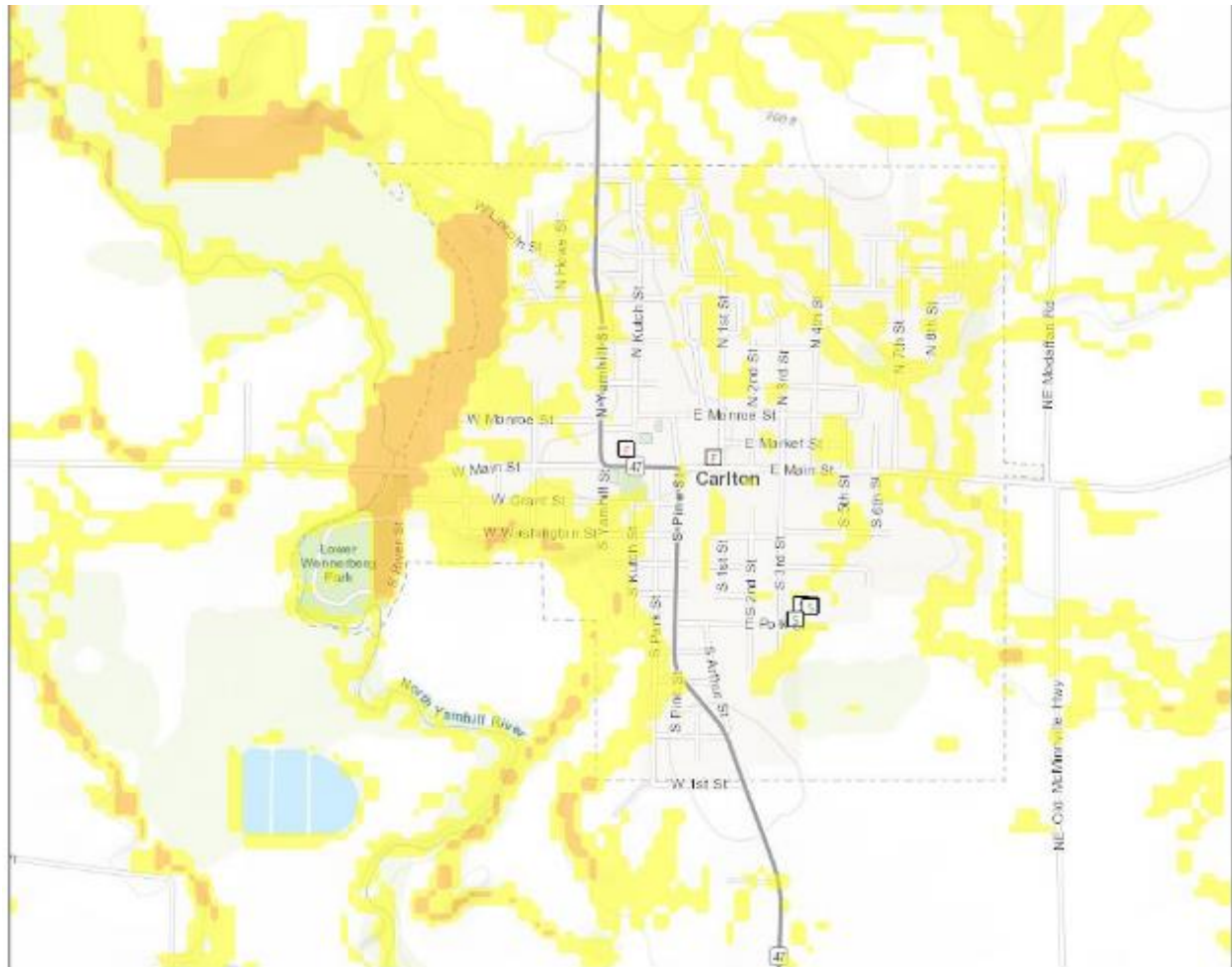
### **Landslide**

Landslide susceptibility exposure for Carlton is shown in Figure 7. Approximately 5% of Carlton has very high or high, and approximately 33% moderate, landslide susceptibility exposure. Within the city, areas of higher landslide risk tend to be located adjacent to the North Yamhill River and Hawn Creek and indicate erosion potential. In general, the areas of greater risk are located outside of the city to the west. Note that even if a jurisdiction has a high percentage of area in a high or very high landslide exposure susceptibility zone, this does not mean there is a high risk, because risk is the intersection of hazard, and assets.

Rain-induced landslides, and debris flows can potentially occur during any winter, and thoroughfares beyond city limits are susceptible to obstruction as well. The most common type of landslides are slides caused by erosion. Slides move in contact with the underlying surface, are generally slow moving, and can be deep. Rainfall-initiated landslides tend to be smaller; while earthquake induced landslides may be quite large. All soil types can be affected by natural landslide triggering conditions.



**Figure 7. Landslide Susceptibility Exposure**



Low	Landsliding unlikely. Areas classified as Landslide Density = Low (less than 7%) and areas classified as Slopes Prone to Landsliding = Low.
Moderate	Landsliding possible. Areas classified as Landslide Density = Low to Moderate (less than 17%) and areas classified as Slopes Prone to Landsliding = Moderate OR areas classified as Landslide Density = Moderate (7%-17%) and areas classified as Slopes Prone to Landsliding = Low.
High	Landsliding likely. Areas classified as Landslide Density = High (greater than 17%) and areas classified as Slopes Prone to Landsliding = Low and Moderate OR areas classified as Landslide Density = Low and Moderate (less than 17%) and areas classified as Slopes Prone to Landsliding = High.
Very High	Existing landslides Landslide Density and Slopes Prone to Landsliding data were not considered in this category. Note: the quality of landslide inventory (existing landslides) mapping varies across the state.

Source: [Oregon HazVu: Statewide Geohazards Viewer \(DOGAMI\)](#)

**Severe Weather**

Severe weather can account for a variety of intense, and potentially damaging hazard events. These events include windstorms and winter storms. Because windstorms typically occur during



winter months, they are sometimes accompanied by flooding and winter storms (ice, freezing rain, and very rarely, snow). Other severe weather events that may accompany windstorms, including thunderstorms, hail, lightning strikes, and tornadoes are generally negligible for Carlton. The impacts caused by windstorms, including power outages, downed trees, heavy precipitation, building damages, and storm-related debris.

Severe winter storms can consist of rain, freezing rain, ice, snow, cold temperatures, and wind. They originate from troughs of low pressure offshore that ride along the jet stream during fall, winter, and early spring months. Severe winter storms affecting the city typically originate in the Gulf of Alaska or in the central Pacific Ocean. These storms are most common from November through March.

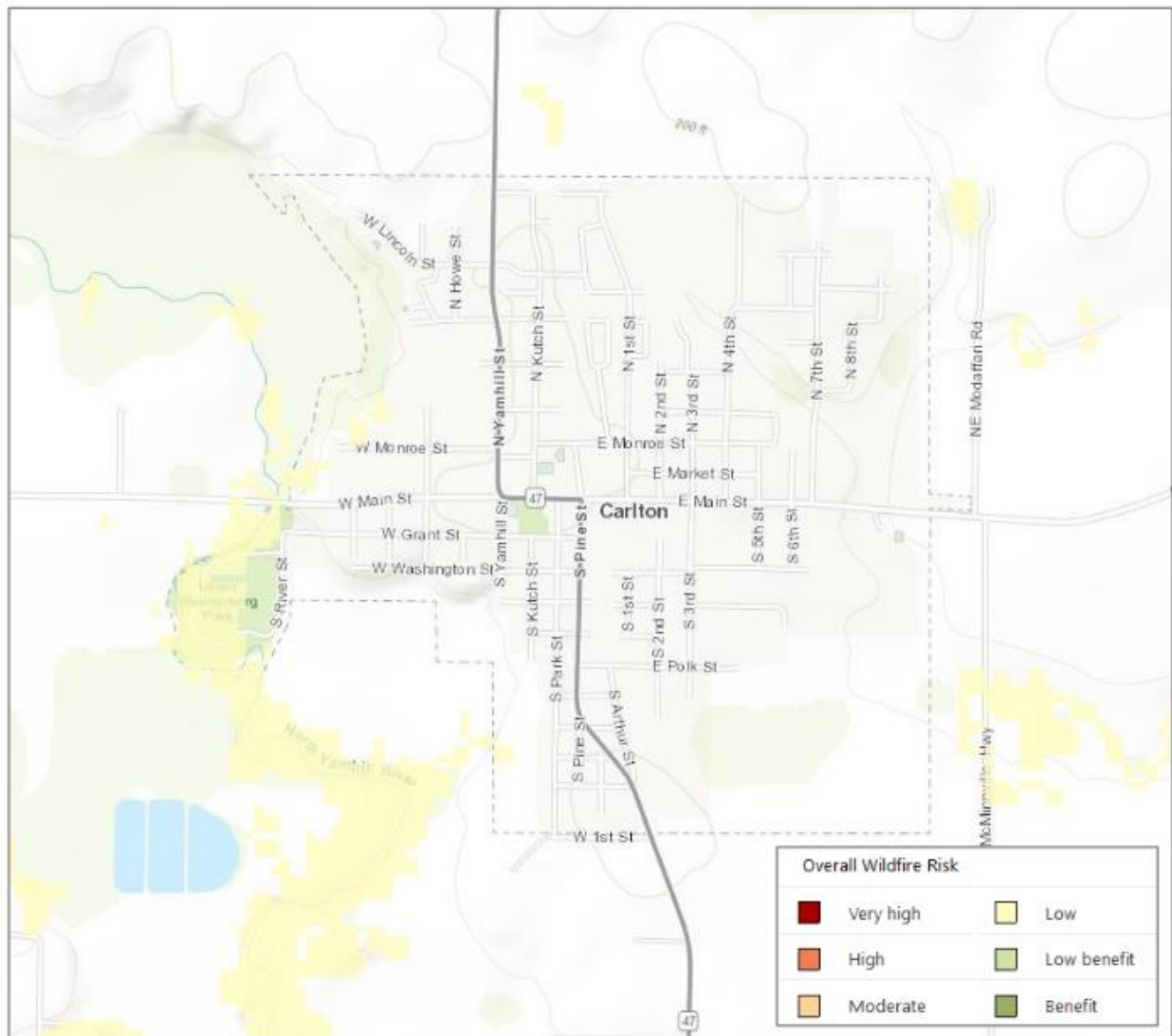
### **Volcanic Event**

Generally, an event that affects the eastern portion of Yamhill County is likely to affect Carlton. Several volcanoes are located near Carlton, the closest of which are Mount Hood, Mount Adams, Mount Saint Helens, Mount Rainier, and the Three Sisters. Due to Carlton's relative distance from volcanoes, the city is unlikely to experience the immediate effects that eruptions have on surrounding areas (i.e., mud and debris flows or lahars). Although the City of Carlton is unlikely to experience lahars or lava flows, tephra (sand- sized or finer particles of volcanic rock that is ejected rapidly into the air from volcanic vents) drifts downwind from the explosions and can form a blanket-like deposit of ash. The eruption of Mount St. Helens in 1980, for example, coated the Willamette Valley with a fine layer of ash. If Mount Hood erupts, however, the city could experience a heavier coating of ash. Tephra is a public health threat, and can damage agriculture and transportation systems. Tephra can also clog drainage systems and create major debris management problems. Within Carlton, public health would be a primary concern, and keeping transportation routes open/accessible would be important as well.

### **Wildfire**

The Yamhill County Community Wildfire Protection Plan (CWPP) was completed in August 2009 and revised in 2015. The location and extent of a wildland fire vary depending on fuel, topography, and weather conditions. Weather, and urbanization conditions are primarily at cause for the hazard level. Carlton has not experienced a wildfire within city limits. The city is surrounded by irrigated agricultural land. However, some wooded areas are a concern in the case of a wildfire event. Figure 8 shows overall wildfire risk in Carlton.

**Figure 8. Overall Wildfire Risk**



Source: [Oregon Wildfire Risk Explorer](#), date accessed April 29, 2020.

There have been no wildfires in the city, however, several small wildfires have occurred west of the city in the regions near the city’s water treatment plant and Panther Creek Reservoir. Wildland fires can be a problem in late summer to early fall and are usually caused by human activity (illegal brush burning, etc.)

The forested areas within and surrounding Carlton are interface areas. These areas outside of the city are characterized by varying housing structures (often large houses on small lots, some with shake roofs), natural, and ornamental vegetation, and topography that may increase the risk for wildfire spreading, particularly to the north and northeast.

Most of the city has less severe (low to none) wildfire burn probability that includes expected flame lengths less than four feet under normal weather conditions. However, conditions vary widely and with local topography, fuels, and local weather (including wind) conditions. Under warm, dry, windy, and drought conditions expect higher likelihood of fire starts, higher intensity, more ember activity, and a more difficult to control wildfire that will include more fire effects and impacts.

Carlton's fire response is provided by Carlton Fire District. The CWPP assesses wildfire risk, maps wildland urban interface areas, and includes actions to mitigate wildfire risk (all identified actions are outside the city limits). However, several identified projects are located near the city or within the city's watershed including moderate priority defensible space projects at the BPA and PGE substations located to the west of the city, and a high priority survey/defensible space project for the Panther Creek Area near the city's water reservoir. The City will update the wildfire risk assessment if the CWPP presents better data during future updates.

## **RECREATION**

Parks and Recreation is a division within the Carlton Public Works Department. The City manages three public parks within the city limits. Wennerberg Park offers a disc golf course in the lower section of the park. Additionally, the City operates the Carlton Pool during the warm weather months of the year. Other recreation facilities include picnic facilities, a basketball court, three baseball diamonds, playground equipment, and three picnic pavilions.

Developed in 2019, the Carlton Parks Development Plan prepares Carlton for population growth and an increase in residential development. The city has experienced only moderate growth in recent years, but several large residential subdivision projects planned for the community will result in a steady increase in population in coming years. The Parks Development Plan includes a Capital Improvement Program for park facilities.

The purpose of the Plan is to identify park and recreation amenities that will meet the needs of the community. The Plan serves as a guide for future development of parks within the community. More specifically, the purpose of the Plan is to identify current and future park and recreation needs, park and recreation goals and policies, propose parks and recreation facility improvements designed to meet future needs, identify general areas where new parks facilities could be developed, develop costs estimates for proposed parks and recreation facilities improvements, and identify reimbursement and improvement system development charge (SDC) requirements.

## ECONOMY

Statewide Planning Goal 9 (Economic Development) requires cities to provide an adequate supply of suitable sites for a variety of industrial and other employment uses. Carlton's economy has historically been based in the agricultural and forest industries. In the early 1900s, the area was identified as the state's "logging center". Over the years, Carlton has been home to several logging companies and the Carlton Manufacturing Company sawmill operations. Changes in the economy drove many lumber companies out of business and eventually led to the closure of the Carlton Manufacturing Company. Early agricultural activities were centered on hops, hay, pigs, and fruit and nut trees.

Traditional extractive industries continue to have a significant impact upon the local economy. Carlton is currently home to over nine wineries and a dozen horse farms. The city has also experienced recent growth in other industries such as the service, construction and trade, transportation and utilities sectors. Despite the recent diversification of the Carlton economy, the area continues to rely heavily upon McMinnville and other larger cities for the majority of its commercial and other service needs.

### **Summary of Economic Opportunities and Constraints**

Carlton has a number of economic advantages that will help foster additional economic development over the planning horizon. The city has a high quality of life and is supportive of local businesses and efforts to improve the city's downtown area. The city is located in close proximity to local wineries and a number of visitor support services have developed in the city recently such as wine tasting rooms, restaurants and retail stores that attract wine tourist in the region. As the wine industry and general population continue to grow in the Carlton area, there will be an increasing need for establishments that provide support goods and services to the wine industry and the general population.

A major limitation to new commercial and industrial development is the City's water system, which currently cannot provide adequate fire flows. This is a critical limitation to overcome in order to encourage economic development within the Carlton area. Future economic opportunity in Carlton is also constrained by its proximity to McMinnville and lack of major highway or Interstate access. Due to these constraints, it is unlikely that the City will be able to attract large scale manufacturing firms or become a retail service center for the larger area. However, as

Carlton's population continues to grow, there will be an increased demand for convenience shopping.

### **Future Planning Implications and Recommendations**

Economic trends and local comparative advantages support economic growth in the Carlton area over the next 20 years. While employment opportunities in the large-scale manufacturing sectors may be limited in Carlton, the City is in a prime location for attracting small scale manufacturers such as, wineries, and commercial visitor services, such as specialty retail shops, restaurants and lodging.

Total employment in Carlton is projected to reach 1,070 by 2027, an increase of 281 jobs from 2005. A review of the City's updated land inventory indicates the City has sufficient land of suitable sizes to accommodate projected commercial land needs. However, there is a shortage of approximately 10.8 acres of industrial land and a need to redesignate land for industrial purposes. Due to changing economic conditions over the planning horizon, the City should review the employment forecast and land inventory at least every five to ten years and make adjustments where necessary.

Additionally, in order for Carlton to reach its full economic potential, water system improvements are needed to enable new development to meet fire flow requirements. The City should also encourage further economic development by approving quality commercial and industrial developments, and supporting continued efforts to revitalize the downtown area to create a pedestrian friendly area that is inviting to visitors.

## **HOUSING**

The 2000 Census identified 588 residential dwelling units in Carlton. Of these, 498 units, or about 85 percent, were single-family residential units (including both "stick-built" units and manufactured homes). The remaining 90 residential units were multi-family dwellings. Of the 540 occupied housing units identified in the 2000 Census, 407 or approximately 75 percent were owner-occupied units and the remaining 133 units were rental units. The Census identified 38 vacant units within the community for an overall vacancy rate of approximately 6.3 percent.

The housing needs model shows that 160 rental units are currently needed in Carlton. The rental unit market is comprised of both multi-family residences (apartments, duplexes, etc.) as well as



single-family dwelling units. Census and building permit data shows that 90 multi-family units are currently located in Carlton. The 2000 Census showed that approximately 67 percent of all rental units were multi-family residences and the other 32 percent of all local rental units were single-family residences. Using this percentage, as many as 43 single-family residences are currently used as rental units. Combined with the 90 existing multi-family units, the estimated supply of rental units in Carlton consists of 133 units where 160 units are needed. The estimated supply of rental housing units in Carlton does not meet the current need for rental units. An additional 27 rental units, consisting of 18 additional multi-family units and nine single-family dwelling units are needed to meet the current housing needs.

The 2027 population projection for Carlton is 2,379 persons. 906 dwelling units will be needed in Carlton by 2027 to accommodate this population. Of the 233 new residential units, an estimated 57 new rental units will be needed, assuming approximately 24.6 percent of the local housing market is comprised of rental units, as was the case in 2000. The analysis of new rental units assumes that approximately 67 percent of the rental market is comprised of multi-family residences, with the remainder comprised of single-family units. Based on this assumption, approximately 39 new multi-family residences and 18 additional single-family dwellings will be needed to meet the projected need for rental units in 2027. In addition, the number of rental units currently available is about 27 units (18 multi-family and nine single-family dwelling units), which is short of meeting the existing need. Consequently, in order to meet existing and projected need for such housing, a total of 57 new multi-family units will be needed over the next 20 years in addition to 176 new single-family dwelling units.

## **PUBLIC FACILITIES**

### **Educational Services**

Educational services are provided by the Yamhill-Carlton School District, which operates the Yamhill Carlton Elementary School, Intermediate School, and High School. The Yamhill Educational Service District (ESD), with headquarters in McMinnville, provides some additional alternative education programs. The Elementary School is located in Carlton, while the Intermediate and High schools are located in Yamhill. Alliance Academy is an alternative school in the Yamhill-Carlton School District that serves students and parents who want a home setting for their education.

### **City Government**

Carlton was incorporated in 1899. The most current City Charter was adopted June 4, 1962. The Mayor, elected every two years, and six-member Council, elected to four-year terms, are the policy making body for the City. A seven member Planning Commission, appointed by the Council, serves as an advisory body to the Council and considers various land use applications. The current City Hall with administrative, public works and police officers was constructed in 1974. A new City Hall is currently under construction. Major functional areas of city government include fire protection, policing, water service, wastewater service, parks and swim pool, planning, and streets.

### **Fire Services**

The Carlton Fire Department provides fire protection services for the City of Carlton, and on a contract basis, the surrounding Carlton Rural Fire Protection District. The total district encompasses an area of approximately 30 square miles. The department is a volunteer organization consisting of a Fire Chief and about 25 fire fighters.

Fire flows are provided through approximately 51 hydrants within the city and a significant number along the City of Carlton's rural water system. Many of the hydrants are located on 4" lines, which could mean the water quantity may be problematic at those locations.

The fire department is experiencing no current problems in providing adequate fire protection services for the district. The present firehouse facilities are adequate to house equipment currently in service but not the design (size) of newer equipment. With the replacement of existing fire equipment as it becomes obsolete, a need will exist for new or expanded firehouse facilities.

### **Police Services**

Carlton's City Police Department consists of a Chief of Police, two (2) full time officer and six (6) reserve officers. Backup law enforcement services are available as required from the Yamhill County Sheriff's Department and the Oregon State Police. City officers are available to provide 24-hour service. The Primary Public Safety Answering Point (PSAP) serving Carlton residents with 9-1-1 answering and dispatch for the police, ambulance and fire services is provided through the Yamhill County Communications Agency (YCOM). Police service appears to be adequate at this time.

### **Streets**

With the exception of State Highway 47 and Main Street from Hawn Creek east, all street maintenance and lighting are the responsibility of the City of Carlton. This system amounts to approximately 8.83 miles of public rights-of-way, 7.34 miles paved and 1.49 aggregate surfaced. Sidewalk maintenance is the responsibility of the property owner.

### **Emergency Services**

The Yamhill County Emergency Services Advisory Committee administers the Yamhill County Ambulance Service Area Plan adopted on June 8, 1988. The plan allocates the Carlton area to the McMinnville Ambulance Service District. Working through the McMinnville Fire District Emergency medical response services are normally provided by EMT personnel and ambulances based at McMinnville Main Station, 175 E. 1st Street, a distance of approximately 7.25 miles from the City of Carlton. The approximate normal response time for 90% or more of the calls within the City of Carlton is 8 to 10 minutes.

### **Water Service**

#### **Water Supply System**

The 2014 Carlton Water Master Plan provides a comprehensive evaluation of the city's water system with respect to its existing and future needs, identify improvements and associated costs necessary to meet those needs, and provide the City with a framework for the provision of water service through the year 2033. The master plan provides the City with a guide for short term and long term water system improvements and has been prepared as a reference document to assist the City as it evaluates the impacts of proposed development and land use on the water system.

The master plan accomplishes the following specific objectives:

- Establishes water system design and planning criteria
- Provides an inventory of the existing water system infrastructure
- Identifies current and future water system deficiencies on a prioritized basis
- Provides specific recommendations to the community and City Council for action
- Provides the City with a water system master plan that addresses the needs of both the City and regulating agencies

#### **Existing Water System Inventory**

The City operates and maintains the existing water system and delivers water to its consumer base utilizing Panther Creek/Carlton Reservoir as a source, a water treatment plant, and a network of

distribution pipes. Under normal operating conditions fire protection is provided by the 1 MG steel finished water storage reservoir.

Based on City records, Carlton's original water system was constructed in about 1911. The initial infrastructure appears to have included a 30 foot long, 3 foot high concrete dam across Panther Creek just downstream of the current reservoir dam and a 9 mile long pipeline into town. The 0.38 MG concrete storage reservoir is believed to have been constructed in the early 1900s. Early records for water treatment are not available, but a system was in place prior to 1984 when the predecessor to the current water treatment plant was built. In 2003 the water treatment plant was expanded and upgraded and the 1 MG steel reservoir was constructed.

The City's water supply piping consists of three main elements: (1) the Treatment Plant Finished Water Line, (2) the Meadow Lake Transmission Main, and (3) the distribution mains in town. The Treatment Plant Finished Water Line is just over 7 miles long and contains 10-inch and 12-inch steel pipe. The Meadow Lake Transmission Main is about 1.8 miles long and is primarily 10-inch Cast Iron, with just over 1,400 feet of 16-inch ductile iron pipe at the 1 MG steel reservoir and crossing the North Yamhill River bridge. The distribution system contains nearly 12 miles of pipe, over half of which is 6-inches or smaller, while the remainder is 8-12 inches in size. About 1/3 of the existing pipe is cast iron, 1/4 is PVC, and 1/4 ductile iron, with much of the remaining of an unknown type.

The City currently has a supervisory control and data acquisition (SCADA) system (located at the WTP) that allows for centralized monitoring and control of the system by the system operators from a centralized location (for those system components connected to the SCADA system). The 1 MG steel reservoir is the only location other than the water treatment plant connected to the SCADA system, receiving control valve signals and sending flow meter data.

### Water Supply

Overall, the City is in comparatively good shape at this time with regards to water rights, but it has important work to do to strengthen its position by working towards certifying various currently permitted water rights. With regard to the availability and reliability of Carlton's water supply there are a couple of key concerns identified. These include the reliability of the Panther Creek/Carlton Reservoir water source and working towards a stronger position with respect to source redundancy.

The Panther Creek/Carlton Reservoir source serves the City well, but it is subject to at least two challenges that can reduce its reliability. One is the high sediment and silt loads that can occur in conjunction with major winter storms. The other is the occurrence of higher temperatures and algae blooms that are believed to be exacerbated by the significant silt accumulation in Carlton Reservoir. The algae blooms create biomass in the water which tends to foul the filters and reduce the time the filter can operate before a backwash is required.

Furthermore, the silt accumulation is believed to be extensive enough that the storage volume of the reservoir is likely reduced. The original storage volume is estimated to have been around 60 acre-feet. With a surface area of approximately 4 acres, an average depth of silt of only 3 feet would reduce the total volume by 12 acre feet, or approximately 20% of the reservoir volume.

### Water Treatment

The City operates a direct filtration water treatment plant located about 3/4 of a mile downstream of Carlton Reservoir. Because Carlton's water source is surface water a significant number of regulatory requirements govern the necessary treatment before the water is passed on to consumers. Because of the range of concerns there is no one-step process that is capable of meeting all of the requirements. Therefore, treatment consists of a series, or train of steps, each designed to address specific concerns.

Overall, the existing water treatment plant is performing well and has the capacity to provide the necessary treatment for projected demands throughout the study period. The estimated maximum day demand in 2033 is 0.642 MGD (446 gpm). The plant capacity has three main limiting factors, the filters, the chlorine contact time, and the downstream distribution system.

### Distribution System

The primary concern for Carlton's water distribution system is the lack of fire flow capacity. Lack of fire flow capacity is attributable to undersized pipes in the Meadow Lake Transmission Main and in the distribution main grid within the City Limits/UGB. Improvements to the transmission and distribution system will be required to meet projected demands or to address system reliability issues.

### Water Storage

In most municipal distribution systems, the water system service pressure is determined by the elevation of the free water surface in the storage reservoirs serving the system. This is the case



for Carlton's water distribution system. Based on these numbers the existing finished water storage reservoirs fully meet the recommended storage volumes until 2020, and by the end of the planning period the deficit is only 124,000 gallons or 10% of the recommended total volumes. It should be noted that the recommended volumes are quite conservative, thus a deficit of 10% is not a significant concern.

As such the City should anticipate planning for additional storage capacity later in the planning period, but no immediate action is necessary with regard to designing or constructing a new finished water storage facility. While new storage infrastructure is not viewed as necessary, there are maintenance items recommended for the existing storage reservoirs. The recommendations note that reducing leaks will effectively add storage capacity and thus extend the timeframe before additional storage capacity is needed.

### **Wastewater System**

The City of Carlton owns and operates its own wastewater collection, treatment and disposal system. Carlton's sewer system was originally constructed in 1911 and has been enlarged several times since then. The wastewater system currently consists of a gravity system; two pump stations, treatment plant, and river outfall. The system serves 670 single-family equivalent services, all within the incorporated city and urban growth boundary.

The collection system is a conventional gravity system with two pump stations. The system is made up of approximately 35,000 feet of pipe, which vary in size from 6-inch to 16-inch. Most of the collection system was constructed before 1960. Over 17,000 feet of the collection system was constructed in 1928. The lines constructed in 1928 are vitrified clay and concrete with concrete-mortar joints. The majority of the other pipes are concrete with bell and spigot joints. Only 1,700 feet of the collection system is asbestos cement pipe.

Carlton's wastewater system includes two pump stations. The Hawn Creek Pump Station serves all of Carlton east of the railroad right-of-way. This pump station underwent a major reconstruction in 1995. The other pump station is at the wastewater treatment plant. The wastewater treatment plant is a two-lagoon system constructed in 1995. Floating aerators were then added to increase the treatment capacity of the plant. Treated water is disinfected with chlorine and discharged to the North Yamhill River. To meet dilution requirements the City can only discharge during the months of November through April.

A total Mass Discharge Limit (TMDL) has been established for the North Yamhill River. Because of this, the City will have difficulty obtaining future mass load increases as the demand on the system increases. It is likely that the City will need to dispose of more effluent through irrigation.

### **Storm Drainage System**

According to the City of Carlton's *2002 Storm Drainage Master Plan*, the city rests atop a knoll whose ridges divide the city into four separate drainage patterns. Drainage from the western portions of Carlton flow to the northwest and southwest into the North Yamhill River. Drainage from the eastern portions of Carlton flow to the northeast and southeast into a tributary of Hawn Creek. The railroad right-of-way running through town roughly defines the east-west runoff and Monroe Street divides the north-south drainage.

The city's storm drainage systems are comprised of a series of roadside ditches or swales that often are discontinuous across individual properties. IN some areas, the swales contain storm water without allowing for the continuation of drainage across streets. Where passage exists, street culverts pass runoff through intersections into other ditch systems. In the downtown commercial district, a series of storm drain pipes and a catch basin collection system has been constructed. Newer storm drainage systems have been constructed in the last several years in the Webb Subdivision, clover Lawn Addition, Carlton Meadows, and the mobile home park.

Of major concern is the street runoff collected and discharged directly into watercourses. This places silts, oils, hazardous substances, and debris into them. The Endangered Species Act has made such discharge illegal for any creek that is deemed suitable for fish habitat and that is a tributary to the Willamette River.

The master plan includes a Capital Facilities Plan that identifies pipes needing upgrading and areas needing improvements. Storm drainage improvements are prioritized. High priority projects provide relief to areas that may become hazardous to traffic or pedestrians during flooding events or will relieve potential downstream flooding. Non-priority improvements provide service to areas that experience standing water where hazardous conditions are not as severe. Figure 9 shows a map of existing system elements and areas of suggested improvements, repair and/or replacement.

### **Energy Distribution System**

Portland General Electric provides Carlton's electric power. As of 2000 there was a 3% electric power franchise in the City of Carlton. PGE indicates that there are no problems with the

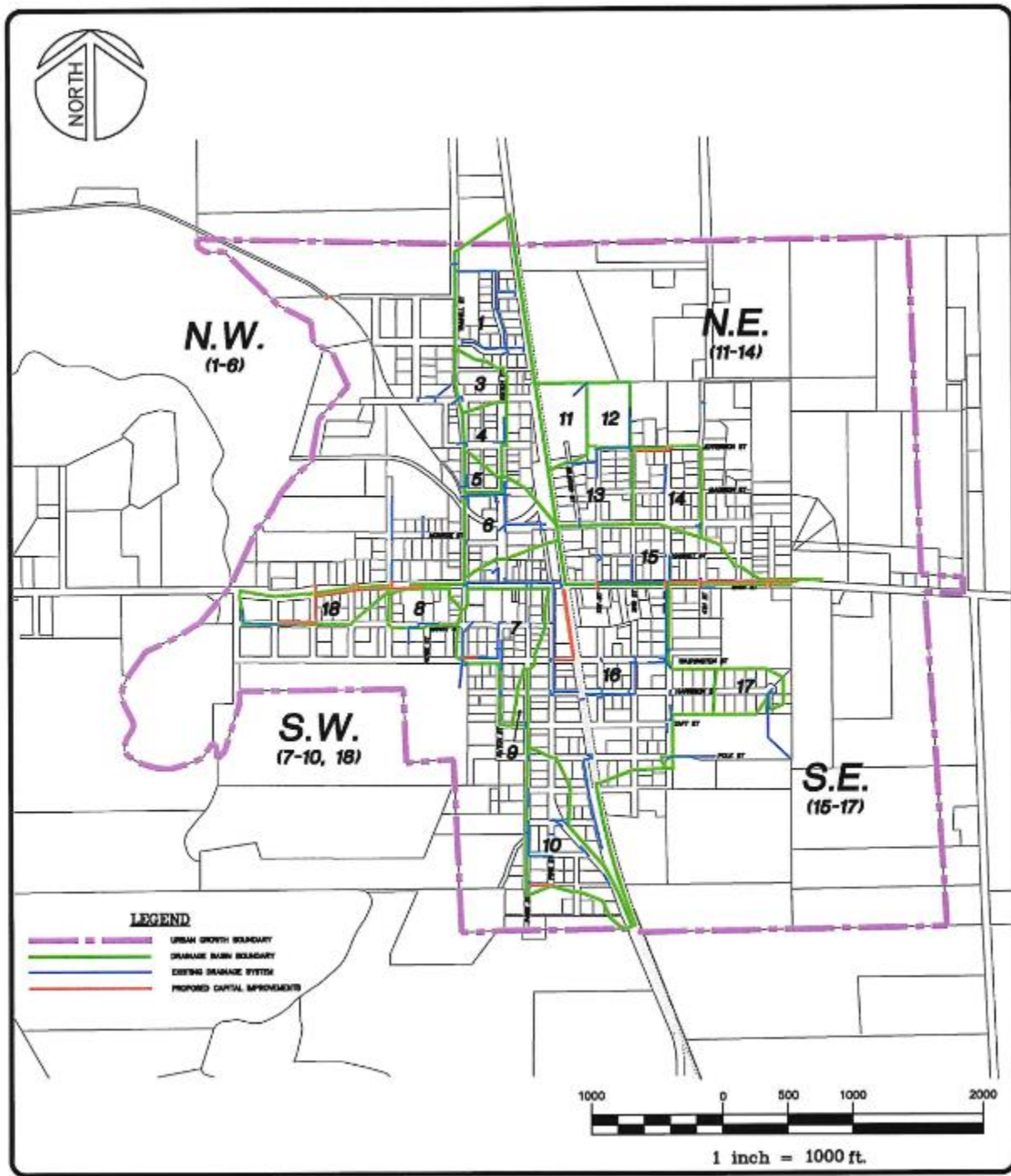
expansion of the system to meet expected growth trends. The City is not presently served by a natural gas distribution system.

### **Solid Waste Disposal**

City Sanitary and Recycling Services of McMinnville provide the solid waste and recycling service for Carlton and the immediate area.

Refuse is picked up weekly by truck and transported to the Riverbend Landfill site, three miles south of McMinnville. City Sanitary and Recycling Services contracts with the Riverbend Landfill Company for disposal.

Figure 9. Storm Drainage System and Proposed Capital Improvements



City Sanitary and Recycling Service provides residential curbside recycling once a month, on the same day as garbage service. It also provides a variety of commercial recycling services including high-grade paper and cardboard pickup. City Sanitary and Recycling service provides promotional and educational services. The material that is recovered includes three colors of glass, some plastics, tin/steel cans, aluminum, magazines, newspaper, cardboard, and used motor oil.

Recycled materials are brought to a processing center on the City Sanitary and Recycling Service Campus in McMinnville. The material is sorted and marketed. Bulk/large item recycling is also available to the residents of Carlton at the Riverbend Landfill, as well as direct drop off of solid waste, for a fee.

## **TRANSPORTATION**

Note: The City of Carlton is currently updating the Carlton Transportation System Plan (TSP). Upon adoption of the TSP, this section of the Comprehensive Plan Appendix will be updated in order to align the two documents.

The City of Carlton prepared and adopted an updated Transportation System Plan in May 2009. The TSP addresses the requirements of the Transportation Planning Rule (TPR), Statewide Goal 12, and key transportation issues identified by the City as part of the 2009 Transportation Plan Update. The Carlton TSP establishes the City's goals, policies and strategies for developing and improving the transportation system within the Carlton Urban Growth Boundary. The Carlton TSP serves as a twenty-year plan to guide transportation improvements and enhance overall mobility for vehicles, pedestrians and bicyclists throughout the city.

### **System Inventory**

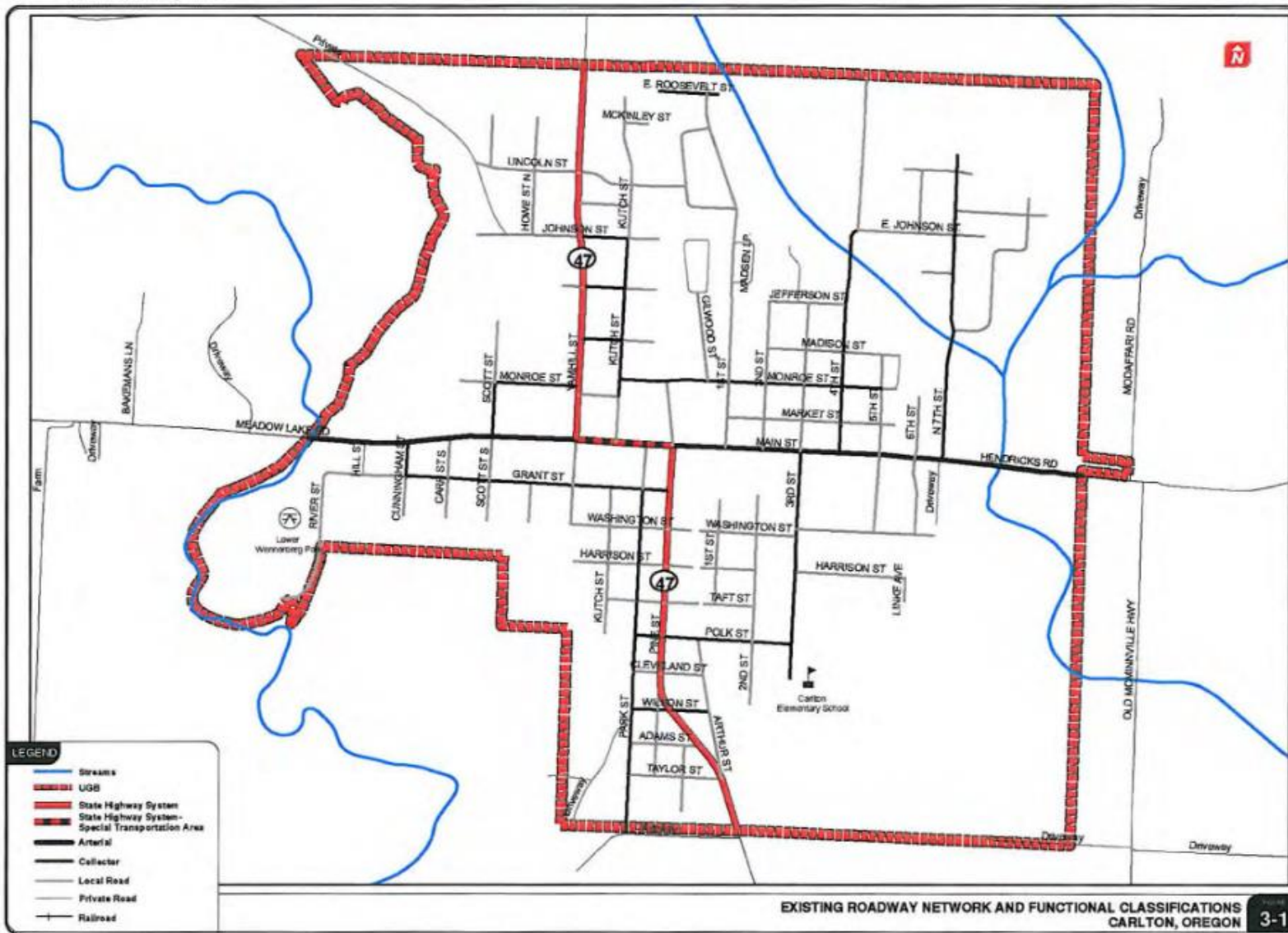
The transportation system inventory includes the street system as well as pedestrian, bikeway, public transportation, rail, air, water and pipeline systems. A copy of the updated street system inventory is available as an appendix in the 2009 TSP.

### **Roadway Functional Classifications**

The roadway functional classification system groups city streets into categories based on the character of service they are intended to provide, as shown in Figure 10. Identification of the appropriate roadway functions is the basis for planning roadway improvements and establishing appropriate standards (right-of-way, roadway width, design speed).



Figure 10. Roadway Functional Classifications



Carlton has three (3) types of roadway functional classifications that are described as follows:

- Arterials – Intra- and inter-community roadways connecting community centers with major facilities. In general, arterials serve both through traffic and local traffic. Access should be partially controlled with infrequent access to abutting properties.
- Collectors – Streets connecting residential neighborhoods with smaller community centers and facilities as well as access to the arterial system. Property access is generally a higher priority for collector arterials; through-traffic movements are served as a lower priority.
- Local Access Streets – Streets within residential neighborhoods connecting housing (also can be commercial, industrial, etc.) with the arterial system. Property access is the main priority; through-traffic movement is not encouraged.

The following arterials were identified:

- Highway 47
- Main Street

The following collectors were identified:

- Johnson Street from Yamhill Street to Kutch Street
- Johnson Street from 4th Street to 7th Street
- Jefferson Street from Yamhill Street to Kutch Street
- Madison Street from Yamhill Street to Kutch Street
- Monroe Street from Scott Street to 5th Street
- Cunningham Street from Grant Street to Main Street
- Scott Street from Main Street to Monroe Street
- Grant Street from Cunningham Street to Pine Street
- Kutch Street from Roosevelt Street to Main Street
- 1st Street from Roosevelt Street to Main Street
- 3rd Street from southern terminus to Main Street
- 4th Street from Main Street to Johnson Street
- 7th Street from Main Street to northern terminus
- Park Street from south city limits to Grant Street
- Polk Street from Park Street to 3rd Street
- Roosevelt Street from western terminus to 1st Street

- Wilson Street from Pine Street to Arthur Street

A summary of the current conditions and future deficiencies of the transportation modes serving Carlton is as follows:

### **Roadway Network**

- Intersection Operations: All of the unsignalized study intersections in Carlton currently operate acceptably and are forecast to continue to operate acceptably in 2030.
- Roadway Segment Operations: All of the Highway 47 roadway segments in Carlton currently operate acceptably and are forecast to continue to operate acceptably in 2030.
- Roadway Deficiencies: The following roadway deficiencies have been identified:
  - There are only four crossings of the Union Pacific railroad right-of-way that runs north and south within the city. This creates many east-west discontinuities in the otherwise continuous roadway network grid.
  - The following facilities were considered for upgrade from local street to collector classification based on the connectivity they provide and relationship to access and railroad right-of-way crossings:
    - 1st Street from Roosevelt Street to Main Street
    - Kutch Street from Johnson Street to Roosevelt Street
    - Kutch Street from Main Street to Monroe Street
    - Johnson Street from 4th Street to 7th Street
  - During peak hours, approximately one truck every 1.5 minutes pass through the downtown area of the City of Carlton along Main Street and create a negative impact to the downtown/community environment. Up to four times that many trucks pass through the Yamhill Street/Main Street intersection. Approximately seventy percent of the trucks on Main Street continue through town on Highway 47 and have the potential to be rerouted by a local by-pass.
  - Trucks have a difficult time negotiating the Yamhill Street/Main Street and Pine Street/Main Street intersections and encroach on both the approaches and departures of the intersections.
  - Highway 47 within the UGB has a crash rate slightly higher than the statewide average for similar facilities. This is a result of the relatively short study segment length. The crashes are primarily located at or near the two Main Street intersections along Highway 47 which have relatively low intersection crash rates.

- Crashes at the two Main Street intersections along Highway 47 are likely related to the unusual three-way stop-control. The three-way stop-control at the Yamhill Street/Main Street and Pine Street/Main Street intersections causes confusion to some motorists who mistake the intersections as all-way stop controlled.
- Left-turn lane warrants will be met at any intersection along N. Yamhill Street with a left-turn volume greater than ten vehicles in the peak hour. Left-turn lane warrants will be met at any intersection along S. Pine Street with a left-turn volume greater than approximately 20 vehicles during the peak hour.

### **Pedestrian Network**

- Existing Pedestrian Conditions: There are many sidewalk locations that are missing or deficient within the City of Carlton. Many of the existing sidewalks are in poor physical condition, too narrow, or poorly maintained with overgrown vegetation. The sidewalk system within the City is fragmented and disjointed and is difficult to use the sidewalks to safely walk from one area of town to another.
- Pedestrian Deficiencies: Sidewalks in good condition are desirable and should be provided on all collector, arterial, and local streets within the city limits; however, due to cost constraints a system of prioritization is necessary. Sidewalks shall be prioritized based on the necessity to provide Safe Routes to School and each roadway's importance in the roadway hierarchy. Priority sidewalk gaps, maintenance areas, and pedestrian crossings (in no particular order) include the following:
  - Safe Routes to School:
    - S 3rd Street between E Monroe Street and Carlton Elementary School
    - W Polk Street between S Pine Street and Carlton Elementary School
    - E. Monroe Street from N. Kutch Street to N. 3rd Street
    - N. Kutch Street from LE. Lincoln Street to E. Monroe Street
    - Pedestrian crossing along Highway 47 at Monroe Street
    - Railroad right-of-way crossing at E. Washington Street
    - Pedestrian crossing along Highway 47 at Washington Street
  - Other priority arterials/collectors:

- Main Street from N 7th Street to N 1st Street
- Railroad Right-of-Way Crossings to improve east-west connectivity throughout the City.
- N Yamhill Street from Main Street to Lincoln Street
- W Grant Street from S Pine Street to S River Street
- N 1st Street from E. Monroe Street to E. Main Street

### **Bicycle Network**

- Existing Bicycle Conditions: There are currently no designated bicycle facilities in Carlton.
- Bicycle Deficiencies: Bicycle lanes are desirable on all collector and arterial roadways; however, roadways with traffic volumes greater than 3,000 vehicles per day, those on Safe Routes to School, as well as those that create recreational opportunities should be the priority. Based on these criteria, the following prioritizes potential bicycle facilities:
  - Highway 47 within the city limits
  - Main Street within the city limits
  - Polk Street between S Pine Street and Carlton Elementary
  - 3rd Street between Main Street and Carlton Elementary School
  - Railroad right-of-way multi-use path

### **Public Transit Service**

- Existing Public Transportation: Several public transportation services are provided within the City of Carlton. Including:
  - LINKS – provides service via the Highway 47 Corridor LINK service which connects between Carlton and McMinnville, Yamhill, Cove, Gaston and Hillsboro (which connects with Metro’s MAX light-rail system).
  - 99W Corridor LINK – fixed route service connecting McMinnville, Lafayette, Dayton, Dundee, Newberg and Sherwood
  - YCTA Paratransit Service – dial-a-ride service to all residents with 24-hour advance notice.
- Future Transportation: Future transit needs in the City of Carlton could include expanded regional and intercity commuter services, expanded transit frequency during Carlton Fun Days



and peak wine tasting times, park-and-ride lots, as well as more widespread awareness of the existing Cherriots Rideshare carpool program.

### **Rail Service**

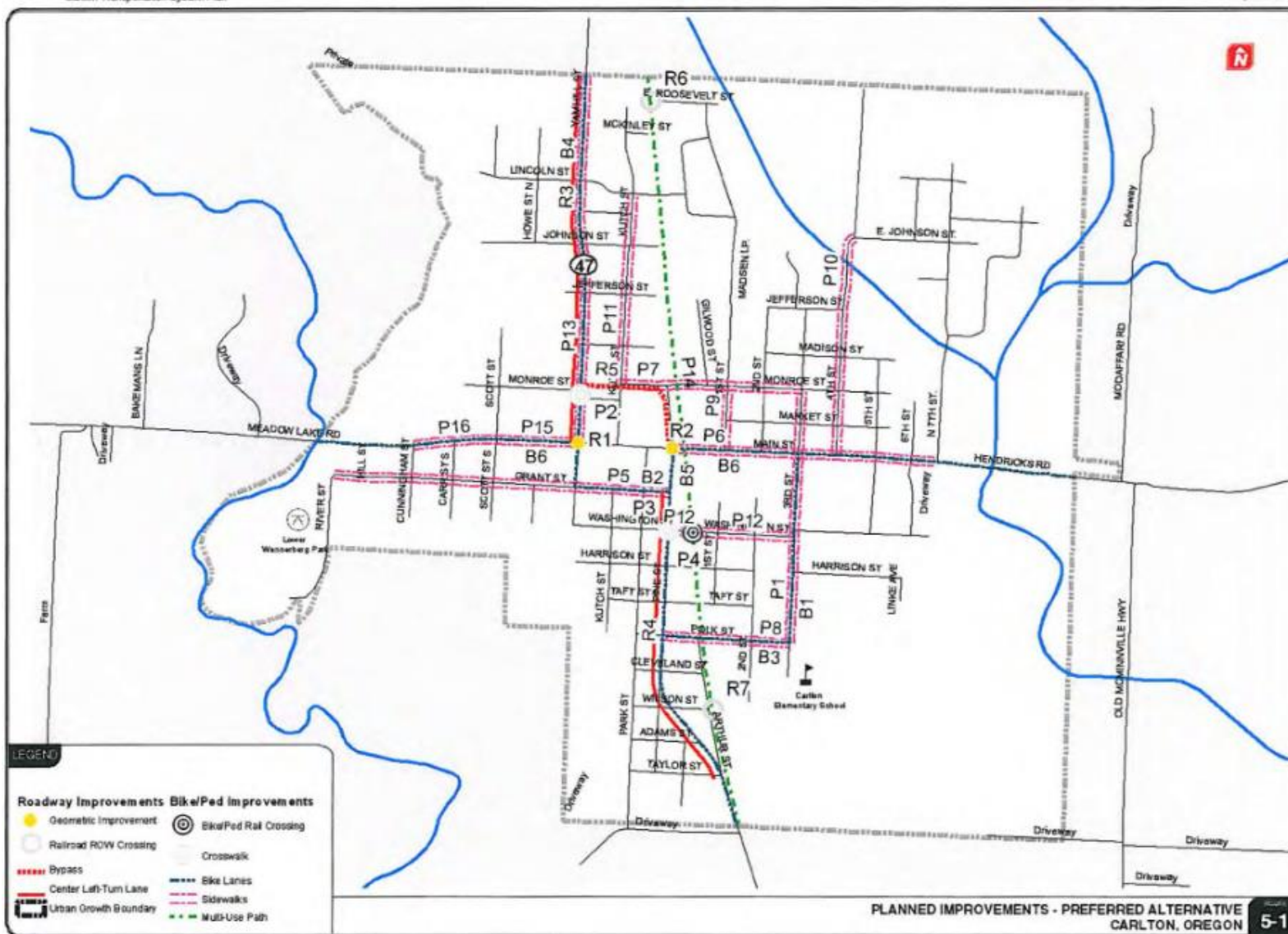
- There is one rail right-of-way owned by the Union Pacific Railroad that runs through the City of Carlton, but no tracks remain in the right-of-way that runs through Carlton.

### **Air Service**

- No public airports are located within the City of Carlton. A general aviation airport is located in McMinnville, north of Carlton. The nearest airport with scheduled passenger service is the Portland International Airport, located approximately 25 miles northeast of Carlton.

The TSP includes a Preferred Plan that summarizes all of the roadway, pedestrian, bicycle, and transit improvements required to address the City of Carlton's transportation goals, as shown in Figure 11. No mitigations are required to meet the ODOT mobility standards along Highway 47; however geometric improvements have been identified to improve safety. Because none of the identified improvements are driven by a timeframe based on future volume projections, the projects are categorized as either short-, medium-, or long-term priority based on how they meet the City's goals and to establish an order in which the projects could potentially be pursued.

Figure 11. Preferred Plan Map



## ENERGY

Electricity, heating oil, bottled gas and wood are the principal fuel types supplying the energy needs for Carlton. The City is not presently served by natural gas. Portland General Electric provides Carlton's electric power. Power is supplied by 57,000-volt transmission line coming from east of the City. PGE indicates that there are no problems with the expansion of the Carlton system to meet expected growth trends. Carlton and Yamhill County are primarily dependent upon power generated from hydroelectric and thermal plants located elsewhere in the Pacific Northwest.

Approximately 78% of the household energy use goes for space and water heating. In terms of personal direct energy use, the private automobile is the largest consumer. In Oregon, approximately 56% of personal direct energy use is attributable to the auto. This compares to 27.2% for space heating and 7.0% for water heating. There is no reason to suspect significant variations from these percentages for residents of Carlton.

The rising cost of energy, coupled with the fact that the majority of our energy comes from nonrenewable sources, necessitates conservation efforts and the investigation of alternative sources of energy. In every facet of urban living, measures should be taken to utilize energy in a most efficient and conserving manner.

## URBANIZATION

A land use plan indicates the area into which various types of activities are expected to occur. Carlton designates five categories of land uses to be described and located on the land use map.

1. Residential. The Residential Plan designation is implemented through the Suburban Residential (SR), Multi-Family Residential (MR), and Manufactured Home (MH) zones. The maximum density in the Suburban Residential Zone is 5.80 dwelling units per acre. The maximum density in the Multi-Family Zone is 13.75 dwelling units per acre. The Manufactured Housing Zone allows for manufactured home parks at a density of 5.80 dwelling units per acre. Manufactured home parks are also allowed as a permitted use in the Multi-Family (MR) Zone at a maximum density of 10 dwelling units per acre.

2. Commercial. The Commercial Plan designation is implemented through the Commercial Business (CB) and Commercial-Industrial (CI) zones. Commercial uses include all activities of a commercial nature as authorized by the implementing zones.
3. Industrial. The Industrial Plan designation is implemented through the Industrial Zone. Industrial use covers the range of manufacturing, warehousing, and wholesaling activities. The Commercial-Industrial (CI) Zone also allows a number of industrial uses.
4. Public Facilities. The Public Facilities Plan designation includes all government and semi-public lands and uses, including park land. The Public Facility (PF) Zone implements this Plan designation.
5. Agricultural Holding. The Agricultural Holding Plan designation is implemented through the Agricultural-Holding (AH) Zone. The Agricultural-Holding Zone includes areas for future growth within the Carlton Urban Growth Boundary (UGB) and allows an orderly phasing of urban development of land. The AH Zone is a holding district that allows agricultural uses to continue until such time that the agricultural lands are needed for urban uses and public facilities and services are available. Conversion of AH property to a non- agricultural use requires a zone change. Comprehensive Plan policies recommend removing the AH zone and assigning other zone types to AH lands.

The land use designations in the Comprehensive Plan are of a general nature and are intended to indicate the expected community growth pattern. Implementation of the plan occurs through more specific actions such as zoning, subdivision control, annexation review, Urban Growth Boundary administration and public facilities planning. Although the plan is designed to be somewhat flexible, it must be understood that it is a significant policy statement and a great deal of responsibility must be exercised in its use and updating.

In 2007, the city conducted a buildable lands inventory. Table 2 shows the amount of developed acreage by zoning designation within the city. Approximately 224.6 acres are currently developed within the Carlton urban area.

**Table 2. Developed Land Uses within the Carlton UGB By Zone, 2007**

Zoning Designation	Acres*	Percent of Total Area
Suburban Residential	145.9	65.0%
Park/Open Space	18.0	8.0%
Multi-Family Residential	11.1	4.9%
Commercial Business	10.9	4.9%
Agricultural Holding	9.5	4.2%
Public	9.2	4.1%
Commercial-Industrial	7.7	3.4%
Manufactured Housing	7.2	3.2%
Industrial	5.1	2.3%
Total	224.6	100.0%

Source: MWVCOG, 2007.

\*Acreage data is from the Yamhill County Assessor and does not include public rights-of-way.

### **Buildable Lands Inventory**

Buildable lands were inventoried for each land type - residential, commercial, and industrial. The analysis of each land type includes totals for land that is completely vacant and redevelopable. The following parameters are used to determine whether land is vacant or redevelopable.

- Vacant residential land includes all parcels that are at least 5,000 square feet (0.11 acres) in size with improvement values of less than \$5,000. The minimum lot size for new residential parcels in the Suburban Residential (SR) Zone is 7,500 square feet, however the City allows development of existing lawfully created lots that are smaller than the minimum lot size. The minimum lot size in the Multi-Family (MR) Zone is 5,000 square feet.
- Vacant commercial or industrial land includes all parcels with improvement values of less than \$5,000.



- Redevelopable residential land consists of residential-zoned parcels that are at least 0.50 acre in size with an improvement value of at least \$5,000. This analysis assumes that 0.25-acre is devoted to the existing house, with the remainder considered vacant (redevelopable).
- Redevelopable commercial and industrial land includes parcels in commercial and industrial zones where some limited improvements have been made, but where potential for redevelopment for more intense uses is probable. For the purpose of this analysis, redevelopable land is defined as commercial or industrial parcels with improvement values of at least \$5,000, where the ratio of land value to improvement value is 1:1 or greater.

The analysis also includes an assessment of land that is not buildable due to physical constraints such as steep slopes, riparian buffers, floodways, and wetlands. These areas have been subtracted from the amount of gross acreage that is considered buildable.

### Residential Land

Table 3 shows the amount of buildable land for each residential zoning district within the Carlton urban area. All of the residential land included in this table is located within the existing city limits. In Carlton, the city limits and urban growth boundary are in the same location.

Approximately 90.1 buildable acres are available for residential development within the urban area. Approximately 166.5 acres within the Carlton UGB are currently developed for residential use.

**Table 3. Buildable Land Inventory, Carlton, 2007**

Zone	Vacant (acres)	Redevelopable	Total
Suburban Residential (SR) Zone	58.9	30.7	89.6
Multi-Family Residential (MR) Zone	0.4	0.0	0.4
Manufactured Home (MH) Zone	0.1	0.0	0.1
<b>Buildable Acres Within the Urban Area</b>	<b>59.4</b>	<b>30.7</b>	<b>90.1</b>

Source: Yamhill County Assessor data, MWVCOG, 2007.

## Commercial Land

Table 4 shows that approximately 8.1 vacant acres are available for commercial development within the Carlton city limits. Approximately 1.9 acres designated for commercial use can be considered redevelopable. Approximately 18.6 acres within Carlton are currently developed for commercial uses.

**Table 4. Buildable Commercial Land<sup>1</sup> Carlton, 2007**

Zone	Vacant (acres)	Redevelopable	Total
Commercial Business (CB) Zone	6.0	1.0	7.0
Commercial-Industrial (CI) Zone*	2.1	0.9	2.9
<b>Buildable Acres within the Urban Area</b>	<b>8.1</b>	<b>1.9</b>	<b>10.0</b>

Source: Yamhill County Assessor data, MWVCOG, 2007.

\*The Commercial-Industrial (CI) Zone also allows all of the industrial uses permitted outright in the General Industrial (GI) Zone. These uses include mini-warehouse storage; assembly, including light manufacturing, processing, packaging, treatment, fabrication of goods or merchandise; laboratories, offices, bottling and distribution centers, light repair facilities, wholesale businesses, and similar uses.

## Industrial Land

Table 5 shows the amount of buildable industrial land within the Carlton urban area. Approximately 1.5 acres of vacant or redevelopable industrial land are available within Carlton. An additional 2.0-acre vacant industrial-zoned parcel has recently been purchased by the Carlton Fire District for development of a new fire station. Approximately 5.1 acres within Carlton are currently developed for industrial uses.

**Table 5. Buildable Industrial Land, Carlton, 2007**

Zone	Vacant(acres)	Redevelopable	Total
General Industrial (GI) Zone	1.0	0.5	1.5
<b>Buildable Acres Within the Urban Area</b>	<b>1.0</b>	<b>0.5</b>	<b>1.5</b>

Source: Yamhill County Assessor data, MWVCOG, 2007.

### **Land for Future Development**

The Agricultural-Holding Zone includes areas for future growth within the Carlton UGB. The AH Zone is a holding district that allows agricultural uses to continue until such time as these lands are needed for urban uses and public facilities and services are available. Table 6 shows that approximately 190.6 acres are available for future development in the Agricultural Holding (AH) Zone.

**Table 6. Buildable Land for Future Development Carlton, 2007**

<b>Zone</b>	<b>Vacant (acres)</b>	<b>Redevelopable</b>	<b>Total</b>
Agricultural Holding (AH) Zone	107.4	83.2	190.6
<b>Buildable Acres Within the Urban Area</b>	107.4	83.2	190.6

Source: Yamhill County Assessor data, MWVCOG, 2007.

### **Land Needs Analysis**

The buildable lands inventory is used in conjunction with the 2027 population projection to determine if adequate land is available for future residential, commercial, and industrial development.

#### **Future Residential Land Needs Residential Densities**

To determine the amount of land needed for future residential development, it is necessary to determine residential densities for single-family and multi-family housing developments. The Carlton Development Code specifies the following maximum densities for residential zones:

- Suburban Residential (SR) Zone – 5.8 dwelling units per acre
- Multi-Family Residential (MR) Zone – 13.8 dwelling units per acre

To determine land needs for residential development, net densities were developed for these zones. This net density is determined by subtracting 25 percent of each developed acre for public facilities, such as street rights-of-way, then applying the minimum lot size to the remainder. The resulting net densities for each zone are as follows:

- Suburban Residential (SR) Zone – 4.4 dwelling units per acre
- Multi-Family Residential (MR) Zone – 10.3 dwelling units per acre

The housing needs analysis identified 233 new residential units that will be needed to accommodate the projected 2027 population of 2,379 persons, as shown in Table 7. Of these 233 new residential units, 176 single-family dwelling units and 57 multi-family dwelling units will be needed. The table is shown again below.

**Table 7. Additional Dwelling Units Needed in Carlton by 2027**

<b>Dwelling Units Needed by 2027</b>	<b>Single-Family Units</b>	<b>Multi-Family Units</b>	<b>Total</b>
Dwelling Units Needed to Meet 2007 Rental Demand	9	18	27
Rental Units Needed by 2027	18	39	57
Owner-Occupied Units Needed by 2027	149	0	149
<b>Total</b>	<b>176</b>	<b>57</b>	<b>233</b>

Source: MWVCOG, 2007.

Table 8 shows the amount of buildable residential land needed through 2027 to accommodate various types of housing, including multi-family housing. Based on the densities described above, approximately 83.1 acres will be needed to provide for residential development in Carlton through 2027.

**Table 8. Projected Housing Mix and Residential Land Needs Carlton, 2027**

<b>Housing Type</b>	<b>Units Needed 2027</b>	<b>Percent of New Units</b>	<b>Density (units/acre)</b>	<b>Acres Needed 2027</b>
Single Family	176	75.5%	4.4	40.0
Multi-Family	57	24.5%	10.3	5.5
Total	233	100.0%		45.5

Source: MWVCOG, 2007.

Looking back at Table 3, approximately 67.1 acres of vacant or redevelopable residential land is available to accommodate future housing needs within the existing urban growth boundary. An estimated 45.5 acres will be needed to accommodate residential growth through 2027. This includes approximately 5.52 acres designated Multi-Family Residential to accommodate multi-family housing needs. An additional 40 acres will be needed to provide for single-family housing development.

To meet the need for multi-family residential development Carlton amended the Comprehensive Plan Map designation and rezoned two (2) properties that were identified as redevelopable in the buildable lands inventory. Table 9 shows the properties that have been rezoned to meet future residential land needs. The amount of buildable acres is a net figure, with 0.25 acres subtracted from the total area of each tax lot to account for the existing dwelling on each property.

**Table 9. Residential Land Re-designations to Meet Projected Need For 2027**

Assessor Map/Tax Lot	Current Plan Designation	Current Zoning	New Plan Designation	New (Proposed) Zoning	Buildable Acres
3422CC 1100	Residential	Suburban Residential	No change	Mixed-Density Residential	4.7
3422CC 1101	Agricultural Holding	Agricultural Holding	Residential	Multi-Family Residential	0.7
3422BC 300	Residential	Suburban Residential	No change	Mixed-Density Residential	1.8
<b>Total</b>					<b>7.3</b>

Source: MWVCOG, 2007.

Table 10 shows the buildable residential land within the urban area after properties have been re-designated to meet projected housing need through 2027. Approximately 62.2 acres is available for single-family residential development in the Suburban Residential Zone where an estimated 40 acres is needed. Approximately 6.3 acres will be available for multi-family development in the Multi-Family Residential (MR) Zone. The city has provided sufficient land for various housing types and densities in response to projected need.



**Table 10. Buildable Residential Land after Re-designations Carlton, 2007**

<b>Zone</b>	<b>Vacant (acres)*</b>	<b>Redevelopable</b>	<b>Total</b>	<b>Acres Needed 2027</b>
Suburban Residential (SR)	57.1	30.0	88.9	40.0
Multi-Family Residential (MR)	0.4	0.7	1.1	5.7
Mixed-Density Residential (MX)**	1.8	4.7	6.5	
Manufactured Home (MH) <sup>1</sup>	0.1	0.0	0.1	NA
<b>Total</b>	<b>59.4</b>	<b>35.4</b>	<b>94.8</b>	<b>45.7</b>

Source: MWVCOG, 2007.

\*No specific analysis of future need in the Manufactured Home (MH) Zone is required as manufactured home parks with a maximum density of 10 units per acre are allowed as a permitted use in the Multi-Family Residential Zone.

\*\*The MX Zone provides for a mixture of housing types with a maximum density of nine (9) dwelling units per acre.

### **Future Commercial and Industrial Land Needs**

The Economy section of the Comprehensive Plan includes a 2027 projection of local employment (see Table 8). One purpose for forecasting local employment is to determine if sufficient land is currently designated in the Comprehensive Plan to accommodate projected commercial and industrial development. Table 7 of the Economics Element shows the projected amount of land need for commercial and industrial uses through 2027. That information is also included in Table 11 below.

**Table 11. Comparison of Supply and Demand for Commercial and Industrial Land Carlton, 2027**

<b>Land Use Type</b>	<b>Vacant/ Redevelopable Acres</b>
<b>Supply</b>	
Commercial	9.5
Industrial	2.5
<b>Total Supply</b>	<b>12.0</b>
<b>Demand</b>	

Commercial	4.6
Industrial	13.3
<b>Total Demand</b>	<b>17.9</b>
<b>Surplus (Deficit)</b>	
Commercial	4.9
Industrial	(10.8)

Source: MWVCOG, 2007.

To meet the need for future industrial growth, Carlton amended the Comprehensive Plan Map designation and rezoned a 11.0-acre portion of a 21.8-acre property that was formerly designated and zoned Agricultural Holding as shown in Table 46.

**Table 12. Residential Land Re-designations to Meet Projected Need For 2027**

Assessor Map/Tax Lot	Current Plan Designation	Current Zoning	New Plan Designation	New (Proposed) Zoning	Property Size (acres)	Area Proposed for Redesignation Rezoning (acres)
3421 300	Agricultural Holding	Agricultural Holding	Industrial	General Industrial	21.8	11.0
<b>Total</b>						<b>11.0</b>

Comp Plan 2000	Deleted, Modified, or Retained	Comp Plan 2023	New
<b>CITIZEN INVOLVEMENT</b>		<b>1. CITIZEN INVOLVEMENT</b>	
<b>Goal</b>		<b>Goal</b>	
1. To maintain a Citizen Involvement Plan that ensures the opportunity for citizens to be involved in all phases of the planning process.	<b>RETAINED</b>	To maintain a Citizen Involvement Plan that ensures the opportunity for citizens to be involved in all phases of the planning process.	
<b>Policies</b>		<b>Policies</b>	
1. The City shall employ a variety of methods of informing citizens and obtaining their opinions and attitudes on matters relating to the planning process.	<b>MODIFIED:</b> Language changed and objectives added to Policy 1.	1. Employ a variety of methods to educate and inform citizens on matters relating to the planning process. 1A. During community engagement events, offer materials and planning expertise by the way of both physical take-home and digital options. 1B. Provide opportunities to participate that are appropriate to community members of all abilities. 1C. Leverage community groups and partnerships to assist in increasing our reach and ability to communicate with community members.	
2. The City shall continue to involve citizens in all phases of the planning process.	<b>MODIFIED:</b> Language changed and objectives added to Policy 2.	2. Engage citizens by obtaining their opinions in all phases of the planning process, promoting strategies to reach underrepresented populations. 2A. Solicit and support participation from underrepresented populations on citizen advisory committees and commissions. 2B. Use multiple forms of communication to ensure community awareness and involvement.	
3. In accordance with state law, the City shall conduct all hearings leading to a land use decision as quasi-judicial hearings.	<b>DELETED</b>		
4. The City shall incorporate into its land use regulations the provisions of state law regarding the conduct of quasi-judicial hearings and shall regularly review those regulations and make changes required to maintain them in conformance with state law and court interpretations.	<b>DELETED</b>		
		3. As the Committee for Citizen Involvement, the Planning Commission will meet at least once per year to review public involvement activities. 3A. Apprise city staff of effective and ineffective means for informing community members on matters related to the planning process and pending process. 3B. Solicit interest from high school students for service on the Commission, specific to an advisory role, for the Commission and staff to gain perspective in reaching under-represented populations.	<b>NEW</b>
<b>LAND USE PLANNING</b>		<b>2. LAND USE PLANNING</b>	
<b>Goal</b>		<b>Goal</b>	
1. To maintain a land use planning process and policy framework as a basis for all decisions and actions related to the use of the land and to assure an adequate factual base for such decisions and actions.	<b>RETAINED</b>	To maintain a land use planning process and policy framework as a basis for all decisions and actions related to the use of the land and to assure an adequate factual base for such decisions and actions.	
<b>Policy</b>		<b>Policies</b>	
1. The Planning Commission will conduct a thorough review of the Plan and Implementing Ordinances at least as often as directed by the Oregon Department of Land Conservation and Development in order to satisfy the periodic review requirements of ORS 197.633.	<b>MODIFIED:</b> Language changed and absorbed into Policy 1.	1. Review and update or amend the Comprehensive Plan every 10 years.	

		2. Ensure land policies and procedures are addressed in the city’s development code and other implementing ordinances.	<b>NEW</b>
		3. Initiate a process to phase out the Agricultural Holding designation. Assign new urban land use designations to areas that are currently within the Agricultural Holding District. Agricultural uses will still be allowed for areas outside city limits, but an urban zone district will be applied upon annexation.	<b>NEW</b>
<b>NATURAL RESOURCES</b>		<b>5. NATURAL RESOURCES, SCENIC AND HISTORIC AREAS, AND OPEN SPACES</b>	
<b>Agricultural Lands</b>			
<b>Goal</b>			
1. To preserve the economic livelihood of the farmer by preserving prime agricultural land for farming.	<b>DELETED</b>		
<b>Policies</b>			
1. Agricultural land conversion to urban uses shall be done only when adequate public facilities and services are available to the area(s) proposed for development.	<b>DELETED</b>		
2. The City shall retain established agricultural holding zones until agricultural lands are needed for urban uses.	<b>DELETED</b>		
3. The City shall encourage Yamhill County to restrict commercial and residential development outside the Carlton Urban Growth Boundary.	<b>DELETED</b>		
<b>Forest Lands</b>			
none.	<b>DELETED</b>		
<b>Open Spaces and Scenic Sites</b>			
<b>Goal</b>		<b>Goal</b>	
1. To conserve open spaces and preserve, scenic, and resources.	<b>MODIFIED:</b> Utilizing Statewide Planning Goals.	To conserve open space, protect natural and scenic resources, and preserve historic and cultural resources.	<b>NEW</b>
<b>Policies</b>		<b>Policies</b>	
		1. Protect and enhance natural resources through proper use, maintenance, and development. 1A. Maintain a healthy and diverse tree canopy and other publicly owned vegetation. 1B. Encourage low-impact development techniques and other strategies to preserve and enhance waterways, creeks, rivers and riparian areas, and wetlands. Objective 1C. Provide notice to the Department of State Lands if development or a land division is in the vicinity of a wetland or an areas of predominantly hydric soils as shown on the State Wetlands Inventory.	<b>NEW</b>

<p>1. The City shall ensure that as development occurs, adequate land will be retained in permanent open space.</p>	<p><b>MODIFIED:</b> Absorbed into Policy 2.</p>	<p>2. Maintain and expand the city’s open-space network, especially greenways and open space along creeks.                  2A. Ensure adequate open space and trail development in high density development and neighborhoods lacking access to these amenities.                  2B. Manage open space areas for their value in linking citizens and visitors with the natural environment.</p>	
		<p>3. Identify sites and structures relating to the history of the state and the city that should be identified, protected, and enhanced.                  3A. Encourage property owners to preserve and restore historic structures, sites, and elements especially within the downtown core and urban renewal district.                  3B. Register qualified buildings and structures on National and/or State Registry of Historical Sites.                  3C. Consider the reuse or relocation of city-owned historical structures as an alternative to redevelopment or demolition.                  3D. Apply baseline protections as described in OAR 660-0200(8) to any sites on the National Register of Historic Places.</p>	<p><b>NEW</b></p>
		<p>4. If archeological sites are identified in the city, coordinate with the State Historic Preservation Office to establish a review procedure that meets state requirements.</p>	<p><b>NEW</b></p>
<p>2. Efforts shall be made to preserve creeks and floodplain areas as open space. These areas shall be maintained to provide a natural storm water and drainage system. Bicycle and pedestrian pathways should be examined for possible inclusion in these areas.</p>	<p><b>MODIFIED:</b> Absorbed into Policy 5.</p>	<p>5. Preserve and maintain creeks and floodplain areas as open space to provide a natural storm water and drainage system.</p>	
		<p>6. Preserve the water quality, ground water recharge, and flood storage functions of wetlands.</p>	<p><b>NEW</b></p>
		<p>7. Work with the Oregon Department of Fish and Wildlife to update factual background information in the Comprehensive Plan Appendix.</p>	<p><b>NEW</b></p>
<p>3. To maintain and improve the visual quality of the City, outdoor advertising signs shall be regulated, particularly in non-industrial and non-commercial zones. Signs throughout the City should be aesthetically pleasing.</p>	<p><b>DELETED</b></p>		
<p><b>Mineral and Aggregate Resources</b></p>			
<p><b>Goal</b></p>			
<p>none.</p>	<p><b>DELETED</b></p>		
<p><b>Policy</b></p>			
<p>1. The City shall support the development and protection of mineral and aggregate resources throughout Yamhill County.</p>	<p><b>DELETED</b></p>		
<p><b>Energy Resources</b></p>			
<p>none.</p>	<p><b>DELETED</b></p>		
<p><b>Fish and Wildlife Resources</b></p>			
<p>none.</p>	<p><b>DELETED</b></p>		

<b>Historic and Cultural Resources</b>		
<b>Goal</b>		
1. To conserve historic and cultural resources.	<b>MODIFIED:</b> Utilizing Statewide Planning Goals.	
<b>Policies</b>		
1. The City's designated historic sites shall be protected, promoted, and enhanced as important community resources.	<b>MODIFIED:</b> Language absorbed into Policy 3.	
2. Preservation of Carlton's designated historic structures shall be promoted by prohibiting the construction of adjacent buildings that would detract from the visual and aesthetic qualities of the historic structures.	<b>DELETED</b>	
3. Carlton's inventory of historic resources shall be continually updated to include any additional qualifying sites or structures. Special funding sources and incentive programs for restoration and preservation should be investigated.	<b>MODIFIED:</b> Language absorbed into Policy 3.	
4. If archeological sites are identified in the City, the City will coordinate with the State Historic Preservation Office in establishing a review procedure that meets the requirements of Administrative Rule 660-16-025.	<b>MODIFIED:</b> Language absorbed into Policy 4.	
5. The City shall coordinate with and seek advice from the State Historic Preservation Office in matters regarding existing and potential historic sites and/or structures.	<b>DELETED</b>	
<b>Water Resources</b>		<b>6. AIR, WATER, AND LAND RESOURCES QUALITY</b>
<b>Goals</b>		<b>Goal</b>
1. To protect Carlton's water quality through compliance with State, Regional, and Federal water quality standards.	<b>MODIFIED:</b> Utilizing Statewide Planning Goals.	To maintain and improve the quality of the air, water, and land resources of the city.
2. To protect groundwater and aquifer resources from damage by residential, industrial, and commercial development.	<b>DELETED</b>	
3. To protect Carlton's Panther Creek Watershed through coordination with Yamhill County, private landowners, and BLM.	<b>DELETED</b>	
<b>Policies</b>		<b>Policies</b>
1. To protect Carlton's water resources through coordination with the Department of Water Resources.	<b>MODIFIED:</b> Absorbed into Policy 1.	<p>1. Protect air, water, and land quality from the impacts of development through applicable state or federal environmental quality standards.</p> <p>1A. Encourage the use of pervious surfaces in new development to prevent the negative ecological effects of urban stormwater runoff.</p> <p>1B. Prioritize on-site stormwater management except where the City determines it to be inefficient or infeasible.</p> <p>1C. Promote land-use patterns that offer opportunities for amenities close to residential areas to</p>



<p>2. The City has been identified as a major water table area with a sensitive aquifer by the DEQ. At the appropriate time, the City will coordinate with the DEQ in the implementation of its program for water table areas with sensitive aquifers. The DEQ anticipates this program may have an effect of the placement of septic tanks and underground storage tanks.</p>	<p><b>MODIFIED:</b> Absorbed into Policy 1.</p>	<p>1C. Promote land-use patterns that offer opportunities for amenities close to residential areas to reduce vehicle miles travelled and associated emissions.                  1D. Development within the city shall comply with applicable state and federal water quality regulations.                  1E. Respond to directives issued in a Total Maximum Daily Load (TMDL) Implementation Plan for any waterways within the city that are declared water quality limited by the Department of Environmental Quality.</p>	
		<p>2. Encourage lighting design and practices that reduce the negative impacts of light pollution.                  2A. Manage city lighting so that they are only on when needed, only light intended areas, are no brighter than necessary, minimize blue light emissions, and eliminate upward- directed light.</p>	<p><b>NEW</b></p>
<p>3. The City shall propose a cooperative agreement between private industry, Yamhill County, and BLM for watershed protection and enhancement.</p>	<p><b>MODIFIED:</b> Absorbed into Policy 3.</p>	<p>3. Participate in appropriate environmental quality planning efforts on a regional level.                  3A. Collaborate on significant environmental quality protective measures with neighboring communities.</p>	
<p><b>Air Resources</b></p>			
<p><b>Goals</b></p>			
<p>1. To maintain and improve the quality of the air resources of the City and State.</p>	<p><b>MODIFIED:</b> Utilizing Statewide Planning Goals.</p>		
<p><b>Policies</b></p>			
<p>1. The City shall support State and Federal agency efforts to maintain and improve the air resources of the City and the State.</p>	<p><b>MODIFIED:</b> Absorbed into Policy 1.</p>		
<p>2. The City shall restrict future developments, which would detrimentally affect the quality of the air resources.</p>	<p><b>DELETED</b></p>		
<p>3. The City shall encourage alternative forms of transportation to reduce automobile emission pollution.</p>	<p><b>DELETED</b></p>		
<p>4. All development within the City shall comply with D.E.Q. air quality standards.</p>	<p><b>MODIFIED:</b> Absorbed into Policy 1.</p>		
<p><b>NATURAL HAZARDS</b></p>			
<p><b>Flood Hazards</b></p>			
<p><b>Goals</b></p>			
<p>1. To minimize danger to public safety and welfare from flooding and to improve the general welfare by reducing economic loss due to interruption of business and industry, or damage to homes and other properties.</p>	<p><b>MODIFIED:</b> Utilizing Statewide Planning Goals.</p>	<p>Goal</p>	
<p>2. To minimize damage to public facilities and utilities such as water, electric, telephone and sewer lines, and streets and bridges located in areas of specific flood hazard.</p>	<p><b>MODIFIED:</b> Utilizing Statewide Planning Goals.</p>	<p>To protect people and property from the effects of natural hazards.</p>	
<p>3. To help maintain a stable tax base by providing for the sound use and development of areas of specific flood hazard so as to minimize future flood blight areas.</p>	<p><b>DELETED</b></p>		

4. To minimize expenditure of public money required for costly flood control and recovery programs.	<b>DELETED</b>		
<b>Policies</b>		<b>Policies</b>	
1. The City shall restrict or prohibit uses which are dangerous to health, safety, and property due to water, or erosion hazards, or which result in damaging increases in erosion or in flood heights or velocities.	<b>DELETED</b>		
2. The City shall designate areas of recognized flood hazard.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 1.	<p>1. Concentrate urban uses on suitable lands, and limit development in food plains, areas susceptible to wildfire, and lands with steep slopes and/or unstable soils.</p> <p>1A. Limit development in flood plains through the land use application process. Ensure continued Compliance in the National Flood Insurance Program</p> <p>1B. Permit non-residential development in the flood fringe (the outer portions of the foodplain) if it satisfies local code requirements regarding the height of the structure’s main floor above floodwaters, ‘flood proofing’ construction, displacement of floodwaters, and similar matters.</p> <p>1C. Identify and map potential areas for landslides – high, moderate, and low.</p>	
		2. Promote earthquake hazard awareness and hazard mitigation activities by providing information to residents, such as retrofitting measures that can reduce the vulnerability of dwellings.	<b>NEW</b>
3. The City shall recognize and incorporate additional flood data as it becomes available.	<b>DELETED</b>		
4. The City shall make information regarding flood hazards available to the public to ensure that those who consider occupying areas of potential or existing flood hazard have access to appropriate information and assume responsibility for their actions.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 3.	3. Maintain procedures to advise applicants for development permits of the areas known to have a potential for natural hazard effects.	
		<p>4. Develop a disaster preparedness plan that outlines how the city will prevent, protect against, mitigate, respond to, and recover from natural disasters.</p> <p>4A. Ensure key city services, such as water and sewer have the capability for back-up electricity during emergencies.</p> <p>4B. Coordinate with other agencies and partners to ensure critical services are provided during emergencies.</p> <p>4C. Develop and implement programs to coordinate maintenance and mitigation activities to reduce risk to public infrastructure from severe winter storms.</p> <p>4D. Evaluate ash impact on stormwater drainage system, utility infrastructure, transportation network, public facilities, and develop mitigation actions.</p> <p>4E. Coordinate wildfire mitigation action items through the Yamhill County Community Wildfire Protection Plan.</p> <p>4F. Provide wildland fire information in an easily distributed format for all residents.</p>	<b>NEW</b>

		5. Work with Yamhill County and neighboring jurisdictions to update the Yamhill County Multi-Jurisdictional Natural Hazard Mitigation Plan by January 2026 to comply with new requirements from the Federal Emergency Management Agency.	<b>NEW</b>
5. The City shall require that uses vulnerable to floods, including facilities that serve such uses, be protected against flood damage at the time of initial construction.	<b>DELETED</b>		
6. The City shall ensure that public utilities be protected from flood hazard at the time of initial construction.	<b>DELETED</b>		
7. The City shall control the alteration of natural flood plains, stream channels, and natural protective barriers, which help accommodate or channel floodwaters.	<b>DELETED</b>		
8. The City shall control filling, grading, dredging and any other development that may increase flood damage.	<b>DELETED</b>		
9. The City shall prevent or regulate the construction of flood barriers that may increase flood hazards in other areas.	<b>DELETED</b>		
10. The City shall enforce its Flood Hazard Zone as a way to guide development within the flood plain and encourage expansion into areas not affected by the flood plain hazards.	<b>DELETED</b>		
11. The City shall control runoff from newly developed areas that increases flood hazard and/or erosion?	<b>DELETED</b>		
<b>Seismic Hazards</b>			
<b>Goals</b>			
1. To reduce the potential for loss of life and bodily injury from seismic activity.	<b>MODIFIED:</b> Utilizing Statewide Planning Goals.		
2. To minimize the potential for earthquake related damage in Carlton.			
<b>Policies</b>			
1. Carlton will promote earthquake hazard awareness and hazard mitigation activities in the community by periodically providing information to residents such as on retrofitting measures that can reduce the vulnerability of dwellings.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 2.		
2. Carlton will seek adequate funding sources to coordinate an assessment of the level of earthquake preparedness in the community and the vulnerability of key public facilities. The assessment will include the development of a prioritized list of hazard reduction activities.	<b>DELETED</b>		
<b>Soil Hazards</b>			
<b>Goal</b>			
1. To recognize areas of soil hazard and require that uses vulnerable to soil hazard be protected from future damage at the time of initial construction.	<b>MODIFIED:</b> Utilizing Statewide Planning Goals.		
<b>Policies</b>			
1. The City shall designate areas of recognized soil hazard.	<b>DELETED</b>		
2. The City shall make information regarding soil hazards available to the public to ensure that those who consider occupying areas of potential or existing hazard have access to appropriate information and assume responsibility for their actions.	<b>MODIFIED:</b> Language absorbed into Policy 3.		

3. The City shall request assistance and comment from appropriate agencies in evaluating development in areas of known soil hazard.	DELETED		
4. The City shall, through assistance from appropriate agencies, ensure that criteria for building in soil hazard areas are met.	DELETED		
5. The City shall ensure that building plans of large structures in areas of known hazard, including industrial and commercial structures, bear the stamp of an engineer, registered in the State of Oregon, and his statement that foundation plans are adequate for the soil conditions on the site.	DELETED		
6. The City shall ensure that public utilities and services be protected from soil hazard at the time of initial construction.	DELETED		
<b>Slope Hazards</b>			
<b>Goal</b>			
1. To designate areas containing steep slopes for land uses commensurate with the ability of the land to support the development.	DELETED		
<b>Policies</b>			
1. The City shall make sure that proper grading and engineering procedures are followed when building on steep slopes to avoid soil erosion, roadway and structure collapse and mass movement of underlying geologic structure.	MODIFIED: Language simplified and absorbed into Policy 1.		
2. The City shall ensure that native vegetation is retained in sufficient amount to prevent soil erosion.	DELETED		
<b>RECREATION</b>		<b>8. RECREATIONAL NEEDS</b>	
<b>Goal</b>		<b>Goal</b>	
1. To provide adequate park land and recreational facilities for the citizens of the community.	MODIFIED: Utilizing Statewide Planning Goals.	To satisfy the recreational needs of Carlton’s community and visitors alike.	
<b>Policies</b>		<b>Policies</b>	
1. Recreational facilities and services shall be expanded as the need arises.	MODIFIED: Language changed, actionable items added, and objectives added to Policy 1.	1. Develop a high-quality, diverse system of parks and park programs that provide adequate and equitable park access to all residents. 1A. Identify and reserve land for parks and recreation within the urban growth boundary. 1B. Encourage developers to dedicate park sites as a part of the land use process. 1C. Ensure adequate park and trail development in high density development and neighborhoods currently disconnected from these amenities.	
2. To the extent possible, the acquisition of park sites in advance of actual need shall be made to assure the availability of adequate, properly located sites. The City shall investigate and enact appropriate funding alternatives and other suitable techniques for the acquisition and development of park and recreational facilities.	DELETED		
3. Continued availability and use of school-owned recreational facilities by the general public shall be encouraged in the future. In addition, schools and parks shall be located on adjacent sites whenever possible.	DELETED		

4. Development of bicycle and pedestrian pathways should be examined as a potential recreational resource for the citizens of Carlton.	<b>MODIFIED:</b> Absorbed into policy 2.	2. Create a network of shared-use pedestrian and bicycle trails to enable connectivity between parks, neighborhoods, schools, and public amenities. 2A. Work with Cycle Yamhill County to establish and promote trails and other outdoor recreation projects.	
5. The City shall support Yamhill County in meeting its anticipated demand for future parkland for recreational uses.	<b>DELETED</b>		
6. The city shall seek funding for a park and recreational study sufficient to identify and program future park and recreational facility and property needs.	<b>DELETED</b>		
		3. Coordinate with adjacent jurisdictions to plan for and create parkland and recreational facilities. 3A. Ensure the adequacy of pedestrian and bicycle connections to local, county, and regional trails.	<b>NEW</b>
		4. Establish and maintain a healthy urban forest by encouraging a diverse selection of trees in parklands.	<b>NEW</b>
<b>ECONOMY</b>		<b>9. ECONOMIC DEVELOPMENT</b>	
<b>Goal</b>		<b>Goal</b>	
1. To provide for the needs of existing industries, encourage desired economic growth, develop a stable community-based economy, and provide for greater employment opportunities for Carlton's citizens.	<b>MODIFIED:</b> Utilizing Statewide Planning Goals.	To diversify and improve the economy of Carlton.	
<b>Policies</b>		<b>Policies</b>	
1. Carlton shall encourage the type of industrial development that contributes substantially to the community's economy by assuring that revenues and wages generated will be recycled through the local economy.	<b>MODIFIED:</b> Language changed to reflect other economically viable land uses in Policy 1.	1. Plan for an adequate supply of commercial and industrial land to accommodate the types and amount of economic development and growth anticipated in the future. 1A. Identify current and potential commercial and industrial land within the urban growth boundary and analyze it based on market factors and its suitability for economic growth.	
2. Carlton shall encourage industry that will raise the wage scale in the community.	<b>MODIFIED:</b> Language changed to be more detailed and reflect actionable items and objectives in Policy 2.	2. Create conditions that encourage growth of existing businesses, entrepreneurs, and attraction of new businesses to create jobs with a range of wages. 2A. Support heritage industries such as agriculture and forestry. 2B. Limit the amount of commercial use allowed on land with an industrial zone designation. 2C. Promote commercial development in the downtown core that will diversify the local economy where those businesses are compatible with the city's small-town character, provide necessary services and limit large commercial options.	
3. Carlton shall encourage industry that will offer employment to, and create a balance between, a broad range of workers, including professional, skilled and unskilled labor.	<b>MODIFIED:</b> Absorbed into Policy 2.		
4. Industry shall be encouraged that provides training opportunities in skills that can be transferred to other job categories and opportunities.	<b>DELETED</b>		
5. The City shall encourage industry that would pay its fair share for services required for its establishment and maintenance.	<b>DELETED</b>		

6. An industrial facility proposal shall be evaluated to consider the social, environmental, and economic impacts to the City and surrounding area before being approved.	DELETED		
7. An industrial facility proposal shall be evaluated to consider both short and long term social, environmental, and economic impacts to the City and surrounding area before being approved.	DELETED		
8. Carlton shall encourage industry and/or economic activity that will be energy efficient and include, but are not limited to the following: (a) efficient building, manufacturing and heating practices, (b) Co-generation systems including the burning of wastes, and (c) Utilization of new and alternative systems	DELETED		
9. Carlton shall encourage industrial development that meets appropriate D.E.Q. pollution control requirements.	DELETED		
10. Carlton shall, encourage a strategy of economic development that will: (a) efficiently utilize and develop existing resources, (b) encourage further development and expansion of existing facilities and industries and/or economic activity, (c) identify local, state, and federal resources to assist in the economic and industrial expansion (growth) desired in Carlton, (d) identify and correct problems that discourage desired economic growth, and (e) identify and promote industry and/or economic activity that will be compatible with, and enhance and maintain Carlton's small town character, quality of life and identity.	MODIFIED: Some language incorporated into Policy 2.		
11. Carlton shall direct future industrial growth determined to be incompatible with residential neighborhoods away from existing or designated areas of future residential development. These industries shall be sited in controlled areas sufficiently buffered from adjacent uses to prevent conflict.	DELETED		
12. Industrial development along Highway 47, including the entrances to Carlton, shall be attractively designed with landscaping to screen industrial storage and work areas from view.	DELETED		
13. Carlton shall encourage business development that retains, strengthens and expands the business base in Carlton.	MODIFIED: Absorbed into Policy 2.		
14. Carlton shall encourage businesses that will complement and improve the existing downtown commercial mix and will enhance downtown's attractiveness to its target markets.	MODIFIED: Absorbed into Policy 3.	3. Implement policies and programs to support and encourage local, commercial development downtown. 3A. Seek input from existing local businesses downtown during decision-making processes. 3B. Ensure land uses and transportation connections that provide access for residents and support tourism within the downtown core.	



<p>15. Carlton shall maintain a long-term (20 year) supply of industrial and commercial lands that includes a variety of parcel sizes and locations. Redesignation of land to or from commercial or industrial zones may be allowed providing:</p> <p>a. It serves the community's interests and does not impact the long-term continuity of the 20 year land supply; and</p> <p>b. There is a demonstrated need to expand the industrial/commercial or non-residential land use supply.</p>	<p><b>DELETED</b></p>		
<p>16. Carlton will review the City's economic forecast and commercial and industry land supply as updated employment data and regional forecasts become available.</p>	<p><b>DELETED</b></p>		
<p><b>HOUSING</b></p>		<p><b>10. HOUSING</b></p>	
<p><b>Goal</b></p>		<p><b>Goal</b></p>	
<p>1. To develop a variety of housing opportunities to meet the needs of all present and future residents at the lowest possible cost, and with the highest possible standards.</p>	<p><b>MODIFIED:</b> Utilizing Statewide Planning Goals.</p>	<p>To provide housing options to meet the needs of current and future residents.</p>	
<p><b>Policies</b></p>		<p><b>Policies</b></p>	
<p>1. To permit new developments only when all urban services become available. These services shall include: public water, sanitary sewers, storm drainage, solid waste collection, streets, parks and recreation facilities, and adequate police, and fire protection.</p>	<p><b>RETAINED</b></p>	<p>1. Permit new developments only when all urban services become available. These services include: public water, sanitary sewers, storm drainage, solid waste collection, streets, parks and recreation facilities, and adequate police, and fire protection.</p>	
<p>2. To conserve and improve structurally sound existing housing stock in Carlton.</p>	<p><b>DELETED</b></p>		
		<p>2. Monitor residential land development to ensure that there is enough residential land to accommodate the long-term forecast for population growth.</p>	<p><b>NEW</b></p>
<p>3. Within already-developed areas, a variety of infill housing types shall be made available using appropriate density and design standards.</p>	<p><b>MODIFIED:</b> Language absorbed into Policy 3.</p>	<p>3. Encourage a mix of housing types dispersed throughout the city and within neighborhoods including attached and detached single-family housing and multifamily options.</p>	
<p>4. The City recognizes manufactured housing as a significant source of housing supply, and manufactured dwelling units shall be permitted anywhere single-family dwellings are permitted, subject to the construction standards and exceptions allowed by State law.</p>	<p><b>MODIFIED:</b> Absorbed into Policy 4.</p>	<p>4. Encourage the development and preservation of housing affordable to low-to moderate-income households.            4A. Protect existing manufactured home parks to retain existing homes.            4B. Review development code to remove barriers to middle housing types, including plexes, townhomes, and cottage clusters.</p>	
		<p>5. Encourage the development of housing options that are accessible to people of all abilities and allow residents to age in place. Specifically smaller, single-level housing options.</p>	<p><b>NEW</b></p>
<p>5. To assist parties to access to federal, state, or other funds for the rehabilitation of existing housing.</p>	<p><b>DELETED</b></p>		

<p>6. Residential Land Use Policy</p> <p>a. All residential development within the City of Carlton shall conform to the state building, electrical, plumbing, and fire codes. Residential development shall be encouraged in a compact and efficient manner to provide the needed housing units for varying income levels, reduce the amount of land used for residences, conserve energy supplies, and facilitate the provision of public facilities and services in an efficient and economic manner.</p> <p>b. The City shall encourage a mix of housing types including duplex development within new subdivisions and residential planned unit developments until the City's housing mix more closely resembles the preferred ratio of 75 percent single-family to 25 percent multifamily.</p> <p>c. Varying lot sizes and configurations shall be encouraged in order to provide for a variety of housing types, densities and designs.</p>	<p><b>DELETED</b></p>		
<p><b>PUBLIC FACILITIES AND SERVICES</b></p>		<p><b>11. PUBLIC FACILITIES AND SERVICES</b></p>	
<p><b>Goals</b></p>		<p><b>Goals</b></p>	
<p>1. To develop a timely, orderly, and efficient arrangement of public facilities and services to serve as a framework for future development.</p>	<p><b>MODIFIED:</b> Utilizing Statewide Planning Goals.</p>	<p>To plan and develop a timely, orderly, and efficient arrangement of public facilities and services to serve as a framework for urban development consistent with the city's vision.</p>	
<p><b>Policies</b></p>		<p><b>Policies</b></p>	
<p>1. Public facilities and services plans shall coordinate the type, location, and delivery of public facilities and services in a manner that best supports the existing and proposed land use of Carlton.</p>	<p><b>DELETED</b></p>		
<p>2. The City shall promote the upgrading and maintenance of the wastewater system as a vital element to the continued well-being of the community, and shall cooperate with and coordinate such efforts with applicable regional, state, and federal agencies.</p>	<p><b>MODIFIED:</b> Language simplified and absorbed into Policy 1.</p>	<p>1. Modernize and maintain municipal facilities in the most efficient and cost-effective manner to adequately serve the existing population and anticipated growth.            1A. Plan, operate and maintain the water distribution, stormwater, and sewer management systems for all current and anticipated city residents within its existing urban growth boundary and plan strategically for future expansion areas.</p>	
<p>3. Existing residences not connected to the existing wastewater system shall receive first priority for sewer hookup when the system is upgraded and expanded.</p>	<p><b>DELETED</b></p>		
<p>4. The City shall identify and promote equitable sewer and water assessment schemes.</p>	<p><b>MODIFIED:</b> Language incorporated into Policy 2.</p>	<p>2. Identify and promote equitable sewer, water, and stormwater assessment methodologies.            2A. Identify and remediate areas currently underserved by infrastructure.            2B. Make investments to support the equitable provision of infrastructure.            2C. Coordinate with franchise utilities to encourage equitable access to services.</p>	
<p>5. Developable areas which are most easily served by public facilities and services shall be identified and promoted as priority development areas.</p>	<p><b>MODIFIED:</b> Language simplified and absorbed into Policy 1.</p>		
<p>6. Carlton shall examine, identify, and promote energy efficient and cost effective methods to provide and maintain public facilities and services. These include, but are not limited to street, curb, and sidewalk construction and provision of adequate drainage measures, both man-made and natural, to accommodate storm runoff.</p>	<p><b>MODIFIED:</b> Language incorporated into Policy 3.</p>	<p>3. Examine, identify, and promote energy efficient and cost-effective methods to provide and maintain public facilities and services.</p>	
		<p>4. Ensure adequate and responsive emergency services for the Carlton community.</p>	<p><b>NEW</b></p>
		<p>5. Establish and maintain a healthy tree canopy urban forest by encouraging a diverse selection of trees adaptable to the changing climate for the city's streetscapes.</p>	<p><b>NEW</b></p>

		6. Preserve and protect existing healthy mature trees along streets, especially in rights-of-way and planting strips, through development and maintenance of those rights-of-way.	<b>NEW</b>
7. A public facility and service should not be provided in a developable area unless there is provision for the coordinated development of all facilities and services applicable to the kind of development intended.	<b>DELETED</b>		
8. The City shall ensure that adequate sedimentation, erosion control, and drainage measures are taken for all new buildings and development.	<b>DELETED</b>		
9. The City shall investigate and promote measures to improve and maintain a high standard of water quality within the domestic water system.	<b>DELETED</b>		
10. Carlton, when in the best interest of the community, should support and promote the use of countywide social services. Particular attention shall be paid to the needs of the youth and the elderly.	<b>DELETED</b>		
11. A high standard of police and fire protection shall be maintained and expanded as needed.	<b>DELETED</b>		
12. The City shall coordinate efforts with the contracted disposal service to assure that the solid waste disposal needs in the community are being met in a most cost efficient and energy conserving manner.	<b>DELETED</b>		
13. The City shall promote recycling of solid waste materials.	<b>DELETED</b>		
14. The City shall encourage the Chemeketa Region Solid Waste Management Program to provide policy and implementation alternatives for an effective solid waste program.	<b>DELETED</b>		
15. The City shall coordinate with Yamhill County on all solid waste management decisions by the City of Carlton.	<b>DELETED</b>		
16. The City shall review land use applications relating to commercial/industrial activities to assure TMDL's are not exceeded at the City's point of wastewater discharge.	<b>DELETED</b>		
17. The City shall periodically review its Wastewater Plan, Water Plan, and Storm Drainage Plan as needed but no less than once every five years. If the review finds a plan to be deficient, it shall be updated.	<b>DELETED</b>		
<b>TRANSPORTATION</b>		<b>12. TRANSPORTATION</b>	
<b>Goal 1</b>		<b>Goal</b>	
		To provide and encourage a safe, convenient, and economic transportation system.	
<b>Preserve the function, capacity, level of service, and safety of State Highway 47.</b>	<b>DELETED</b>		
<b>Policies</b>		<b>Policies</b>	
		1. Plan for a multi-modal transportation system accessible for all users. 1A. Make investments to accommodate multi-modal traffic on major and minor arterial roads. 1B. Inventory bicycle and pedestrian networks and plan for needed infrastructure improvements.	

		2. Establish and design facilities that improve safety of all users of the transportation system. 2A. Identify and implement ways to minimize conflicts between diferent modes of travel.	<b>NEW</b>
		3. Support improvements that make downtown inviting and access to businesses safe and convenient for pedestrians and bicycles.	
A. The City shall coordinate all transportation-related activities impacting Highway 47 with the Oregon Department of Transportation.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 6.		
B. The City shall conform to Oregon Department of Transportation standards and practices with transportation issues concerning Highway 47.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 4.	4. Coordinate facility improvements and services with regional partners such as Yamhill County and Oregon Department of Transportation (ODOT).	
C. The City shall coordinate with the Oregon Department of Transportation on all land use decisions impacting Highway 47.			
D. The City shall work with the Oregon Department of Transportation to further refine and implement the Highway 47 transportation improvements identified in the Transportation System Plan.			
		5. Explore opportunities to provide or participate in local or regional public transit programs to provide transportation services to local residents.	
		6. Preserve the function, capacity, level of service, and safety of State Highway 47. 6A. Coordinate all transportation-related activities impacting Highway 47 with the Oregon ODOT. 6B. Coordinate with ODOT on all land use decisions impacting Highway 47. 6C. Conform to ODOT standards and practices with transportation issues concerning Highway 47.	
<b>Goal 2</b>			
<b>Enhance the transportation mobility and safety of the local street system.</b>	<b>MODIFIED:</b> Language simplified and absorbed into Goal 1.		
<b>Policies</b>			
A. Approval Processes for Transportation Facilities The following policies relate to the approval process for transportation facilities:			
1. The Transportation System Plan is an element of the City's Comprehensive Plan. It identifies the general location of transportation improvements. When a specific alignment is selected for proposed public road and highway projects it shall be permitted without a plan amendment if the new alignment falls within a transportation corridor identified in the Transportation System Plan.			

<p>2. Except where specifically regulated, the operation, maintenance, repair, and preservation of existing transportation facilities shall be allowed without land use review when, under ordinary circumstances they do not have a significant impact on land use.</p>			
<p>3. Except where specifically regulated, the dedication of right-of-way, authorization of construction and the construction of facilities and improvements, for improvements designated in the Transportation System Plan, and for improvement that are consistent with clear and objective dimensional standards, shall be allowed without land use review. The classification of the roadway and approval of road standards shall be in accordance with appropriate procedures.</p>	<p><b>DELETED</b></p>		
<p>4. Changes in the frequency of transit services that are consistent with the Transportation System Plan and that under ordinary circumstances do not have a significant impact on land use shall be allowed without land use review.</p>			
<p>5. For State projects that require an Environmental Impact Study (EIS) or Environmental Assessment (EA), the draft EIS or EA shall serve as the documentation for local land use review, if local review is required. Where the project is not consistent with the Transportation System Plan, formal review of the draft EIS or EA and concurrent completion of necessary goal exceptions or plan amendments shall occur prior to project commencement.</p>			
<p><b>B. Protection of Transportation Facilities</b></p>			
<p>1. The City shall protect the function of existing and planned roadways as identified in the Transportation System Plan.</p>			
<p>2. The City shall include a consideration of the impact of proposed development on existing and planned transportation facilities in all land use decisions.</p>			
<p>3. The City shall protect the function of existing or planned roadways and roadway corridors through the application of appropriate land use regulations.</p>			
<p>4. The City shall consider the potential to establish or maintain accessways, sidewalks, walkways, paths, and trails prior to the vacation of any public easement or right-of-way.</p>	<p><b>DELETED</b></p>		
<p>5. The City shall preserve right-of-way for existing and planned transportation facilities through exactions, voluntary dedication, and setbacks.</p>			
<p>6. The City shall coordinate with ODOT and the railroad owners/operators to preserve the railroad right-of-way for future rail service.</p>			

<p>7. The review of development applications and associated conditions of approval for right-of-way dedications and street improvements shall consider the impact of the development and rough proportionality through an individual determination.</p>			
<p>C. The local street plan in the Transportation System Plan shall be implemented by local developments. The local street plan identifies general alignments of future local streets and maintains a grid system whenever possible. Developers shall be required to follow the local street plan. Flexibility is allowed only as the proposed modifications still meet the integrity of the overall local street plan and circulation objectives. Any modifications to the local street plan shall be in accordance with the appropriate land use application for the modification proposed. The decision for modification shall be based on the criteria for the appropriate land use application and whether the integrity of the overall local street plan is still met and circulation objectives can still be achieved.</p>	<p><b>DELETED</b></p>		
<p>D. Railroad Crossing          In the event a developer is unable to acquire the necessary right-of-way and permission to cross the Union Pacific Railroad right-of-way, for the purposes of street extensions as shown in the City’s Transportation System Plan, after good faith attempts, then the City shall consider proceeding to acquire such right-of-way through the exercise of the City’s power of eminent domain. The street extension must serve proposed uses which are permitted under the City Zoning Code, and for which preliminary plat approval has been granted if required.</p> <p>The City shall keep account of time and expenses incurred in acquiring said right-of-way, including court costs, and the developer shall pay all such expenses, together with the amount of judgement or settlement, as a condition of issuance of construction permits. The City may require the posting of a cash bond, or other security acceptable to the City, to cover the estimated costs of the proceeding and costs for compensation to the owner of the railroad right-of-way.</p> <p>Any settlement of condemnation action must be concurred in by the developer. In the event the developer decides to abandon the development, the developer shall pay to the City all costs incurred in preparing for and prosecuting the condemnation action.</p> <p>All rights-of-way acquired by the developer, or for the developer, shall be dedicated to the City prior to construction of any street.</p>	<p><b>DELETED</b></p>		
<p><b>Goal 3</b></p>			



<p>Increase the use of alternative modes of transportation (walking, bicycling, rideshare/carpooling, and transit) through improved access, safety, and service. Increasing the use of alternative transportation modes includes maximizing the level of access to all social, work, and welfare resources for the transportation disadvantaged. The City of Carlton seeks for its transportation disadvantaged citizens the creation of a customer-oriented regionally coordinated public transit system that is efficient, effective, and founded on present and future needs.</p>	<p><b>DELETED</b></p>		
<p><b>Policies</b></p>			
<p>A. Pedestrian and Bicycle Circulation</p>	<p><b>MODIFIED:</b> Some language incorporated into Policy 1.</p>		
<p>1. The City shall maintain and implement the Transportation System Plan’s network of streets, access-ways, and other improvements, including bikeways, sidewalks, and safe street crossings to promote safe and convenient bicycle and pedestrian circulation within the community.</p>			
<p>2. The City shall require streets and access ways where appropriate to provide direct and convenient access to major activity centers, including downtown, schools, shopping areas, and community centers.</p>			
<p>3. The City shall maintain and implement the Transportation System Plan’s sidewalk improvement plan to develop the pedestrian system. Included within the pedestrian plan is a priority system that shall be followed.</p>			
<p>4. Bicycle facilities on local streets shall be shared facilities with general traffic since local street traffic volumes are low and narrow local roads create a hardship in the development of exclusive bike lanes.</p>			
<p>5. Retrofitting existing arterials and collectors within the Urban Growth Boundary with bike lanes shall be considered only when deemed appropriate and practical by the City Council.</p>			
<p>6. The development of bike lanes shall be considered for all new arterials and collectors within the Urban Growth Boundary. Consideration of the development of bike lanes shall be based on availability of right-of-way and financial ability.</p>			
<p>7. Where practicable, bikeways and pedestrian accessways shall connect to local and regional travel routes.</p>			
<p>8. Bikeways and pedestrian access ways shall be designed and constructed to minimize potential conflicts between transportation modes. Design and construction of such facilities shall follow the guidelines established by the Oregon Bicycle and Pedestrian Plan.</p>			
<p>9. Bicycle parking facilities shall be provided at all new residential multifamily developments of four units or more, commercial, industrial, recreational, and institutional facilities.</p>			
<p>10. The City will coordinate with the Yamhill-Carlton School District to develop and promote the use of safe and convenient pedestrian and bicycle facilities to the elementary school and high school bus stops.</p>			
<p>B. Transit</p>			

<p>1. Supporting the continued operation of existing public transit services is a priority.</p>			
<p>2. The City shall support efforts to coordinate with governmental and private agencies in the planning and provision of public transportation services and support a regional program to improve services, particularly for the transportation disadvantaged.</p>	<p><b>MODIFIED:</b> Some language incorporated into Policies 4 and 5.</p>		
<p>3. The City will cooperate with Yamhill County and other agencies in expanding public transit opportunities, including bus and rail.</p>			
<p>4. The City will coordinate with other jurisdictions when the need for park-and-ride facilities is studied.</p>			
<p>5. The City will coordinate with local businesses to increase transit and shuttle service and the use of park-and-ride and overflow parking lots during special events such as festivals and peak wine tasting events.</p>			
<p><b>Goal 4</b></p>			
<p><b>Improve coordination between the City of Carlton, Yamhill County, and the Oregon Department of Transportation (ODOT)</b></p>			
<p><b>Policies</b></p>			
<p>A. The City shall coordinate with the Oregon Department of Transportation to implement the highway improvements listed in the Statewide Transportation Improvement Program (STIP) that are consistent with the Transportation System Plan and comprehensive plan.</p>	<p><b>MODIFIED:</b> Wording simplified and incorporated into Policies 3 and 6.</p>		
<p>B. The City shall consider the findings of ODOT's draft Environmental Impact Statements and Environmental Assessments as an integral part of the land use decision-making procedures if the documents are received in a timely manner for review by the City of Carlton. A timely manner shall constitute a minimum time frame of 45 days for review and comment by the City of Carlton. Other actions required, such as a goal exception or plan amendment, will be combined with review of the draft EA or EIS and land use approval process.</p>			
<p><b>ENERGY</b></p>		<p><b>13. ENERGY CONSERVATION</b></p>	
<p><b>Goal</b></p>		<p><b>Goal</b></p>	
<p>1. To conserve existing energy resources and develop alternative sources to ensure that an adequate future energy supply will be available to Carlton's citizens at a reasonable cost.</p>	<p><b>MODIFIED:</b> Language simplified in Goal 1.</p>	<p>To conserve existing energy resources and develop alternative sources.</p>	
<p><b>Policies</b></p>		<p><b>Policies</b></p>	
<p>1. The City shall request assistance from appropriate agencies, when necessary; to evaluate energy considerations for planned development.</p>	<p><b>DELETED</b></p>		
<p>2. The City shall solicit support for and otherwise encourage the weatherization of existing structures to minimize health and economic impacts due to rising fuel prices.</p>	<p><b>DELETED</b></p>		

3. The City shall encourage the siting, design and layout of structures that minimize the electrical and fossil fuel energy consumed by these structures.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 1.	1. Encourage energy conservation and climate resiliency in new development through site planning, drought and fire-resistant landscaping, stormwater mitigation, and construction practices that take advantage of climatic conditions of light, heat, cooling, and ventilation.	
		2. Encourage land use patterns that locate various land use activities (residential, employment, recreation, education, etc.) within close proximity. 2A. Promote mixed-use development and increased densities near activity centers and along major transportation routes.	<b>NEW</b>
4. The City shall, when feasible and practical, solicit support for renewable and indigenous energy sources, including but not limited to wood, solar and wind.	<b>DELETED</b>		
5. The City shall encourage landscaping which provides summer shade to structures and paved areas, protection-from winter winds and access to solar radiation.	<b>DELETED</b>		
6. Special consideration shall be paid to avoiding landscape/tree conflict with overhead lines.	<b>DELETED</b>		
7. Power lines should be encouraged to be established underground whenever possible.	<b>DELETED</b>		
8. The City shall promote preservation of solar rights through encouragement of proper development planning.	<b>DELETED</b>		
9. The City shall encourage a tree-planting program consistent with preservation of solar rights and shall request assistance to evaluate landscape potential for new development.	<b>DELETED</b>		
10. The City shall encourage developments that contain provisions for energy efficiency and/or retain options for future considerations of renewable sources of energy.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 3.	3. Plan and solicit support for renewable energy sources.	
11. The City shall encourage new housing developments that provide for natural design opportunities, including but not limited to, the use of solar energy, and natural drainage patterns.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 3.	3A. Promote the design and development of public facilities and housing developments to take advantage of solar energy and co-generation.	
12. The City shall encourage the use of innovative design and development techniques which will save energy in new residential and commercial structures.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 1.		
13. The City shall request assistance to inventory local potential for natural, renewable and unique sources of energy. Special consideration shall be paid to utilizing the small-scale hydroelectric potential of Carlton Lake if the Lake is re-established, and utilizing methane gas potential of the Carlton sewage system.	<b>DELETED</b>		
14. The City shall request assistance to inventory current energy uses.	<b>DELETED</b>		
15. The City shall request assistance to account for changes in energy supply and price when updated housing and employment projections are made.	<b>DELETED</b>		
<b>URBANIZATION</b>		<b>14. URBANIZATION</b>	
<b>Goal</b>		<b>Goal</b>	
1. To provide for an orderly and efficient transition from rural to urban land use.	<b>RETAINED</b>	To provide for an orderly and efficient transition from rural to urban land use.	

Policies		Policies	
1. The City shall define a growth policy consistent with population projections and expectations and identify possible future development areas on the Plan map.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 1 .		
2. Change of the Urban Growth Boundary shall be based upon consideration of the following factors:  (a) Demonstrated need to accommodate long-range urban population growth requirements, (b) Need for housing, employment opportunities and livability, (c) Orderly and-economic provision of public facilities and services, (d) Maximum efficiency of land uses within and on the fringe of existing urban area, (e) Compatibility between the proposed urban uses and nearby agricultural activities, and (f) Environmental, energy, social and economic consequences.	<b>MODIFIED:</b> Language simplified and absorbed into Policy 1 .	1. Update and expand the urban growth boundary when conditions exist that satisfy adopted local and state standards for amendments to urban growth boundaries.	
3. The City shall encourage the availability of sufficient land for various urban uses to ensure choices in the market place.	<b>DELETED</b>		
4. The size of the parcels of urbanizable land that are converted or developed shall be of adequate dimension to maximize the utility of land resources and to enable the logical extension of services to the parcels.	<b>DELETED</b>		
5. Methods and devices for guiding urban land use should include but not be limited to the following as they become feasible: (a) Tax incentives and disincentives, (b) Multiple use and joint development practices, (c) Fee and less than fee acquisition techniques, and (d) Capital improvement programming.	<b>DELETED</b>		
7. The City shall investigate the use of growth management techniques to promote a reasonable rate of growth consistent with the availability of public facilities and services and the fiscal ability of the City to provide public facilities and services.	<b>DELETED</b>		
8. The City shall require new developments to pay all costs of capital improvements to that development.	<b>DELETED</b>		
9. Encourage the location of housing to minimize the consumption of prime agricultural land and other areas of natural resource that contribute to the community's rural character.	<b>RETAINED:</b> Same as Policy 2.	2. Encourage the location of housing to minimize the consumption of prime agricultural land and other areas of natural resources that contribute to the community's rural character.	
10. Development shall avoid locating in areas, which are subject to, and/or generate adverse environmental impacts.	<b>DELETED</b>		
11. Development shall be encouraged to utilize vacant parcels of bypassed land in order to achieve a more compact community.	<b>MODIFIED:</b> Language simplified but similar to Policy 3.	3. Encourage infill development to utilize vacant parcels and achieve a more compact community.	

	4. Use intergovernmental agreements with Yamhill County and other public agencies as needed to establish areas of mutual interest and coordination procedures relative to urban growth management.	<b>NEW</b>
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# Oregon

Tina Kotek, Governor

## Department of Land Conservation and Development

635 Capitol Street NE, Suite 150

Salem, Oregon 97301-2540

Phone: 503-373-0050

Fax: 503-378-5518

[www.oregon.gov/LCD](http://www.oregon.gov/LCD)

March 7, 2024

Scott Whyte, Associate Planner  
Mid-Willamette Valley Council of Governments  
100 High St. SE, Suite 200  
Salem, OR 97301



By Email: [SWhyte@mwvcog.org](mailto:SWhyte@mwvcog.org)

**RE: Comments on PAPA DLCD File No. 001-24, or ID #29433**

Dear Mr. Whyte,

Thank you for the opportunity to comment on the above referenced application. We have reviewed the materials submitted as part of the Post-Acknowledgement Plan Amendment DLCD File No. 001-24, and would like to submit the following comments for the record:

### **Context and Comment Introduction**

DLCD would like to commend the City and project team on the overall work effort and public outreach that has gone into such a significant Comprehensive Plan update project. Regular reviews and updates to a city's Comprehensive Plan keep them consistent with the changing needs and desires of the public they are designed to serve and fulfill Statewide Planning Goal 2 (land use planning) requirements as well as the City's obligations under and 197.175 (2)(a). DLCD supports your efforts to update your local planning documents, pursuant to the appropriate process laid out in state law. However, we would like to offer some recommendations regarding the City's proposed replacement Comprehensive Plan to ensure consistency with statewide planning Goals 2, 5, 6 and 7.

DLCD's recommendations are offered in the context of Statewide Planning Goal 2, which requires a Comprehensive Plan to contain a factual basis, including inventories and other forms of data for the plan, as well as elements that correspond to applicable statewide planning goals. Specifically, state law requires all land use plans to include identification of issues and problems, inventories and other factual information for each applicable Statewide Planning Goal, evaluation of alternative courses of action and ultimate policy choices, taking into consideration social, economic, energy and environmental needs. The plans are the basis for specific implementation measures and, as such, need to be supported by adequate factual inventories/data to ensure a defensible land use planning construct for local governments when they are making land use decisions.



### Goal 5 Recommendations

Statewide Planning Goal 5 requires local governments to adopt programs that will protect natural resources and conserve scenic, historic, and open space resources for present and future generations. These resources promote a healthy environment and natural landscape that contributes to Oregon's livability. The "Goal 5 Process" starts with an inventory of Goal 5 resources. Resource sites are assessed and significant sites are protected. Rules for some Goal 5 resource categories rely on inventories and assessments that have been conducted by state or federal entities.

There are separate state rules for each Goal 5 resource category. Many of the rules have not been revised since 1996 and rely on periodic review as a trigger for compliance. Since many jurisdictions are no longer required to enter into periodic review, many local plans and codes are not consistent with the current Goal 5 standards.

As such, in order to maintain compliance with Goal 5 resource protections for those resources already inventoried and acknowledged in the City, we recommend the following changes to the currently proposed Comprehensive Plan update:

- Retention, and not deletion, of the following acknowledged policy:

*4. If archeological sites are identified in the City, the City will coordinate with the State Historic Preservation Office in establishing a review procedure that meets the requirements of Administrative Rule 660-16-025.*

- Addition of a policy recognizing the OAR 660-023-0200 requirement to apply baseline protections (OAR 660-0200(8)) to sites on the National Register of Historic Places.
- In terms of any proposed modifications/deletions to the acknowledged Fish and Wildlife resources background information, we recommend that the City receive ODFW's input before proceeding with adoption.
- Either retention of the acknowledged policy below OR replacement with an informed policy about the importance of vegetated riparian areas to stream health.

*2. Efforts shall be made to preserve creeks and floodplain areas as open space. These areas shall be maintained to provide a natural storm water and drainage system. Bicycle and pedestrian pathways should be examined for possible inclusion in these areas.*

- Addition of a policy recognizing the City's statutory obligation under ORS 227.350 to provide notice to the Department of State Lands if development or a land division is in the vicinity of a wetland or an area of predominantly hydric soils, shown on the State Wetlands Inventory. The department also recommends inclusion of an associated policy

about preserving the water quality, ground water recharge, and flood storage functions of wetlands.

### Goal 6 Recommendations

Unlike Goal 5, Goal 6 does not have administrative rules to set standards for meeting the goal. Instead, it relies on other state and federal regulations for direction and implementation. However, for water quality purposes, Goal 6 has the potential for being the most important land use planning goal. The Goal requires that “all waste and process discharges from future development, when combined with such discharges from existing developments shall not threaten to violate, or violate applicable state or federal environmental quality statutes, rules and standards.” The Goal includes a series of “guidelines” for developing comprehensive plans such as designating sites for controlling pollution, buffering and separating land uses that lead to impacts upon water resources, and considering the planning area’s carrying capacity for water resources.

State definitions for wastewater and pollutants include pollutants carried by stormwater and impacts on habitat that result from stormwater flows. Temperature loading to surface waters due to loss of riparian vegetation is also a water quality issue. Goal 6 requires jurisdictions to integrate compliance with federal and state water quality regulations with their comprehensive planning process.

Goal 6 can be used to justify local actions or possibly require local actions when development activity or allowed land uses pose a threat to federal or state protected water resources. The Department of Environmental Quality’s identification of a water quality limited stream reach and adoption by of an associated Total Maximum Daily Load (TMDL) implementation plan can trigger a requirement for local actions. A local government must make findings specifying what is required to meet the objectives of Goal 6. Such findings can be informed by federal and state standards.

As such, for compliance with Goal 6 in the proposed updated Comprehensive Plan, we recommend addition of the attached factual background information and the policies below:

- *All development within the City of Carlton shall comply with applicable state and federal water quality regulations.*
- *If waterways within the City of Carlton are declared water quality limited by the DEQ, the City will respond to directives issued in a TMDL Implementation Plan.*

### Goal 7 Recommendations

In the context of natural hazards, Goals 2 and 7 impose several broad requirements on local governments. These statewide planning goals establish an obligation for local governments to:

- (1) Develop inventories of hazardous areas;

- (2) Adopt policies which prohibit development “in known areas of natural disasters and hazards without appropriate safeguards”;
- (3) Enact land use regulations based on those inventories and comprehensive plan policies to protect life and property from losses associated with development in hazard areas; and
- (4) Update inventories, policies, and land use regulations on a periodic basis to reflect new information, new laws and goal requirements, and changing circumstances in the community.

DLCD staff is concerned that the proposed deletion and significant modification of the acknowledged natural hazard policies in the City’s Comprehensive Plan, without an associated update of the factual basis and hazard inventory data required in Goals 2 and 7, would be inconsistent with the required process in state law for natural hazards planning.

Natural hazards listed in Goal 7 relevant to the city of Carlton are floods, landslides (slope/soil hazards), earthquakes and related hazards, and wildfires. Local governments may also identify and plan for other natural hazards. The DLCD Natural Hazards Mitigation Planning specialist noted that the City has identified severe weather and volcanic hazards in the City of Carlton Addendum to the Yamhill County Multi-Jurisdictional Natural Hazards Mitigation Plan (NHMP). The City should also address these hazards in its Comprehensive Plan for Goal 7 compliance.

In total, City of Carlton’s NHMP identifies potential impacts by six individual hazards. The NHMP includes plans for mitigating these impacts. Therefore, amendments to this section would logically describe inventories, policies, and implementing measures for each of these hazards. When amending its plan, the City is expected to (1) review the quality of the acknowledged factual basis, (2) update factual information as needed, and (3) update Comprehensive Plan policies to focus on reducing vulnerability to, people and property in accordance with the goal. The best available data for an update can typically be found in the NHMP. This should include the latest maps/data for each of the hazards so they can be used as the basis for local regulation to reduce vulnerability of people and property to the impacts of natural hazards. Additionally, since Goals 2 and 7 also obligate the City to adopt implementing measures, we recommend the city include a policy committing itself to adopting code provision that reduce vulnerability of people and property to the six identified natural hazards.

Since the City’s NHMP was approved in 2020, FEMA has come out with new requirements for local government NHMPs. They include addressing socially vulnerable populations and underserved communities; addressing equity; addressing community lifelines;<sup>1</sup> considering the impacts of climate change; and addressing any High Hazard Potential Dams within or potentially impacting the City.<sup>2</sup> The City’s current NHMP does address a few lifelines (Roads/Seismic

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<sup>1</sup> Community Lifelines | FEMA.gov

<sup>2</sup> “Those dams where failure or mis-operation will probably cause loss of human life.” (Hazard Potential Classification System for Dams, FEMA/ICODS, 2004.)

Lifelines, Bridges, and Utility Lifelines) and will need to address all of these topics with the next update, due before January 19, 2026, to obtain Federal Emergency Management Agency (FEMA) approval of the updated NHMP. Addressing these topics with this Comprehensive Plan Update to Goal 7 policies/factual basis would position the City well for the coming NHMP update. Having a FEMA-approved NHMP would also open up certain federal mitigation funding opportunities for the City.

If the City does not want to proceed with incorporating applicable NHMP policies into the Comprehensive Plan at this time, updating the factual basis with current natural hazards maps, inventory and data, and the other recommendations in this section, DLCD recommends retaining the acknowledged natural hazard policies, inventory, and data in the background documents until the city completes an update consistent with the Goal 2 and 7 update process.

DLCD acknowledges that update efforts can be expensive and time consuming, especially for smaller cities. The following information on funding opportunities that support natural hazards projects and planning is provided for your reference.

- FEMA<sup>3</sup>'s Building Resilient Infrastructure and Communities (BRIC) Grant Program. For more information please reach out to Jon Wiebe, Deputy State Hazard Mitigation Officer, [jon.wiebe@oem.oregon.gov](mailto:jon.wiebe@oem.oregon.gov).
- FEMA's Flood Mitigation Assistance (FMA) Program. For more information, please reach out to Jon Wiebe, Deputy State Hazard Mitigation Officer, [jon.wiebe@oem.oregon.gov](mailto:jon.wiebe@oem.oregon.gov).
- FEMA's Hazard Mitigation Grant Program (HMGP). For more information, please reach out to Anna Feigum, Deputy State Hazard Mitigation Officer, [anna.r.feigum@oem.oregon.gov](mailto:anna.r.feigum@oem.oregon.gov).
- DLCD's Technical Assistance Grant. For more information, please visit [DLCD's Community Grants web page](#).
- DLCD's Periodic Review Grant. For more information, please visit [DLCD's Community Grants web page](#).

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<sup>3</sup> The FEMA grants require the City to have a current, FEMA-approved NHMP.

PAPA review for City of Carlton, DLCD File# 001-24  
March 7<sup>th</sup>, 2024  
Page 6 of 6

Please feel free to contact me if you have any questions or would like to discuss DLCD's comments on this Post-Acknowledgement Plan Amendment further. I can be reached by telephone at 503-779-9821 or by email at [melissa.ahrens@dlcd.oregon.gov](mailto:melissa.ahrens@dlcd.oregon.gov).

Respectfully,

A handwritten signature in blue ink, appearing to read 'Melissa Ahrens', written in a cursive style.

Melissa Ahrens  
Mid-Willamette Valley Regional Representative  
Oregon Department of Land Conservation and Development

CC:  
Shannon Beaucaire, City Manager, City of Carlton  
Aimee Amerson, City Recorder, City of Carlton  
Steve Faust, 3J Consulting

Recommended Goal 6 Factual Background Information:

The Federal Clean Water Act requires streams, rivers, lakes, and estuaries that appear on the 303(d) list be managed to meet State water quality standards. According to the most recent Section 303(d) List of Water Quality Limited Water bodies published by DEQ, the following waterways within [jurisdiction] are water quality limited for the parameter(s) listed and, therefore, do not comply with state water quality standards:

Jurisdiction has been named as a Designated Management Agency (DMA) in the [name TMDL document] and given a pollutant load allocation for [name pollutant]. This load allocation represents a [state percentage] reduction from current levels. A significant portion of this load reduction must be achieved through changes in development practices. [Repeat finding as necessary for each pollutant].

The DEQ definition of wastewater includes both point and non-point sources. Wastewater from a point source comes from a discernable or discrete conveyance such as a pipe, ditch, or channel. Non-point source wastewater is from overland flow, which does not generally follow a defined channel, and includes stormwater. Water pollution in the [jurisdiction] results from both point sources and non-point sources.

Reduction of open space, removal of vegetative cover, and development that increases the amount of impervious surfaces can contribute significantly to increases in the volume and peak flows of stormwater and decreases in water quality.

Offsetting measures can reduce the negative effects of urban development on water quality and quantity. Examples include reduction of stormwater runoff or maximization of infiltration, inclusion of landscaped buffer strips adjacent to new development, protection of floodplains, preservation and improvement of streamside vegetation along watercourses and in wetlands, and other development best management practices (BMPs).



Scott Whyte

**From:** WILLIAMS Brandon <Brandon.WILLIAMS@odot.oregon.gov>  
**Sent:** Monday, March 11, 2024 3:18 PM  
**To:** Scott Whyte  
**Cc:** aamerson@ci.carlton.or.us; KNECHT Casey; ODOT Reg 2 Planning Manager  
**Subject:** City Case file LA 2024-01 (Carlton comprehensive plan amendment)  
**Attachments:** Received in the mail-Carlton.pdf

External: Please report suspicious email to [security@wesd.org](mailto:security@wesd.org)

Dear Scott Whyte,

Thank you for the opportunity to comment on the attached notice regarding the City of Carlton Comprehensive Plan Amendment, case LA 2024-01. ODOT has jurisdiction of OR-47, a state highway facility, so this notice was routed for my review as the ODOT Region Planner for your area.

ODOT has no objections to the amendment as proposed, though we do have some *recommendations* regarding policy language related to coordination with ODOT. Specifically, the bulleted statements below were shown as “deleted” or “modified” in the Comprehensive Plan Table Matrix (Transportation section), but I just want to make sure we are not leaving out important detail about coordination needed in development-review roles, or other projects:

Should be Goal 12 SW

- Goal 1: Preserve the *function, capacity, level of service, and safety* of State Highway 47
- Policy A. The City shall *coordinate all transportation-related activities impacting Highway 47* with the Oregon Department of Transportation.
- Policy B. The City shall *conform to Oregon Department of Transportation standards and practices with transportation issues concerning Highway 47.*
- Policy C. The City shall *coordinate with the Oregon Department of Transportation on all land use decisions impacting Highway 47.*

Please *reconsider* the removal of the above language from your comprehensive plan. The language adds important detail about how the State and City of Carlton should coordinate together related to new developments (assessing significant impact, and potential mitigation) and transportation projects as well. The new language leaves out much of this important detail.

Please note that future land-use proposals and other development-review requests can be sent electronically to ODOT’s development-review inbox at: [ODOTR2PLANMGR@odot.oregon.gov](mailto:ODOTR2PLANMGR@odot.oregon.gov).

Please let me know if you have any questions.

Thank you,  
Brandon

Brandon Williams – He/Him/His  
 Senior Transportation Planner | ODOT Region 2  
 Area 3 | Polk, Marion & Yamhill Counties  
[Brandon.WILLIAMS@odot.oregon.gov](mailto:Brandon.WILLIAMS@odot.oregon.gov)

**ORDINANCE 2024-750**

**AN ORDINANCE AMENDING THE CARLTON COMPREHENSIVE PLAN IN ITS ENTIRETY AND ADOPTING THE AMENDED COMPREHENSIVE PLAN**

**WHEREAS**, the City of Carlton deemed it necessary to update its Comprehensive Plan, initially adopted in 2000 and last amended in 2009; and

**WHEREAS**, beginning in December of 2021, the City began the necessary work to update the Comprehensive Plan, which included robust community engagement and the support of a consultant to facilitate the necessary background reports and technical research and analysis; and

**WHEREAS**, the City has prepared a proposed major text amendment to the Carlton Comprehensive Plan, replacing the previously adopted Plan in its entirety, which establishes the City's land use goals and policies; and

**WHEREAS**, as required by statute, notice of a public hearing on the adoption of the updated Comprehensive Plan was published in the News Register and was otherwise provided to the public as is required; and

**WHEREAS**, the Carlton Planning Commission held a public hearing on the updated Comprehensive Plan on March 11, 2024, at which time the public was given full opportunity to be present and heard on the matter; and

**WHEREAS**, the Carlton Planning Commission passed a motion recommending that the Carlton City Council adopt the updated Comprehensive Plan; and

**WHEREAS**, the Carlton City Council held a public hearing on the adoption of the updated Comprehensive Plan on April 2, 2024, at which time the public was given full opportunity to be present and heard on the matter; and

**WHEREAS**, following the public hearing and further Council deliberation, including the opportunity to ask questions of City staff, the Council desires to adopt the updated Comprehensive Plan.

**NOW THEREFORE, BE IT ORDAINED AND ENACTED BY THE CITY COUNCIL OF THE CITY OF CARLTON, OREGON, as follows:**

**Section 1.** The updated Comprehensive Plan for the City of Carlton, attached as Exhibit A, is hereby adopted.

**Section 2.** This Ordinance shall go into effect on the thirtieth day following its adoption by the Carlton City Council.

**ADOPTED** by the City Council of the City of Carlton, Oregon, on May \_\_\_\_, 2024, by the following votes:

AYES: \_\_\_\_\_

NAYS: \_\_\_\_\_

ABSENT: \_\_\_\_\_

ABSTAIN: \_\_\_\_\_

\_\_\_\_\_  
Linda Watkins, Mayor

ATTEST:

\_\_\_\_\_  
Aimee Amerson, City Recorder



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## Memorandum

**To:** The Mayor and Members of the City Council  
**From:** Tyler C. Yeoman-Millette, City Attorney  
**Subject:** Establishment of Nomination Procedure – 2<sup>nd</sup> Reading  
**Council Goal:** Goal 4: Good Governance  
**Date:** April 2, 2024

## Recommendation

After review and discussion, it is recommended that Council consider the following motions:

1. It is moved that the City Council authorize the 2<sup>nd</sup> reading of Ordinance 2024-749 by title only. *(Majority Vote)*
2. It is moved that the City Council accept the 2<sup>nd</sup> reading of Ordinance 2024-749. *(Roll Call Vote)*

## Background

At the March 5, 2024, Council Meeting, the Council had the 1<sup>st</sup> reading of Ordinance 2024-749. It is presented to the Mayor and Council tonight for the second and final reading.

## Exhibits

1. March 5, 2024 Memorandum
2. Carlton Ordinance No. 2024-749



**To:** The Mayor and Members of the City Council  
**From:** Tyler C. Yeoman-Millette, City Attorney  
**Subject:** Establishment of Nomination Procedure  
**Date:** March 5, 2024

### **Background and Discussion**

In 2022, the Carlton voters approved the proposed amendments to the City Charter. Included in the revised language of the Charter is the requirement that the City Council adopt an ordinance which establishes the procedure to nominate an individual for City elected office.

In reviewing other smaller Cities' nomination procedures, the most common code provisions adopted the applicable state law – either by reference or by codifying the same or similar language as is included in the statute. The attached Ordinance proposes the adoption of state election laws by reference, which provides the flexibility in the future to stay consistent with any changes to the state election laws without the need to update any provisions of the Carlton Municipal Code.

We will hold the 1<sup>st</sup> reading of the Ordinance at tonight's meeting, and the second and final reading will occur at the Council's April meeting.

### **Recommendation**

After review and discussion, it is recommended that Council consider the following motions:

1. It is moved that the City Council authorize the reading of Ordinance 2024-749 by title only.
2. It is moved that the City Council accept the 1<sup>st</sup> reading of Ordinance 2024-749.

### **Exhibits**

1. Carlton Ordinance No. 2024-749



## ORDINANCE 2024-749

### AN ORDINANCE ESTABLISHING CHAPTER 1.06 OF THE CARLTON MUNICIPAL CODE RELATING TO NOMINATIONS FOR CITY OFFICE

**WHEREAS**, the Carlton City Council referred a charter amendment referendum to the voters in 2022; and

**WHEREAS**, the referred charter amendment includes language which requires the Carlton City Council to adopt an ordinance that establishes the nomination procedures for the mayor and city council positions; and

**WHEREAS**, the November 2024 election is the first general election following the adoption of the revised charter; and

**WHEREAS**, in conformance with the charter language, and in preparation of the November 2024 general election, a new provision of the Carlton Municipal Code, Chapter 1.06, is attached hereto as Exhibit A, which establishes the nomination procedure for City elected office.

**NOW THEREFORE, BE IT ORDAINED AND ENACTED BY THE CITY COUNCIL OF THE CITY OF CARLTON, OREGON**, as follows:

**Section 1.** Carlton Municipal Code Chapter 1.06, entitled “Nominations”, is hereby established, as outlined in the attached Exhibit A.

**Section 2.** This Ordinance shall go into effect on the thirtieth day following its adoption by the Carlton City Council.

**ADOPTED** by the City Council of the City of Carlton, Oregon, on April \_\_\_\_, 2024, by the following votes:

AYES: \_\_\_\_\_

NAYS: \_\_\_\_\_

ABSENT: \_\_\_\_\_

ABSTAIN: \_\_\_\_\_

\_\_\_\_\_  
Linda Watkins, Mayor

ATTEST:

\_\_\_\_\_  
Aimee Amerson, City Recorder

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## Chapter 1.06 NOMINATIONS

### 1.06.010 Procedure

A. Nomination for mayor or a city councilor position shall be by petition, and the form of petition for nomination of a candidate shall be in the form designated by the Oregon Secretary of State.

B. Nominating petitions shall be filed for the general election only, and shall follow the filing deadlines established by the State of Oregon.

C. All procedures and provisions for the nomination and election of mayor and city council positions will be nonpartisan and without regard to political party. The State of Oregon election laws shall govern and apply in all instances where the provisions or procedures of nominations and/or elections of elective City officers are not expressly set forth herein, or in the City Charter.



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**To:** The Mayor and Members of the City Council  
**From:** Aimee Amerson, City Recorder  
**Subject:** FY 24/25 Community Grant Applications and Award  
**Council Goal:** Financial Sustainability  
**Date:** April 2, 2024

### **Recommended Motion**

It is MOVED that the City Council Community Grants to the following organizations in the amounts of: \_\_\_\_\_ and authorize the City Manager to issue the fund amounts as decided upon by the City Council.

### **Background**

The City of Carlton budgets funds for non-profit organizations every year called Community grants. Organizations can request funds that would then be used to continue to serve Carlton residents.

City staff opened the Community Grant application window on January 3rd and closed on March 15th. The Non-Profit organizations are asked to submit a completed application and a cover letter by the due date.

Staff has also structured the application submission schedule to open on the first business day of January of each year and remain open until March 15th. This allows all Non-Profit organizations the same window of opportunity to apply for a Community Grant. All grant requests will be on the April Council agenda of each year.

### **Alternatives**

1. Do not award any funds.

### **Exhibits**

- Blank Community Grant application
- Carlton Business Association application and letter
- With Courage application and letter
- Homeward Bound Pets application

## Exhibit 1



# City of Carlton Community Grant Program

The City of Carlton Community Grant program allows local non-profit and for-profit organizations to apply for funding to enhance the quality of life through events within the City of Carlton.

Community Organizations that are not designated non-profits must meet one of the following criteria to be eligible:

1. Provide early childhood education opportunities
2. Aids with essential utilities, food, clothing, or shelter
3. Improves the appearance or environmental quality of the community; or
4. Increases reuse and recycling opportunities

Applications must be submitted prior to the deadline date. A letter supporting the request is due with the application. The letter should include how the funds will be used and the potential benefits to the citizens.

Grants will not be considered for:

1. Political or religious gatherings or ceremonies
2. Events or activities designed solely to profit the organizing individual or company

### **Timeline**

Applications and grant guidelines will be available at City Hall and City website at [www.ci.carlton.or.us](http://www.ci.carlton.or.us). Requests will be considered annually by the City Council. The application opening date is January 5<sup>th</sup> of each year. The application closing date is March 15<sup>th</sup> each year. Completed applications must be postmarked or hand-delivered to City Hall by the due date. The City Council will review applications at the April City Council Meeting. Program funding will be determined as part of the annual budgeting process.

## **Determination Procedure and Application**

The City Council will determine the amount of funds to distribute to applicants based on the application and allotted budget.

An organization may be denied an award if previously awarded projects have not complied with these procedures and guidelines including lack of filing a financial report and/or program evaluation.

The City Council reserves the right to withhold reimbursement or request repayment to any applicant approved for grant money that misrepresented their application or has not utilized the funds in a manner consistent with their application.

## **Evaluation Criteria**

1. Applications will be considered based on evaluation criteria that include but is not limited to the following criteria and information provided above.
2. The number of community members served by the request
3. Types of community members served by request
4. Organization's history of success and financial stability





## APPLICATION FOR COMMUNITY GRANT

Applicant/Organization Name: \_\_\_\_\_

Event Date(s) and location: \_\_\_\_\_

Event/Activity Title: \_\_\_\_\_

Organization Information	
<b>Organization Type:</b>	<b>Federal Tax ID No:</b>
<input type="checkbox"/> Non-Profit 501C (3) <input type="checkbox"/> Other Non-Profit <input type="checkbox"/> For Profit Organization <input type="checkbox"/> Other	Describe organization type:

Authorized Signer	
<b>Print Name:</b>	
<b>Phone:</b>	<b>Fax:</b>
<b>Title:</b>	<b>Email:</b>
<b>Street Address:</b>	<b>Mailing Address:</b>

Contact Person	
<b>Print Name:</b>	
<b>Phone:</b>	<b>Fax:</b>
<b>Title:</b>	<b>Email:</b>
<b>Street Address:</b>	<b>Mailing Address:</b>

Describe your organization's history; if the event has happened before, tell its history.

Describe how the requested funds will be used:

How will you measure the success of your project?

What are your measurable goals?

Have you applied for a Community Grant previously? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, when did you last apply? \_\_\_\_\_

List any other sponsors/contributors and assistance they provide your organization.

What is the target audience? *(check all that apply)*

- Children (under 10 years)
- Youth (10 - 14 years)
- Teenagers (under 21 years)
- Adults
- Families
- Seniors

Provide a general budget summary for your event.



## Exhibit 2

Attention : City Council Members,

I am writing regarding the Carlton Business Associations request for funds to put towards Christmas in Carlton. Thank you for taking the time to consider my proposal. One of the most magical times of year in Carlton for our community and surrounding communities is Christmas and the month of December. This year we are looking to add some more magic. The Carlton Business Association have a wonderful working relationship with the city and enjoy working together to keep events ongoing for our community members and to bring business to our local businesses from other communities as well.

This year our proposal is to bring in some live reindeer for a few hours on the day of the Christmas tree lighting. We have had meetings with the city, and everyone is on board and excited at the possibility of bringing reindeer to Carlton. We have a space available where the reindeer can be for the day. The Carlton Business Association tries to have a community event every weekend in the month of December for community members, their families, and surrounding communities. We really believe that bringing in live reindeer for the day of the tree lighting would bring a magical experience for everyone and would draw many members from outside communities to help boost our tourism experience.

We have booked the reindeer in hopes of securing the funds to make it happen as you have to book far in advance. We would like to have the reindeer for a time of 5-7 hours in downtown Carlton. The cost would be between \$2875.00 and \$3625.00 depending on the time allotment we choose. As a non-profit we do not have all of the funds necessary to cover the costs of the reindeer ourselves and are hoping the city would help bridge the gap if available.

Again thank you for taking the time to consider our proposal. Please feel free to reach out to me with any questions.

Thank you,

Carrie Lawson

Vice President

Carlton Business Association



## APPLICATION FOR COMMUNITY GRANT

Applicant/Organization Name: Carlton Business Association

Event Date(s) and location: December 7, 2024 - Downtown Carlton

Event/Activity Title: Live Reindeer to kick off Christmas, same day at tree lighting.

Organization Information	
<b>Organization Type:</b> 501C 6	<b>Federal Tax ID No:</b> 26-1360351
<input type="checkbox"/> Non-Profit 501C (3) <input checked="" type="checkbox"/> Other Non-Profit <input type="checkbox"/> For Profit Organization <input type="checkbox"/> Other	<b>Describe organization type:</b>  <p style="font-size: small;">The CBA is an association of businesses and individuals, organized to promote the economic vitality of the greater Carlton business community, while preserving its civic, cultural and historic well-being.</p>

Authorized Signer	
<b>Print Name:</b> Carrie Lawson	
<b>Phone:</b> 503-537-8301	<b>Fax:</b>
<b>Title:</b> Vice President Christmas in Carlton Chair	<b>Email:</b> carrie@rainystaterealtor.com
<b>Street Address:</b> 230 S Park ST Carlton, OR 97111	<b>Mailing Address:</b> PO Box 224 Carlton, OR 97111

Contact Person	
<b>Print Name:</b> Carrie Lawson	
<b>Phone:</b> 503-537-8301	<b>Fax:</b>
<b>Title:</b> Vice President - Christmas in Carlton Chair	<b>Email:</b> carrie@rainystaterealtor.com
<b>Street Address:</b> 230 S Park ST Carlton, OR 97111	<b>Mailing Address:</b> PO Box 224 Carlton, OR 97111

Describe your organization's history; if the event has happened before, tell its history.

The Carlton Business Association was created in 2007. We have been putting on events through out the month of December for our community, businesses and others outside of our community to bring business to our community. We have been working directly with the city to make this event a success and combine it with their event for the Christmas tree lighting.

Requested fund amount

\$1500.00

Describe how the requested funds will be used:

The funds will be used to help pay for the rental of live reindeer to come to Carlton the day of our Christmas tree lighting. We want to expand on our event and make it something memorable not only for our community but our surround communitites as well. It would be a magical way to kick off the Christmas season in Carlton. Carlton is known for our amazing Christmas season and we look forward to expand on this .

How will you measure the success of your project?

Our success will be measured based on the turn out of people to see the reindeer. There is no cost associated for the community to come and see the live reindeer. It would be a free event that the community and other can come and participate in. We currently provide free hot chocolate to the community for the tree lighting as well.

What are your measurable goals?

Our measurable goal is to have more people attend the Christmas tree lighting event and spend more time downtown that day. One way to measure is to see how many cups of cocoa we hand out that day as well.

Have you applied for a Community Grant previously? Yes \_\_\_\_\_ No

If yes, when did you last apply? \_\_\_\_\_

List any other sponsors/contributors and assistance they provide your organization.

At this time we have no other sponsors for this event.

What is the target audience? (check all that apply)

- Children (under 10 years)
- Youth (10 - 14 years)
- Teenagers (under 21 years)
- Adults
- Families
- Seniors

Provide a general budget summary for your event.

We would have the reindeer for 5-7 hours. The total cost of reserving the reindeer would be \$2875.00 and \$3625.00 based on which way we go as far as hours we have them. The hot cocoa would be donated by the Carlton Business Association .



Exhibit 3

PO Box 411 Carlton, OR 97111

503-218-3703

withcourage.org

January 19, 2024

City of Carlton  
191 E Main St  
Carlton, OR 97111



Dear City of Carlton

With Courage is so grateful for your generous support in 2023. Because of donors like you we were able to directly impact the lives of over 160 Yamhill County women and their families this past year. Your support has helped us to continue to serve these families through care packages, online support groups, in person meet-ups and financial assistance. Your donation of \$2500 continues to support and increase our efforts in serving the local breast cancer community.

We are so humbled by the generosity of our community. With 2024 upon us, we are looking forward to continuing our mission of supporting families in Yamhill County who have been impacted by a breast cancer diagnosis.

Mark your calendar with our upcoming 2024 events. Sign up for our newsletter ([www.withcourage.org](http://www.withcourage.org)) and follow along with us on Facebook and Instagram for the most up to date information!

- Beyond Courageous – survivor event                      02/25/24
- Corn Hole Tournament    06/14/24
- Pink Light Campaign    10/1-10/31
- Liquid Courage Campaign    10/01-10/31
- 10<sup>th</sup> Annual Pink Ribbon Event    11/09/24

We hope as you create your charitable giving budget for 2024 you will consider including us on your list. We know that the number of excellent non-profits in our community is large and would be honored to receive your support.

Caitlin Sticka,  
Executive Director

With Courage is a 501(c)3 non-profit organization. No goods or services have been received in exchange for this donation. Tax ID 84-1911285.



City of Carlton  
 191 East Main Street  
 Carlton, OR 97111  
 ☎ 503-852-7575



## APPLICATION FOR COMMUNITY GRANT

Applicant/Organization Name: With Courage

Event Date(s) and location: Yamhill County

Event/Activity Title: Variety of care packages for patients in treatment for breast cancer

Organization Information	
<b>Organization Type:</b>	<b>Federal Tax ID No:</b> 84-1911285
<input checked="" type="checkbox"/> Non-Profit 501C (3) <input type="checkbox"/> Other Non-Profit <input type="checkbox"/> For Profit Organization <input type="checkbox"/> Other	Describe organization type: With Courage support families in Yamhill County impacted by a breast cancer diagnosis.

Authorized Signer	
<b>Print Name:</b> Caitlin Sticka	
<b>Phone:</b> 503-218-3703	<b>Fax:</b> N/A
<b>Title:</b> Executive Director	<b>Email:</b> Caitlin@withcourage.org
<b>Street Address:</b> 708 NE Baker St. McMinnville OR 97128	<b>Mailing Address:</b> PO Box 411 Carlton OR 97111

Contact Person	
<b>Print Name:</b> same as above	
<b>Phone:</b>	<b>Fax:</b>
<b>Title:</b>	<b>Email:</b>
<b>Street Address:</b>	<b>Mailing Address:</b>

Describe your organization's history; if the event has happened before, tell its history.

With Courage supports local families impacted by breast cancer by gifting a variety of care packages to them throughout their treatment plan.

Requested fund amount

\$5,000

Describe how the requested funds will be used:

Funds will be used to purchase items to fill each of the different packages. We aim to get the bulk of the items from local vendors/businesses.

How will you measure the success of your project?

By the number of packages we are able to give to local breast cancer patients.

What are your measurable goals?

The number of packages given in each category.

We anticipate that we will give:

Care Packages = 50 Surgery Package = 20 Radiation = 20 Road to Recovery = 50

Have you applied for a Community Grant previously? Yes  No

If yes, when did you last apply? 2023

List any other sponsors/contributors and assistance they provide your organization.

We currently do not have any sponsors/contributors for this specific ask.

What is the target audience? (check all that apply)

- Children (under 10 years)  
 Youth (10 - 14 years)  
 Teenagers (under 21 years)  
 Adults  
 Families  
 Seniors

Provide a general budget summary for your event.

Please see attached



PO Box 411 Carlton, OR 97111 503-218-3703

withcourage.org

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**Care Package (Total Cost per package = \$225)**

Purpose: This package is given to patients during active treatment after we have received referral and made contact.

**Items included:**

- Canvas Logo Tote Bag
- Insulated Water Bottle
- Cozy Blanket
- Cozy Socks
- Coloring Book
- Twistable Colored Pencils
- Journal
- Pen
- Blank Cards
- Stamps
- Lip Balm
- Hand Sanitizer
- Healing Balm
- Port/Post Surgical Pillow
- \$10 Coffee Gift Card
- \$50 Gas Gift Card
- \$50 Grocery Gift Card

**Surgery Package (Total cost per package = \$100)**

Purpose: This package is given to any patient who is going through surgery for breast cancer (Mastectomy or Lumpectomy)

**Items included:**

- Slippers
- Insulated Mug
- Peppermint Tea
- Neck Warmer
- Long Charging Cord
- Drain Clip Lanyard
- Sugar Scrub/Soap

**Radiation Package (Total cost per package = \$100)**

Purpose: This package is given to patients undergoing radiation treatment as part of their treatment plan for breast cancer.

**Items Include:**

- \$50 Gas Gift Card
- Soft wash cloth
- Healing balm
- Gentle Soap

**Road to Recovery Package (Total cost per package = \$100)**

Purpose: This gift is given to each patient as they come to the end of their treatment. For those in continued treatment they also receive this gift throughout their journey.

**Items included:**

- \$50 Gift Card for mini-Facial
- Bath Salts
- Facial Mask
- Soap
- Challenge Coin

**Anticipated Budget for all Packages for 2024:**

\$225 - Care Packages (50) - \$11,250

\$100 - Surgery Packages (20) - \$2,000

\$100 - Radiation Packages (20) - \$2,000

\$100 - Road to Recovery Packages (50) - \$5,000

**Total Cost = \$20,250**

A \$5,000 grant from your Community Grant Program would help to off set these costs and help us to support as many local breast cancer patients as possible!



# Exhibit 4

## APPLICATION FOR COMMUNITY GRANT

Applicant/Organization Name: Homeward Bound Pets Humane Society

Event Date(s) and location: 2024 HBPets Animal Shelter

Event/Activity Title: Shelter fund

### Organization Information

<b>Organization Type:</b>		<b>Federal Tax ID No:</b> 93-2687293
<input checked="" type="checkbox"/> Non-Profit 501C (3) <input type="checkbox"/> Other Non-Profit <input type="checkbox"/> For Profit Organization <input type="checkbox"/> Other	Describe organization type: HBPets is Oregon's first no-kill shelter and celebrating 49 years in 2024. We give animals the second chance they deserve.	

### Authorized Signer

<b>Print Name:</b> Ronnie Vostinak	
<b>Phone:</b> 503-472-0341 ext 9	<b>Fax:</b> N/A
<b>Title:</b> Executive Director	<b>Email:</b> executivedirector@hbpets.org
<b>Street Address:</b> 10601 SE Loop Rd McMinnville, OR 97128	<b>Mailing Address:</b> PO Box 8 McMinnville, OR 97128

### Contact Person

<b>Print Name:</b> Ronnie Vostinak	
<b>Phone:</b> 503-472-0341 ext 9	<b>Fax:</b> N/A
<b>Title:</b> Executive Director	<b>Email:</b> executivedirector@hbpets.org
<b>Street Address:</b> 10601 SE Loop Rd McMinnville, OR 97128	<b>Mailing Address:</b> PO Box 8 McMinnville, OR 97128

Describe your organization's history; if the event has happened before, tell its history.

In 2023, we provided 10,687 services to dogs and cats, including Spay/Neuter surgeries, shelter care, reuniting lost dogs, administering vaccines and microchips, along with issuing licenses to help lost pets return to their families. Financial contributions from our community help pay for things like surgeries, nutritious foods, medications, enrichment toys, vaccines, and microchips. HBPets shelter expenses for Yamhill County in 2023 was \$53,502. This only includes spay/neuter, vaccinations and microchips, not staffing.

Requested fund amount

Describe how the requested funds will be used:

The funds will be used for spay/neuter surgeries, vaccinations, microchips, food and supplies.

How will you measure the success of your project?

Success is being able to provide quality care to pets in need.

What are your measurable goals?

We track every animal that arrives each year. We know how long they stayed with us and what procedures were needed.

Have you applied for a Community Grant previously? Yes x No \_\_\_\_\_

If yes, when did you last apply? 2023

List any other sponsors/contributors and assistance they provide your organization.

HBPets sends a request for funds each year to the cities in Yamhill County plus the county. Each year, the cities from which we receive grants varies. We also send in grant requests to Petco.

What is the target audience? (check all that apply)

- Children (under 10 years)
- Youth (10 - 14 years)
- Teenagers (under 21 years)
- Adults
- Families
- Seniors

Provide a general budget summary for your event.

Our shelter is under financial distress as we have torn down our decade's old buildings due to the danger in operating in them except for the kennels. The shelter has been operating in rented construction trailers for two years! We are in a Capital Campaign to raise the roof on a new building and have brought in 71% of our goal to date. The shelter in 2024 is expecting to be \$69,000 in the red! We are grateful to every city who can help bridge this gap. Our team is working diligently through fundraising and our thrift shop to fill in for the shelter's current deficit.





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## Memorandum

**To:** The Mayor and Members of the City Council  
**From:** Shannon Beaucaire, City Manager  
**Subject:** Engineering RFQ Award  
**Council Goal:** Goal 4: Good Governance  
**Date:** April 2, 2024

## Recommendation

After review and discussion, it is recommended that the Council consider the following motion:

It is moved that the City Council accept Tetra Tech as the contractor to provide City Engineering Services and authorize the Mayor to execute all necessary documents.

## Background

As a federal funding requirement, the City is required to follow a procurement procedure different from State of Oregon requirements to be able to receive reimbursement of engineering fees for projects receiving federal funding.

To meet current and future federal funding requirements, the City issued a Request for Qualifications (RFQ) for City Engineer Services. The RFQ issued on February 15, 2024 and was advertised in the Daily Journal of Commerce (DJC) on February 16. It was also posted electronically and in the hard copy of the News Register on February 16 and February 20. The RFQ was due on February 29, 2024. The City received two (2) Statement of Qualifications (SOQ) proposals which were evaluated and scored as follows:

Requirement	Max Points		TetraTech	Westech
Qualifications of Key Staff	40		39	39
Statement of Understanding and Project Approach	40		39	38
Experience: Familiarity of the Consultant and proposed project team with the county, state and federal laws, regulations and standards which must be met by municipal systems as evidenced by past projects and staff experience.	20		20	20
Experience: Past experience of the Consultant and project team members with relevant county, state and federal regulatory and funding agencies.	20		20	18
Experience: Past experience and performance of the Consultant and project team members on similar agreements with cities or community districts. Provide at least two examples of providing the RFQ services for more than five years to the same entity.	40		40	40
Availability: The amount and type of resources and number of experienced staff persons available to perform these RFQ Services.	20		20	17
Availability: The recent, current and projected workloads of staff and resources available to perform these RFQ services.	20		17	17
Describe the Consultant's familiarity with Carlton.	15		15	14
Provide a minimum of three references for the project team. This should include the client, contact name and position, and phone number.	10		10	10
Miscellaneous factors relevant to this contract.	10		10	9
	235		230	222

The City will negotiate with the top qualifier for City Engineer Services. The professional services contract will be for approximately three years with an option to renew for two more years. The City retains the right to evaluate performance and fees, and to use alternative service providers if necessary.

### Alternatives

Do not approve and re-advertise

### Exhibits

1. RFQ for Engineering Services
2. Tetra Tech SOQ Submittal

**REQUEST FOR QUALIFICATIONS**  
**City of Carlton**

CITY ENGINEERING SERVICES

City of Carlton, Oregon

## GENERAL INFORMATION

### **Introduction**

The City of Carlton is issuing this Request for Qualifications (RFQ) to obtain responsive proposals from qualified engineering firms to provide city engineering service for the City of Carlton, Oregon. This includes supervising all assigned work produced by the City which is subject to the terms of ORS Chapter 672. The City is seeking an engineering firm which can perform all the duties of the City Engineer as described throughout this RFQ. The City Engineer is to be appointed by the Mayor and City Council and works under the direction of the City Manager.

As a result of this Request for Qualifications (RFQ) the City will select a top qualifier with whom to commence contract negotiations. If negotiations are successful, the City will enter into a professional services contract with that firm. The City will consider a City Engineer Services contract of approximately three (3) years with an option to renew the contract for an additional two (2) year term upon mutual consent of both parties. The initial contract period is anticipated to start July 1, 2024 and end June 30, 2027. The City reserves the right to conduct periodic review of these services. At the conclusion of each contract period, the City Engineer's performance will be evaluated. The City retains the option to renew the contract for additional two (2) year terms upon review of fees, performance and services. The engineer may submit updated rates for consideration at the end of each year. The City retains the option to use alternative service methods and service providers when the City deems it appropriate.

### **About the City of Carlton**

Carlton was incorporated in 1899. It is a small rural town, with a current population of 2,425. The City Council consists of a Mayor and 6 council members. The Mayor's term runs two years and the Councilors serve four-year staggered terms. The City Manager is the administrative head of the city government and is appointed by the City Council. Presently we have 14 full-time employees.

### **Scope**

1. General tasks associated with sewer, water, storm water, roads, parks and other typical municipal systems.
2. Assist with budgeting, and planning.
3. Suggest and comment on engineering related ordinance modifications, construction standards and specification modifications.
4. Assist with specifications and design of digital information (GIS/CAD) relating to existing infrastructure.
5. Work with City staff to review or complete permits, applications or agency notification.
6. Work with City staff, organizations and funding agencies to help develop competitive and complete funding proposals.
7. Serve as the City's project manager for public works development or planning projects prepared by other engineers. This includes land development projects such as subdivisions plus other significant design or study projects.
8. Thoroughly review preliminary design drawings and design calculations for compliance with state, county and city requirements and sound engineering practices.
9. Attend pre-application, pre-construction and City Council meetings as requested by the City or by project terms or specifications.

10. Thoroughly review final drawings and, after acceptance, stamp and sign the drawings in accordance with ORS 672.020.
11. Periodically review project construction sites to determine compliance with plans and specifications.
12. Review the completed project sites, the as-built drawings, testing results, and as-built certifications.
  13. Provide, as requested, project design, recommendations, and technical assistance for assigned projects, including but not limited to:
    - a. Property descriptions for right-of-way acquisition, including easements.
    - b. Preliminary and final plans, reports, exhibits, and other information on paper, compact disk, or hard copy reproducible media as requested by the City.
    - c. Construction drawings in both a 22" x 34" format and a reduced 11" x 17" format, on paper and reproducible media.
    - d. Survey maps and placement of monuments as required by the City.
    - e. As-built record drawings, on paper, compact disk, computer disk, or hard copy reproducible format as requested by the City.
    - f. Project files, including permits, correspondence, memoranda, telephone logs, inspection reports, and testing results.
    - g. Land use permit applications in accordance with City Municipal Code.
    - h. Completed permit applications from other agencies including ODOT, COE, DSL, DEQ and others.
14. Review, as requested, master plans and feasibility studies. Subconsultants may be used, subject to written approval by the City, on design projects or where supplemental expertise is necessary.
15. Additional services beyond the general scope, which cannot fully be described at this time, may be necessary if requested by the City.

### **Services to be provided by the City**

For projects contracted directly with the City, the City will provide the following services:

1. Provide a City Manager and Public Works Director who are responsible for overall project management and will provide coordination between the consultant and the City.
2. Establish the general work scope and design parameters for each project, including related standards.
3. Make available mapping and design information previously developed.
4. Make available survey control data, if available, to establish road centerline.
5. Make available guidelines, policies, and regulations to be used in review and/or developing design.
6. Submit applications and pay permit fees to the Agency, State and/or County for required permits. (Note consultant will prepare and may be requested to submit the application.)
7. Maintain records and process payment requests.
8. Provide the base or template provisions for the construction contract to which the consultant shall add terms and conditions unique to the project.
9. Legal review of all contracts, bid forms, and real property conveyances.



<b>PROPOSAL INSTRUCTIONS</b>
------------------------------

**SUBMISSION REQUIREMENTS AND FORMAT**

1. All proposals must be received by the City of Carlton, City Hall, Carlton, Oregon 97111. Consultants/contractors mailing proposals should allow for normal delivery time to ensure timely receipt. A signed original and one (1) pdf copy of the proposal must be submitted. The City of Carlton reserves the right to accept or reject any or all proposals. Proposals must be received no later than 2:00 p.m. on February 29, 2024. Proposals which are not delivered to City Hall by the above specified time and date will not be considered. Because this is a professional services procurement process, the proposals will not be read aloud.

All proposals will become part of the City's public record on this matter, without obligation to the City.

**REQUIREMENTS**

Proposals must include the items listed below.

1. The name of the person(s) authorized to represent the proposer in negotiating and signing any agreement which may result from the proposal.
2. Name and qualifications of the individual who will serve as the CITY ENGINEER. Provide a brief description of qualifications, skills, and responsibilities. This should include roles on similar accounts, depth of experience, and relevant experience in the last five years. Confirmation that the proposed EOR is a civil engineer licensed to work in the State of Oregon.
3. The names of the professional persons who will assist the CITY ENGINEER in performing the work and a current resume for each (maximum two page for each individual located in an appendix), including a brief description of qualifications, skills, and responsibilities. This should include position on the project, roles on similar accounts, extent of responsibilities, and relevant experience in the last five years.
4. A statement that the Proposal includes all terms and conditions of the RFQ.
5. Proof of insurance for a minimum of \$1 million professional liability insurance plus \$1 million comprehensive and automobile liability insurance. Proof of coverage by Workers' Compensation Insurance or exemption.
6. At least 3 references of current or former client cities of similar size for whom similar services have recently been provided. (Please include names, phone numbers, and possible example plans and charts).
7. A list of the tasks, responsibilities, and qualifications of any subconsultants proposed to be used on a routine basis.
8. Written affirmation that the firm has a policy of nondiscrimination in employment because of race, age, color, sex, sexual orientation, gender (including actual or perceived gender identity), religion, national origin, mental or physical disability, political affiliation, marital status or other protected class, and has a drug-free workplace policy.

9. Written confirmation that the proposer has and will make available to the project the necessary personnel.
10. Describe your firm's background and history including years in business, office location, general scope of services provided, and why your firm is qualified to perform the work.
11. Describe your firm's experience designing and constructing various municipal infrastructure facilities. Provide a list of municipal clients your firm has worked with during the past five-years including a description of work products delivered on similar engagements. Describe your familiarity working with federal, state and county laws, regulations and standards. Describe your experience with funding agencies.
12. Describe your firm's experience supporting the Land Use Planner in land use development permitting.
13. Address each of the evaluation criteria set forth below.
14. Proposals must be signed by a principal member of the proposing company capable of binding the company.
15. Provide any other information that supports the scope of services to be provided in this RFQ.

### **SELECTION PROCESS**

The City will assign an Evaluation Committee with the task of selecting the best qualified Consultant. The Committee will use a three-step process:

Step 1: The City's Evaluation Committee will review, score and rank all proposals received in accordance with the point's values that have been noted next to each proposal requirement. The proposals will be reviewed and, based on the strength of the proposals the City may, at its discretion result in a notice to proposers of selection and award directly from the evaluation of the proposals, based on the highest scoring responsive proposal submitted by a responsible proposer.

Or, based on the strength of the proposals the Evaluation Committee may short-list multiple qualified firms to participate in oral interviews.

Step 2: If the Evaluation Committee decides to interview proposers the candidates on the short list will be asked to give a brief oral presentation and be interviewed by the Committee.

Step 3: The candidates will be ranked based upon the evaluation criteria set forth below. This process should result in a recommendation to the City Council by April 2024.

### **Investigations**

The City Reserves the right to conduct appropriate investigations into the background, previous experience, and training, financial affairs and related matters of any firm or individual under consideration for a contract resulting in successfully completing the RFQ process. Said investigation may include, but are not limited to, credit reports, submission of audited financial statements, communication with principal clients, as appropriate, relating to the ability of your firm to successfully perform the duties and responsibility of City Engineer.

### **EVALUATION CRITERIA**

Proposals will be evaluated based on the submission requirements listed above to determine which firm best meets the needs of the City. After meeting mandatory requirements listed above, proposals will be evaluated on the following factors:

1. **Qualifications of Key Staff** – Identify the key staff members who will be assigned to the City project for this contract. Describe their roles and provide a brief description of their professional experience. *Higher scores will be given to proposals with the best key staff.* **(40 Points)**
2. **Statement of Understanding and Project Approach** – Demonstrate that the consultant has an understanding of what is required with regard to the scope. *Higher scores will be given to teams demonstrating an understanding of the City's needs.* **(40 Points)**
3. **Experience** – Describe the Consultant's experience on projects of similar scope.
  - Familiarity of the Consultant and proposed project team with the county, state and federal laws, regulations and standards which must be met by municipal systems as evidenced by past projects and staff experience. **(20 Points)**
  - Past experience of the Consultant and project team members with relevant county, state and federal regulatory and funding agencies. **(20 Points)**
  - Past experience and performance of the Consultant and project team members on similar agreements with cities or community districts. Provide at least two examples of providing the RFQ services for more than five years to the same entity. **(40 Points)**

*Higher scores will be given to Consultants that demonstrate the greatest experience with local, state and federal regulators and other municipal clients.*
4. **Availability**
  - The amount and type of resources and number of experienced staff persons available to perform these RFQ Services. **(20 Points)**
  - The recent, current and projected workloads of staff and resources available to perform these RFQ services. **(20 Points)**

*Higher scores will be given to Consultants that can demonstrate availability for this contract.*
5. **Familiarity with Carlton** - Describe the Consultant's familiarity with Carlton. *Higher scores will be given to Consultants that demonstrate familiarity with Carlton.* **(15 Points)**
6. **References** – Provide a minimum of three references for the project team. This should include the client, contact name and position, and phone number. *Higher scores will be given to teams with the best references.* **(10 Points)**
7. **Miscellaneous factors relevant to this contract.** **(10 Points)**

At the discretion of the selection committee, finalists may be invited to an oral interview.

### **ECONOMY OF PRESENTATION**

Statements should be prepared simply and economically, providing a straightforward, concise presentation of the information requested. Fancy bindings, colored displays, promotional materials, etc. are not important. Emphasis should be on completeness and clarity of content.

### **CONTACT PERSON**

Respondents can contact Shannon Beaucaire for further information regarding this process. Contact with other City officials may be grounds for disqualification. The City Manager can be reached by email at [sbeaucaire@ci.carlton.or.us](mailto:sbeaucaire@ci.carlton.or.us) or by phone at (503) 852-7575. If proposers have any questions regarding this RFQ or the selection process, the questions shall be submitted in writing to the City Manager. All responses will be issued by email and posted on the City's website at [www.ci.carlton.or.us](http://www.ci.carlton.or.us).

**QUESTIONS**

Questions may be sent via email. The firm posing the question will not be identified in the notification/response.

**SCHEDULE FOR SELECTION PROCESS**

RFQ Advertised	February 15, 2024
Proposal Close	February 29, 2024
Proposal Evaluation	The week of March 4, 2024
Interviews (If Necessary)	The week of March 11, 2024
Recommendation to City Council	April 2, 2024
Contract Awarded	Following Action by the City Council

**LATE PROPOSALS NOT CONSIDERED**

Proposals must be received by the time specified at the address listed above. Any proposals received after the deadline will not be considered.

**ADDENDA**

In the event that it is necessary to amend, revise, or supplement any part of the RFQ, addenda will be provided to all proposers who have notified the City Manager at 945 W. Grant St, Carlton, OR 97111. Addenda will also be posted on the City website at [www.ci.carlton.or.us](http://www.ci.carlton.or.us). Any addenda so issued are to be considered part of the specifications of the RFQ. City is not responsible for any explanation, clarification, interpretation or approval made or given in any manner except by written addenda issued by City.

**PROPOSAL OWNERSHIP**

All material submitted by the proposers shall be considered property of City, and City shall not be required to return same to any proposer. The material submitted by proposers will be treated in the same manner as City's own records. After proposal opening, all proposals become part of the public record unless exempt under Oregon Public Records Law.

**EXCEPTIONS TO RFQ**

If, for any reason, a proposer should find fault with the structure of this RFQ or with the evaluation process, concerns may be submitted in writing to: Shannon Beaucaire, City Manager, 945 W. Grant St, Carlton, OR 97111. The City will make every effort to answer questions and, if warranted, to amend the RFQ. Proposers who are unable or unwilling to meet any of the requirements of this RFQ should include, as part of their response, written exceptions to those requirements.

**COMMENTS AND PROTEST PROCEDURES**

A prospective proposer may deliver to the City of Carlton City Manager, Attention Shannon Beaucaire, a written request for change to any of the specification listed in this Request for Qualifications. Such request shall be delivered at least five working days prior to the RFQ closing date. A written request for change shall include:

- A. A detailed description of the legal and factual grounds for the request,
- B. A description of the resulting prejudice to the prospective proposer,
- C. A statement of the form of relief requested or any proposal changes to the specifications.

The City will review the specification change request and notify the prospective proposer of the decision in writing prior to the RFQ closing date. Proposers are directed to the protest procedures set forth in Division 48 of the Attorney General's Model Rules for Public Contracting with regard to any protest that may be filed.

**INCURRING COSTS**

The City of Carlton is not liable for any cost incurred by respondents prior to issuance of a contract.

**RIGHT TO REJECT ALL PROPOSALS**

The City reserves the right to reject any and all proposals, to waive any irregularities, and to accept the proposal deemed in the best interests of City. The City may reject any proposal not in compliance with all prescribed public proposal procedures and requirements, and may reject for good cause any or all bids upon a finding of the City it is in the public interest to do so.

**PROFESSIONAL SERVICES CONTRACT**

The selected consultant will be required to sign a professional services contract acceptable to the City including all applicable required clauses for public contracts relating to consulting services.

**The City of Carlton is an Equal Opportunity Employer**

THIS ANNOUNCEMENT IS NOT AN IMPLIED CONTRACT AND MAY BE MODIFIED OR REVOKED WITHOUT NOTICE.

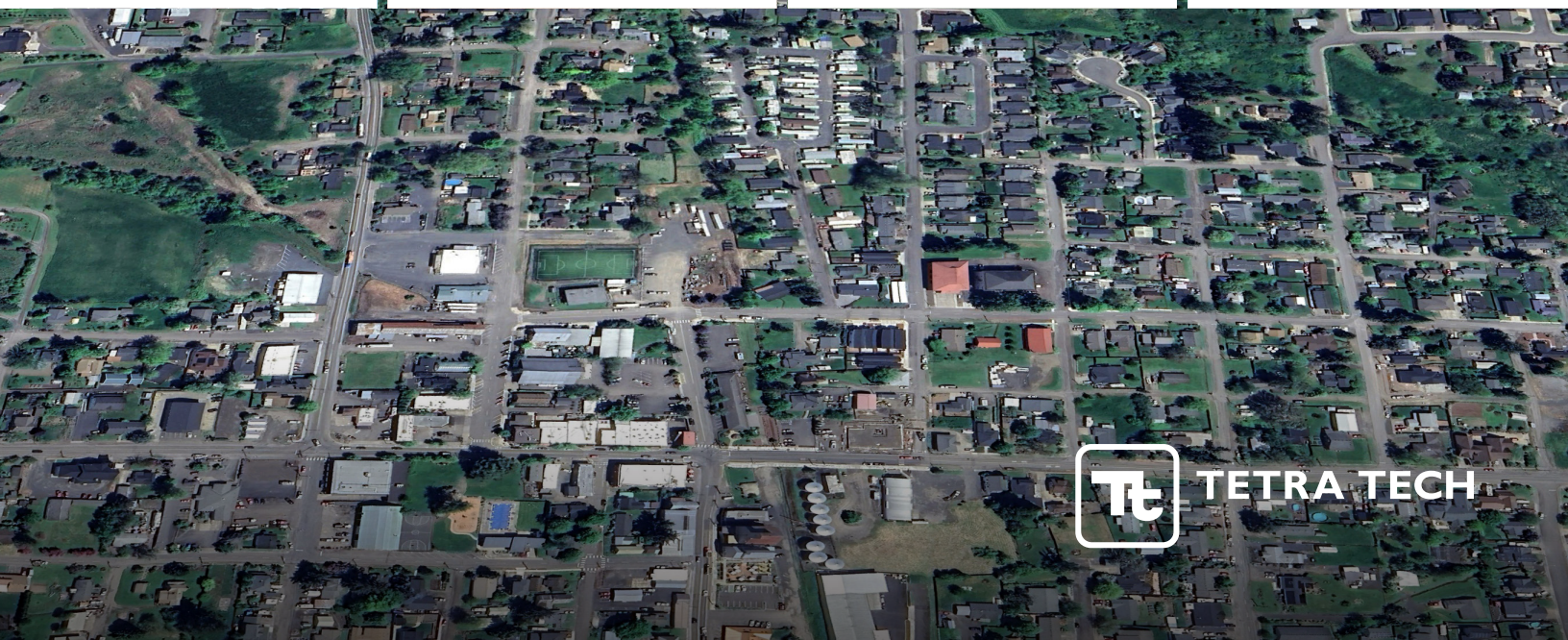




STATEMENT OF QUALIFICATIONS

# CITY ENGINEERING SERVICES

2024



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February 29, 2024

Shannon Beaucaire  
City Manager  
City of Carlton  
945 W. Grant St.  
Carlton, OR 97111

## Re: Statement of Qualification for City Engineering Services

Dear Mrs. Beaucaire and Members of the Selection Committee,

City Engineering is the core of our business practice out of the Portland office. Currently we serve five similar sized communities nearby Carlton as city engineer. Every person in our office is engaged in city engineering services and our office is growing allowing us to be even more responsive. We bring the following attributes that will be an asset to Carlton:

**Core Services.** City Engineering services is one of the core elements of the services that our Portland office provides and we have been doing so for more than 30 years.

**Proposed Engineer-of-Record (EOR).** The proposed engineer of record, Gordon Munro, has been providing city engineering services his entire career for multiple communities in Oregon and has been the EOR for Carlton for the last eight years.

**Knowledge of Carlton.** Gordon and the Tetra Tech staff have extensive knowledge of the Carlton public facilities as well as the community having worked on over 50 projects in Carlton in the last 8 years.

**All Elements of Projects.** Tetra Tech provides all the standard services such as planning, permitting, design, funding, cost estimating, construction management and land use support expected for water, wastewater, stormwater and transportation projects.

**Extra Depth.** Tetra Tech has depth beyond the usual expertise which has been pertinent on several Carlton projects. We provided a limnologist and dredging expert for the raw water dredging project, commissioning agents for the civic building, river hydrologic and no-rise modeling for the new outfall, dam and flood experts for the dam raise evaluation and environmental permitting.

Tetra Tech looks forward to the prospect of continuing to serve the City of Carlton for on-call city engineering and we appreciate your consideration. Please contact Gordon Munro, PE, at 971.330.5168 or [Gordon.Munro@tetrattech.com](mailto:Gordon.Munro@tetrattech.com) if you have questions concerning the material in this proposal.

Sincerely,

Tetra Tech, Inc.

A handwritten signature in blue ink, appearing to read 'Gordon A. Munro'.

Gordon Munro, PE  
City Engineer

# FIRM BACKGROUND

<b>Legal Name, Address, &amp; Telephone of Local Portland Office</b>	<b>Person Authorized to Represent Tetra Tech in Negotiations</b>
Tetra Tech, Inc. 15350 SW Sequoia Parkway, Suite 220 Portland, OR 97224 P: 503.684.9097	Gordon Munro, PE P: 503.598.2530 C: 971.330.5168 Gordon.Munro@tetratech.com



Our work consists of an estimated 80/20 percent client mix between public agencies and private business. Project types and size vary greatly and is an indicator of our versatility. Smaller projects often involve indefinite quantity, and ongoing/on-call contracts. In the public sector, this includes wastewater, water, stormwater, streets, parks, environmental permitting, as well as city engineering and development review. Projects often include pipelines, pump stations, technical studies, master plans, wastewater and water treatment, reservoirs, large diameter pipelines and tunnels, regional transit maintenance facilities, defense facilities, interpretive/visitor centers, aquariums, and fisheries facilities. As part of most projects, Tetra Tech provides assistance on nearly all aspects of projects including land use planning, facility planning, design, construction management, public meetings/public involvement and permitting, coordination with regulatory agencies, and funding assistance.

## MINIMUM QUALIFICATIONS

<b>Years in Business</b>	Tetra Tech, Inc., a publicly held company, is headquartered in Pasadena, California and was founded in 1966. In 1995, KCM and its subsidiaries became part of the Tetra Tech, Inc. family of companies. Tetra Tech/KCM (now Tetra Tech, Inc.) was established in Seattle in 1943. The Oregon branch was started in 1976.
<b>Why We're Qualified</b>	<ul style="list-style-type: none"> <li>» <b>CORE SERVICES:</b> City Engineering Services is one of the core elements of the services that our Portland office provides, and we have been doing so for more than 30 years.</li> <li>» <b>PROPOSED EOR:</b> The proposed city engineer, Gordon Munro, has been providing city engineering services his entire career for multiple communities in Oregon, and he has been performing as city engineer in Carlton for the last eight years.</li> <li>» <b>CARLTON KNOWLEDGE:</b> Gordon and the Tetra Tech staff have extensive knowledge of the Carlton public facilities as well as the community having worked on over 50 projects in Carlton including public facilities and land use projects.</li> <li>» <b>ALL ELEMENTS OF PROJECTS:</b> Tetra Tech provides all the standard services such as planning, permitting, design, funding, cost estimating, construction management and land use support expected for water, wastewater, storm water and transportation facilities.</li> <li>» <b>EXTRA DEPTH:</b> Tetra Tech also has the depth to provide unusual expertise, which has been pertinent on several Carlton projects. We provided a limnologist and dredging expert for the raw water reservoir project, commissioning agents for the civic building, river hydrology modeling for the new outfall, no-rise modeling for the outfall, dam and flood experts for the dam raise evaluation and environmental permitting.</li> </ul>

**MINIMUM QUALIFICATIONS, CONTINUED**

<b>Contract Negotiations</b>	Gordon Munro is authorized to sign a contract if Tetra Tech is selected to perform work for the City of Carlton. Gordon may be contacted at 503 598-2530 (971 330-5168c) or gordon.munro@tetratech.com.
<b>City Engineer of Record</b>	Gordon Munro, P.E., would serve as the Project Manager/City Engineer for Carlton. Gordon has served as City Engineer in multiple communities including Carlton, Lafayette, Gervais, Scappoose, Hermiston, Banks, Rainier and others. Gordon is registered as a Professional Engineer in the State of Oregon, PE #14047
<b>Capacity: Professional Engineers and Registrations</b>	<p>Key members of our team that will primarily assist Gordon include:</p> <ul style="list-style-type: none"> <li>■ Matt Huxley, P.E. — Civil Engineer, Oregon PE#60424PE</li> <li>■ Erik Nordholm, P.E. — Civil Engineer, Oregon PE #57186</li> <li>■ Hunter-Bennett-Daggett, P.E. – Civil Engineer, Oregon PE #88278</li> <li>■ Jesse Fields, PE – Civil Engineer, Oregon PE #91548</li> </ul> <p>In the Pacific Northwest, Tetra Tech has more than 360 employees who are available to work in Carlton as needed. Tetra Tech has 28,000 employees firm-wide with 550 office locations.</p>
<b>Staff Availability</b>	The key staff members listed above are all available to begin work immediately for the City of Carlton. There are six additional designers and engineers in the Portland office who have already worked in Carlton and are available to assist as needed.
<b>Insurance</b>	Tetra Tech maintains Professional Liability, Contractors’ Pollution Liability Insurance, Commercial General Liability Insurance, Automobile Liability, Excess Liability and Workers Compensation, meeting the minimum requirement amount of \$1 million. Please see Appendix B for our Certificate of Liability Insurance, proof of coverage.
<b>Subconsultants</b>	<p>Aspect Consulting – Geotechnical Engineering</p> <p>DKS Associates – Traffic Engineering</p> <p>PACE Engineers, Inc. – Surveying</p>
<b>Oregon Business License</b>	Tetra Tech’s Federal Tax ID is #95-4148514. Our Oregon Registration is 110373-89. Our individual engineer’s registration numbers are provided above.
<b>Terms and Conditions</b>	This statement of qualifications includes all terms and conditions of the RFQ.
<b>Policy of Non-Discrimination &amp; Drug-Free Workplace Policy</b>	<p>It is and will continue to be the policy of Tetra Tech, Inc., and all its branch offices and subsidiaries, in all aspects of employment, to treat all persons on the basis of qualifications, competence, and merit without regard to race, color, ancestry, national origin, sex, sexual orientation, gender identity, age, marital status, genetics, religion, and disability (including medical and developmental disability). Affirmative action will be taken to include and consider all candidates who are members of minority groups, females, protected veterans, disabled veterans and the disabled.</p> <p>Tetra Tech, Inc., and it’s subsidiaries is committed to providing employees with a safe and healthy work environment, free from the effects of drug and alcohol abuse. To demonstrate the commitment to that goal, Tetra Tech has implemented a substance abuse policy.</p>

# ORGANIZATIONAL CHART

The key project team members and their roles are shown on the following organization chart.



**City of Carlton  
City Manager**  
Shannon Beaucaire

**CITY ENGINEER**  
Gordon Munro, PE

**QA/QC**  
Matt Huxley, PE  
Geoff Baldwin, PE

## KEY TEAM MEMBERS

**PRIMARY LOCAL SUPPORT**

Erik Nordholm, PE  
 Jesse Fields, PE  
 Hunter Bennett-Daggett, PE  
 Lesley Martinez, EIT  
 Katelin Vandehey, EIT  
 Ava Zoebelein, EIT

**DISCIPLINE SUPPORT**

<i>Structural</i> Ryan Maas, PE	<i>Mechanical</i> Mitch Graf, PE
<i>Electrical</i> John Rice, PE	<i>Architectural</i> Marcel Bodsky, RA

**SUBCONSULTANTS**

<i>Survey</i> PACE Engineers, Inc.	<i>Geotechnical</i> ASPECT Consulting	<i>Traffic</i> DKS Associates (DKS)
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# QUALIFICATIONS OF KEY STAFF

*Gordon has been City Engineer for multiple cities and has served on city staff through the development review process. He has served as contract City Engineer for Carlton (8 years), Gervais (6 years), Scappoose (20 years), Hermiston (7 years), Banks (7 years), Rainier (10 years), Scotts Mills (10 years) and Lafayette (13 years). He has also worked with city staff assisting in development review in West Linn, Oregon City and Canby. Projects that Gordon has managed and designed through city engineering services include waterlines, sanitary sewer lines, storm drainage, street improvements, reservoirs, parks, pump stations, wastewater and water treatment plant improvements, development review, as well as developing design standards for at least seven communities, and updating ordinances. His experience extends through the full breadth of projects from planning through funding, public outreach, design, permitting, construction management and follow-up services.*

**Recent Projects within Five Years: Carlton Dredging, Carlton Transmission Line, Lafayette Reservoir, LWD Waterline, City Engineer - Carlton, City Engineer - Lafayette, City Engineer - Gervais**



**GORDON MUNRO, PE**

**39** YRS. EXP.

Role: City Engineer/Project Manager  
Office: Portland, OR  
LICENSED IN OREGON, NO.: 14047



**MATT HUXLEY, PE**

**27**

Role: Sr. Engineer/Support Staff  
Office: Portland, OR  
LICENSED IN OREGON, NO. 60424PE

YRS. EXP.

Matt has 27 years experience and is the acting city engineer in Donald, Oregon. He also provided development review for the City of Wilsonville. His experience in public works projects includes planning, design and construction management for water, stormwater, wastewater and transportation projects. Some of his recent experience includes the Hawn Creek wastewater pump station in Carlton, water transmission line upgrade in Astoria, storm system improvements in Hood River as well as water treatment plant design for the DoD.

**Recent Projects within Five Years: City Engineering Donald, Hood River Storm Improvements, Carlton Hawn Creek Pump Station, Wilsonville Development Review, Osan Water Treatment Plant**



**HUNTER BENNETT-DAGGETT, PE**

**19**

Role: Engineering Support Staff  
Office: Portland, OR  
LICENSED IN OREGON, NO. 91548

YRS. EXP.

Hunter has 19 years of experience in development review, design, permitting, and construction on wastewater and water projects. While with Tetra Tech, Hunter has assisted senior engineers with the design and permitting of proposed wastewater treatment facilities, sewer pipelines, waterlines, water supply projects, and fish hatcheries. He has also been providing development review services for the City of Oregon City and Wilsonville, including pre-application meetings and design review, and assisting in City Engineering Services for Lafayette, Carlton and Donald.

**Recent Projects within Five Years: Carlton Grant St. Sanitary Sewer, LWD Waterline, Sherwood Water & Sanitary Pipe, Wilsonville Development Review**



**ERIK NORDHOLM, PE**

**26**

Role: Engineering Support Staff  
Office: Portland, OR  
LICENSED IN OREGON, NO. 57186

YRS. EXP.

Erik has 26 years of experience in modeling, planning, design, and construction management on sewer, water, stormwater and street projects. He has assisted in many projects through city engineering services as well as providing design review on developments. Some recent projects include the wastewater treatment plant in Carlton, pipelines and pump stations for Clean Water Services, wastewater treatment plant for Clatskanie, and a well for Milwaukie.

**Recent Projects within Five Years: Carlton WWTP, Carlton Hawn Creek Pump Station, CWS Norwood Pump Station, Milwaukie Well, Clatskanie WWTP**



**JESSE FIELDS, PE**

**9**

Role: Engineering Support Staff  
Office: Portland, OR  
LICENSED IN OREGON, NO. 91548

YRS. EXP.

Jesse has nine years of experience in public works projects including planning, design and construction management for water and wastewater projects. Currently he is the City Engineer for Gaston, is providing construction management for the Carlton headworks and Lafayette reservoir, developing a water master plan for Gaston, wastewater facility plan for Lafayette, and development review in Gaston.

**Recent Projects within Five Years: Gaston City Engineer, Carlton Headworks, Lafayette Reservoir, Gaston Water Master Plan, Astoria Transmission Main**

## ADDITIONAL STAFF

Tetra Tech has great depth and expertise that can be accessed if needed. This includes the following in-house disciplines:

- Structural Engineers
- Electrical and Control Engineers
- Mechanical Engineers
- Architects
- Landscape Designers
- Environmental Scientists
- Fisheries/Fish Bypass/Hatchery Engineers
- Many other specialties are also available such as wastewater treatment, water treatment, corrosion control, odor control, hydraulics, hydrology, modeling, limnologists, bathymetric surveying, mobile mapping and more.

## SUBCONSULTANTS



**PACE ENGINEERS, INC.**  
Office: Lake Oswego, OR

### *PACE Engineers, Inc.*

PACE Engineers is a well-established, multi-disciplined firm with over 37 years of experience providing civil engineering, land surveying, and land use planning throughout Oregon and Southern Washington. We partner with our clients as an extension of their teams, providing additional expertise and innovative solutions to site-specific project challenges.

For this project, PACE will provide survey services. They have already provided survey work on multiple Carlton projects.



**ASPECT CONSULTING**  
Office: Portland, OR

### *Aspect Consulting*

Aspect is a full-service geotechnical and environmental consulting firm founded in 1984. Aspect’s experience with public infrastructure includes alternatives analysis for route selection, detailed geotechnical investigations for final design and construction, and observations services during construction.

For this project, Aspect will provide geotechnical services as they have on several Carlton projects. These projects included the Transmission Line, Grant Street Sewer, and the Civic Center.



**DKS ASSOCIATES**  
Office: Portland, OR

### *DKS Associates (DKS)*

DKS was founded in 1979 and provides transportation and traffic engineering for specific planning areas, corridor studies and city-wide planning. They have prepared transportation system plans (TSP) for many communities and have established good working relationships with ODOT and many counties and cities. They have also been involved in the development review process, reviewing and interpreting traffic reports. DKS maintains an office in Portland, Oregon.

On this project, DKS will provide traffic engineering, including assistance as required on development review, as they have done in the past.



# EXPERIENCE AND QUALIFICATIONS

## City Engineering and Development Review Qualifications

**Representing the City:** The experience that Tetra Tech has as a firm, and the experience of the specific staff that we are dedicating to Carlton, allows Tetra Tech to effectively and efficiently represent the community. There are several elements to this:

- ***Familiarity with the community***, not just the infrastructure. Over the last eight years, Tetra Tech has become familiar with the unique nature of Carlton, which allows us to focus solutions and improvements that address the community as well as the technical aspects. This has assisted in prioritization of pavement improvements, providing a stepped approach to winery pretreatment to help keep the wineries strong
- ***Knowledge of the City's infrastructure***, standards and codes. Tetra Tech has worked on nearly every element of the City infrastructure from planning through design and construction, so there is no learning curve. We are also assisting and in some cases writing the updates to the development code and design standards as we know where the issues are.
- ***A small communities focus provides*** Tetra Tech the understanding of the challenges that they face. Financial limitation and minimal staffing are major challenges, and yet the requirement to provide all the service and meet all the regulations. This requires fresh ideas and innovative approaches that are still technically sound. It also requires balancing between what can be done and the ultimate solution.
- ***We have worked as city engineer in many communities***, which brings knowledge and connections. Having worked as a city engineer in multiple communities for his entire career gives our proposed city engineer, Gordon Munro, a feel for what is needed and what can be done that is difficult to define or replicate. He has also developed a network of communities that he can tap into providing even greater depth of knowledge.
- ***Tetra Tech has a deep bench*** while remaining flexible to meet the requirements of Carlton. Our local office has 14 staff all of which are available to work on Carlton projects, and we have a deep bench of experienced staff country wide that focus on public infrastructure. They are also available, and in fact we have used staff from across the country on Carlton projects in the past. This has included a dredging expert from Florida, a limnologist from Seattle and others.

**Project Elements:** For the City Engineering projects, we have provided a partial listing of the work done under that contract. The design projects listed typically include predesign, design, permitting, agency coordination, bid services, contracting, and construction management services.

**Regulatory Agencies:** A list of specific projects completed for each community is provided, which includes planning and design for facilities where federal, state, county and local laws and regulations must be understood and followed. This includes coordination with DEQ, OHD, Water Resources Department, ODOT, Division of State Lands, Corps of Engineers, various railroads, and counties through permitting and design review processes.

**Funding Agencies:** Tetra Tech has also assisted many communities obtaining funding for projects. We have worked with ARPA, CWSRF, USDA, EDA, IFA, ARRA Block Grant, SCA, safe routes to schools, and direct funding from the State and GO Bonds. We have also attended one-stop meetings in Salem.

**Land Use Planning:** Tetra Tech staff have provided land use planning support services for many communities such as: Carlton, Gervais, Donald, Gaston, Rainier, Scappoose, Hermiston, West Linn, Oregon City, Wilsonville, Canby and Cannon Beach. In several communities, our staff members actually were located at the City and included in City staff meetings as we were so involved with the process. We work closely with the land use planners, outside agencies and city support staff assisting with pre-application conferences, completeness reviews, application reviews, development of staff reports, development of conditions-of-approval, attending Planning Commission meetings, design reviews and construction inspection. We have supported several communities update development ordinances and design standards. Tetra Tech also has land use planners who we often utilize as subject matter experts.

**Projects:** Experience has been shown both for Tetra Tech, and specifically for the proposed project manager, Gordon Munro. While the experience and depth of the firm is important, it is often the experience of the individual team members that is key.



## PROJECT EXPERIENCE

### Carlton, Oregon

- » Concrete Reservoir improvements
- » Recoating clearwell
- » MW&L Intertie
- » Transmission Line replacement
- » Dam raising study
- » Raw water reservoir dredging
- » Wastewater facility plan
- » Mercury TMDL Implementation Plan
- » WMCP report & Update
- » Hawn Creek PS
- » WWTP Upgrade
- » Market St sanitary sewer
- » E. Main St paving
- » Monroe St paving
- » Park St paving
- » Traffic control evaluation (3)
- » Grant St sewer and water pipe
- » Third & Washington storm repairs
- » Development review
- » And more

**City Engineering Services, City of Carlton, OR** – Tetra Tech served as City Engineer from 2016 through 2024. Services included providing technical data, recommendations, and cost estimates to the City in the areas of transportation, water, wastewater, and storm water; and providing development review, public improvement planning, design, permitting and construction management. Routinely kept the City apprised of new regulations and funding opportunities as well as assisting in funding application. Attend City Council and Planning Commission meetings as required.

### Lafayette, Oregon

- » Water Source Evaluation
- » Mercury TMDL Implementation Plant
- » Market Street Storm Pipe
- » ERP Development
- » Bridge Street Sidewalks
- » Biosolids Management Plan
- » Reservoir Evaluation
- » Air Stripping Pilot Test
- » Reservoir recoating
- » New 1 MG reservoir
- » Wastewater Facility Plan
- » Monroe Street Sidewalks
- » Monroe & Market Street Overlay
- » City Hall Parking Lot
- » Third Street Waterline
- » Bluebird Waterline
- » 4th Street Sanitary Sewer
- » MW&L Intertie & Booster PS
- » Main Line Meters

**City Engineering Services, City of Lafayette, OR** – From 2010 through 2024, while with two different firms (including Tetra Tech), Gordon is providing city engineering services primarily for the water, wastewater and transportation systems. This includes evaluations, design, construction management, cost estimating and permit assistance.

### Gervais, Oregon

- » WWTP Expansion (twice)
- » WTP Expansion
- » Water Reservoir
- » Ivy Street Sidewalks and Storm
- » 3rd Street Improvements
- » 1st Street Improvements
- » Master Plans, Water, Wastewater, Stormwater
- » SDC Update
- » Douglas pedestrian improvements
- » SCA projects (multiple)
- » Design Standards
- » Development review

**City Engineering Services, City of Gervais, OR** – Tetra Tech has been serving as contract City Engineer from 1993 through 2024. Services include providing technical data, recommendations, and cost estimates to the City in the areas of transportation, water improvements, sanitary sewer improvements and storm sewer improvements; and providing review of all subdivision design, public improvement designs, and engineering studies. Gordon helped to develop design standards and specifications, and routinely keeps the City apprised of new regulations and funding opportunities.

## PROJECT EXPERIENCE

<p style="text-align: center; margin: 0;"><b>Donald, Oregon</b></p> <ul style="list-style-type: none"> <li>» Mercury TMDL</li> <li>» Stormwater Master Plan</li> <li>» Development Review</li> <li>» New Well</li> <li>» WTP Upgrades</li> <li>» Blake Court Waterline</li> <li>» Funding Assistance</li> <li>» Water Master Plan Amendment</li> <li>» Biosolids Assessment</li> <li>» Recycled Water Plan Assessment</li> <li>» Wastewater Facility Plan Amendment</li> <li>» Multiple SCA Street Projects</li> <li>» Matthieu St. Improvements Ph. 1 &amp; 2</li> </ul>	<p><b>City Engineering Services, City of Donald, OR</b> – Tetra Tech served as City Engineer starting in 2020. Services included providing technical data, recommendations, and cost estimates to the City in the areas of transportation, water, wastewater, and storm water; and providing development review, public improvement planning, design, permitting and construction management. Routinely kept the City apprised of new regulations and funding opportunities as well as assisting in funding application. Attend City Council and Planning Commission meetings as required.</p>
<p style="text-align: center; margin: 0;"><b>Gaston, Oregon</b></p> <ul style="list-style-type: none"> <li>» Third St. Improvements</li> <li>» First St. Improvements</li> <li>» Mercury TMDL Implementation Plan</li> <li>» Water Master Plan</li> <li>» Funding Assistance</li> <li>» ODOT ADA Ramp Coordination</li> <li>» Trails End Water Booster Pump Station Upgrade</li> <li>» Development Review</li> <li>» DEQ Needs Assessment</li> <li>» City Hall Assistance</li> </ul>	<p><b>City Engineering Services, City of Gaston, OR</b> – Tetra Tech served as City Engineer starting in 2020. Services included providing technical data, recommendations, and cost estimates to the City in the areas of transportation, water, wastewater, and storm water; and providing development review, public improvement planning, design, permitting and construction management. Routinely kept the City apprised of new regulations and funding opportunities as well as assisting in funding application. Attend City Council and Planning Commission meetings as required.</p>
<p style="text-align: center; margin: 0;"><b>Wilsonville, Oregon</b></p> <ul style="list-style-type: none"> <li>» Development Review Services</li> </ul>	<p><b>Development Review Services, City of Wilsonville, OR</b> – Tetra Tech provided development review services for the City while they were short of staff. Services included attending pre-application meetings, reviewing applications, developing conditions of approval, and design review with regard to water and wastewater. Tetra Tech staff also attended weekly City staff coordination meetings. Tetra Tech staff working on the project included Gordon, Matt, Hunter and Erik.</p>

Tetra Tech and staff have also provided city engineering or on-call services for the following communities, which are not listed above or on previous pages.

City Engineering Services	On-Call Engineering	IDIQ/Engineering Roster
City of Scappoose	City of Beaverton	City of Eugene
City of Rainier	City of Estacada	City of Lake Oswego
City of Vernonia	City of Forest Grove	City of Tigard
City of Molalla	City of Hermiston	City of Tualatin
City of Cannon Beach	City of Lowell	National Parks Service
City of Gates	City of Salem	Oregon Parks and Recreation
City of Scotts Mills	Clean Water Services	US Fish & Wildlife
City of Sodaville	City of Fairview	Portland BES
City of West Linn	City of Oregon City	City of Wilsonville
City of Hermiston	City of Milwaukie	
City of Banks		
City of Silverton		

## PROJECT DESCRIPTIONS

Tetra Tech has completed hundreds of public works projects for multiple cities in Oregon; a comprehensive list would be quite large. Therefore, we have provided a few project descriptions for specific projects that show an array of the type of public works infrastructure projects that Tetra Tech provides.

### Water System Intertie with MW&L

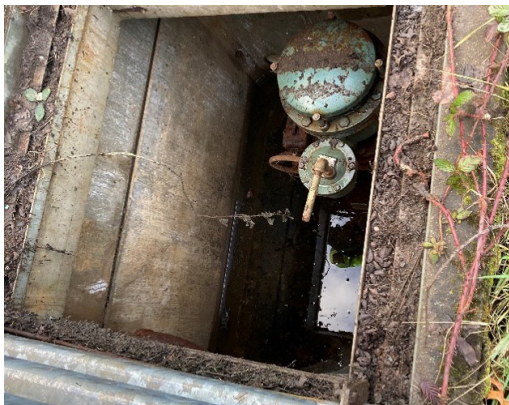
#### CITY OF LAFAYETTE, OR

Tetra Tech conducted the initial planning study to determine routing, water compatibility, system hydraulics and siting for the pump station. This included coordination with MW&L with regard to the connection point and internal MW&L hydraulics. The design included a 500 gpm booster pump station with a jockey pump in a CMU block building, master meter, backflow preventer, pH adjustment, chlorine booster, back-up generator, new power feed, site work, controls and SCADA. The control of the pumps is tied back to the reservoir level in the water shed, and the Dayton booster pump station.



### Ice Age Drive

#### CITY OF SHERWOOD, OR



Ice Age Drive is a new road through an undeveloped industrial zone, and is being constructed to help spur development. Tetra Tech is providing the water and sanitary sewer design for the project. This includes approximately 3,000 feet of 16-inch waterline with air relief valves, fire hydrants and service lines; and approximately 3,000 feet of sanitary sewer line with service lines. Both pipelines are cased as they go underneath the main gas line. The casings are being installed as early work so are designed to have additional room in them for flexibility.

### Market Street Parking Lot and Sidewalk Improvements

#### CITY OF LAFAYETTE, OR

As part of the new fire station land use permit, the City was required to construct additional parking. The parking lot improvements were combined with a street maintenance project. The parking lot is at the corner of 4th and Market Streets and includes 14 parking spots, storm drainage, landscaping, lighting, sidewalks, curb and gutter and widening the street. The remainder of the projects included two blocks of sidewalk from the parking lot to the City Park. This sidewalk also serves the County Museum. The sidewalk improvements included minor storm improvements, shoulder improvements, alignment modification to avoid large mature trees, and parking bumpers in front of the Museum.





# Master Planning Updates

## CITY OF DONALD, OR

Initial work for the City included updating the water master plan, wastewater master plan and storm water master plan. Significant development was proposed for the community in the form of housing for workers through a government program. This would greatly increase the population thus greatly increasing the water demand and wastewater flow. Key elements for the water system included two new wells and WTP upgrades which are now in design. Key elements for the wastewater were expanded of the lagoon treatment system and expanded or new discharge methods. The stormwater system required a survey of the entire community as it is so flat it is challenging develop a stormwater system. These all included the standard elements of master planning, including system description, mapping, deficiencies, and CIP development.



# Safe Routes to School and Street Improvements

## CITY OF GERVAIS, OR

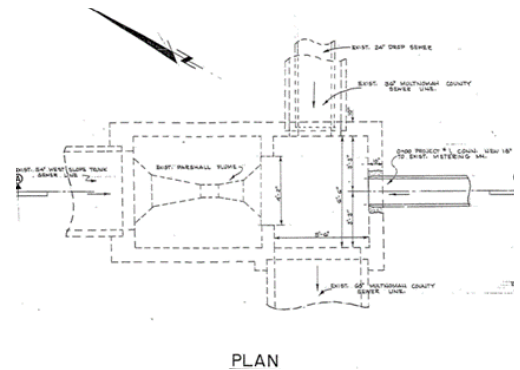


The City combined a safe routes to school project and SCA project into a single project. The improvements included new sidewalk, partial curb and gutter, storm improvements, parking, striping and two controlled pedestrian crossings on Douglas Street in front of the grade school. One of the pedestrian crossings was at the middle school. The street improvements include sidewalk for two blocks on 7th Street, widening of 7th Street to allow two travel lanes for one block, construction of one block of Juniper Street to provide alternative access to a neighborhood, and closing off 8th Street at the intersection with Ivy Avenue due to safety issues with regard to site distance.

# Sanitary Sewer Realignment

## CLEAN WATER SERVICES (CWS), OR

ODOT embarked upon an improvement project on Highway 217 and as part of the design informed CWS that there were potential conflicts. Typically, this means that CWS would need to move their facilities; however, it was determined that the CWS easements predated the highway so ODOT would have to pay for the improvements. Tetra Tech evaluated four potential conflicts and only one needed to be addressed. Tetra Tech then provided the design for the one conflict which include realignment of 60, 54, 36- and 24-inch pipes and manholes with excavations up to 30 feet deep right next to the highway. Bypass pumping was a key issue as all the pipes had to remain in service.



# Waterline Replacement

## LUSTED WATER DISTRICT



The project consists of replacement of 14,670 feet of undersized steel pipe some of which is 60 years old. The pipe is corroded and constantly breaking. The intent of the project is to upsize the pipe with 10- and 12-inch HDPE distribution pipe to reduce water loss and provide for better fire flow. The project is located in Multnomah County in an area that could be described as semi-urban. Several of the streets have significant traffic at high speed, including school routes for the Barlow High School. Tetra Tech is performing design, bidding, limited construction management and inspection. The project included environmental permitting specifically for one overland stretch of pipe, as well as geotechnical investigations.

## CITY KNOWLEDGE

The City of Carlton is a small community in the middle of wine country and it is beginning to grow. As the general economy has improved and as Carlton becomes more of a destination wine center, development has increased. Recently there has been the substantial development including Carlton Crest, Carlton Acres, JR Meadows 1, 2, and 3 subdivisions, and there are several development in process. The existing infrastructure is adequate to serve the community and the growth, but improvements are needed. In general, some of the challenges that the City faces with regard to public infrastructure are as follows:

**Water System:** The City has made significant strides in upgrading the potable water system in the past including a new intake, upgraded treatment plant, new treated reservoir, raw water reservoir dredging, lining the concrete reservoir and piping improvements. Yet there are more improvements required as the 2016 drought event illustrated. A secondary water source would make the City much more resilient. There are also still portions of the community with insufficient fire flow for existing homes and future developments.

The City is actively addressing these issues through funding applications for system improvements and reaching out to MW&L as well as Hillsboro to start conversations concerning water supply. The City is also participating in the Yamhill Regional Water Authority with McMinnville and Lafayette with the intent of obtaining water from the Willamette River in the future.

**Wastewater System:** While the wastewater system is serving the community well, the wastewater facility plan completed in 2018 outlined a number of items that need to be addressed to improve the system and address growth. A new headworks is nearly completed and the WWTP design is nearly completed that will address both biological and hydraulic capacity.

There is 15,800 feet of clay pipe in the community and it was recommended that it be replaced over a 20 year period. The CI force main from the Hawn Creek pump station recently broke and due to the condition and age of the pipe, it needs to be replaced.



Carlton Water Treatment Plant

**Streets:** The City is actively improving the street system to provide better transportation and improve the entrance to the community and main routes through the community. In concert with ODOT, the City is in the process of upgrading Highway 47 within the community. The City is also embarking on an update to the TSP. The City has used the SCA program to fund several pavement improvement projects, and has also been improving the sidewalk system specifically with regard to school access and along the main streets in the community.

While the new developments are constructed to City standards, there are still many streets within the community that are substandard with regard to width, sidewalks, structural section, and surfacing. The City is addressing this in a judicious manner considering funding and livability aspects.

**Storm Drainage:** The community is essentially bounded by the North Yamhill River on the west and Hawn Creek on the east. These are the major drainages and eventually storm drainage in the community discharges to one or the other. The community storm system is not well developed and it can be challenging to address storm drainage in new development. The mercury TMDL program requires that future development in the community include detention and treatment. As part of this implementation, the City is budgeting to update the stormwater master plan.



## WORK SCOPE

The duties of the city engineer involves more than standard public facilities planning and design. This job encompasses a spectrum from broad policy-making down to the details about repairing a cracked sidewalk. These services are provided on an on-call basis as authorized by the City. Based upon our experience in this type of work, the typical services that we might be asked to provide as city engineer generally include the following:

- **Regulatory and Permitting Assistance:** Tetra Tech helps cities deal with existing and new regulatory requirements. The most common and critical issues relate to stormwater and wastewater. This may include renewing the NPDES permit, addressing DEQ correspondence, updating the reuse plan, reviewing proposed permit changes, and coordination with agencies. Recently other regulatory issues have occurred, such as from OHA with regard to service line inventory, and DEQ for the mercury TMDL, which affects stormwater.
- **Development Review:** Tetra Tech team members provide assertive yet fair development review services for many communities. These services include pre-application conferences, completeness checks, condition-of-approval development, staff reports, predesign meetings, design reviews, pre-construction meetings, construction observation, as-built reviews, and plat reviews. Our spreadsheet tools enhance the accountability and responsiveness of development review.
- **Development of Standards:** Tetra Tech team members have helped nine communities develop or update design standards. These establish guidance for how a community will look, how user-friendly it is, and how the community addresses environmental issues. Standards also have an important effect on operation and maintenance requirements and costs. While Carlton already has standards, Tetra Tech is currently engaged in updating the standards.
- **GIS Information:** Updated GIS information is a powerful tool for City staff that is typically created or maintained by the city engineer. Tetra Tech has personnel experienced with creating GIS systems at various levels of detail, from basic AutoCAD maps showing infrastructure and zoning, to interactive GIS mapping software.
- **Development of Ordinances:** Tetra Tech team members have helped communities develop specific ordinances, such as floodplain ordinances, and modify existing ordinances. In many communities, ordinances are developed without input from engineering, which can cause significant challenges and undermine the cohesive development of services. Currently, Tetra Tech is assisting the City updating the development code.
- **Funding Assistance:** Tetra Tech team members have assisted numerous communities in securing funding for infrastructure improvements from sources such as the State Revolving Fund Program, Rural Utilities, OECD Block Grants, IFA programs and other sources. Recently, Tetra Tech has assisted the City in developing cost estimates, project descriptions, and project schedules for multiple funding applications.
- **Agency Coordination:** Every community that we have worked with, regardless of size and location, has intergovernmental agreements (IGAs) with other agencies. The classic agreement for small to mid-sized communities is an IGA with the County and/or ODOT for roads and land use planning. Carlton will also have an IGA for the Yamhill Regional Water Authority system for future water from the Willamette River. Tetra Tech assisted with the development of the IGA with Weyerhaeuser and MW&L for the dredging project, and is assisting in the development of an emergency IGA with MW&L for water.



Aerial View of Carlton

- **Small Design Work:** City engineers often must perform small design jobs, such as installing a sidewalk, lining a section of sanitary sewer pipe, mitigating flooding, overlaying streets, park improvements, or troubleshooting a pump station. These projects are very different from large public works projects, such as a wastewater treatment plant expansions, and the city engineer needs to be flexible to prepare small projects with the appropriate level of effort. Tetra Tech has prepared many small design projects for Carlton.
- **Larger Design Work:** Tetra Tech also has the capability to provide design, bid and construction management services for public works infrastructure projects. Services may include design surveys, right-of-way or easement acquisitions, public outreach, preliminary design reports, plans and specifications, cost estimates, permitting, construction management, record drawings, operation and maintenance manuals, keeping project records, and providing funding agency documentation. Tetra Tech has prepared design and provided construction management on a number of larger projects for Carlton, including the headworks and WWTP upgrade projects that are on-going.
- **Addressing Community Concerns:** Small issues often have great importance to citizens: an eroding creek bank getting close to a manhole; rocks falling on a road; a sidewalk cracking and causing a tripping hazard; a favorite tree earmarked to be taken down; undue traffic going through a neighborhood. Tetra Tech has the city engineering experience to recognize the importance of such issues and to handle them effectively and efficiently.
- **Utility Planning:** Tetra Tech prepares facility and master plans for utilities, and our city engineers provide the additional step of interpreting such plans. This requires fine-tuning shifting priorities, helping to set implementation plans, providing additional evaluations on specific issues, and providing guidance for capital improvement programs.
- **Reporting:** Regular reporting is important for communication and documentation. We provide, at a minimum, written monthly updates for all projects and issues we address as city engineer. In Carlton, we also attend a monthly meeting to review all the various projects, including CIP projects, regulatory requirements, citizen concerns, planning and code documents, as well as development.
- **Council Presentations:** Tetra Tech understands the differences between the perspective of a city engineer presenting information to a City Council and a consulting engineer doing so. The City Council is the decision-making body, and it is the city engineer's responsibility to provide data in a form that will facilitate the decision. This includes showing the advantages, disadvantages, and consequences from an engineering perspective.
- **Policy Setting:** Policy setting is an important task for the City as it guides the development of the community. The city engineer's role in this is to provide technical input to help ensure that policies can be implemented in a reasonable manner with regard to public facilities.
- **Land Use and Zoning Experience:** Tetra Tech staff has assisted cities and land use planners with items such as conditional use permits, variances, completeness checks, UGB expansions, and staff reports. We are familiar with zoning issues, especially with regard to master planning.



Raw Water Reservoir Dredging Project



# PROJECT APPROACH

Tetra Tech has developed an approach to city engineering services that has worked well over that last 30 years. The key components of the approach are as follows:

- Teamwork:** We view ourselves as part of the overall team that helps to operate and maintain the City. Tetra Tech would provide the engineering component and technical data to assist the City. Yet we understand that there are many considerations other than technical engineering that are a part of the decision making. It is a team effort.
- Lead Contact:** We designate a senior engineer with broad experience in public works infrastructure projects to serve as city engineer. This person is the primary contact with the City and directs all work under the city engineering contract. The designated city engineer assigns other staff to perform work assignments as appropriate.
- Back-up Contact:** We provide a second contact person for times when the designated city engineer is not available, such as vacations. This ensures that a contact person is available to the City at all times.
- Appropriate Expertise:** Our team includes experts in the fields that we have found are often required in city engineering, such as sewer and water infrastructure, storm drainage, traffic, geotechnical evaluation, surveying, water rights, finances, parks, and general design. This allows us to respond to any issue that may arise. When additional services are required, Tetra Tech has the depth and breadth of expertise to assist.
- On-Call:** As this is an on-call contract, we do not do any work unless directed by the City. Furthermore, no team member does any work unless directed to do so by the designated city engineer.
- Support Data:** At the beginning of the project, we will provide the City with a list of documents that are needed in order to respond to issues and task orders. This includes items such as city design standards, city ordinances, master plans (water, wastewater, stormwater, transportation, parks), and city maps. In this instance, Tetra Tech already has many of these items as we have been the city engineer for eight years now.

- Start-Up:** At the beginning of the project, we typically propose a start-up meeting with City staff to obtain a briefing on key issues and set up protocols. This may not be required in Carlton as Tetra Tech has been providing interim assistance with city engineering services.
- Quality Assurance Reviews and Peer Reviews:** At appropriate levels of each project (or task) and for every deliverable, Tetra Tech’s QA personnel will separately review work products. The QA personnel will be senior level engineers who are not involved in the day-to-day design of the project in order to provide fresh and experienced eyes.

For large design projects, written comments will be provided and responded to in writing such that there is an internal record. The identified QA personnel will also take part in the internal project start-up meeting, providing input with regard to options, technical aspects, and potential issues that need to be addressed.

For smaller task orders, the QA review may be verbal or red line comments.



- Cost Control:** There are two aspects of cost control on an on-call city engineering type of project. The first is matching the level of service to the City’s requirements and expectations on a task basis. This would be on a smaller task such as investigating permit requirements for a particular improvement. This is accomplished by communication with the City (Shannon and/or Bryan) up front when the task is authorized to ensure that the level of effort is understood. As the work proceeds, the task requirements may change. Before acting upon the changes, we would verify with the City how it is to be handled. The second aspect is on larger projects, such as design of improvements. Cost control is a process that is continual throughout the design and construction of a project. It starts with a good understanding of the budget for a project so that everyone knows the target and perhaps constraints with regard to funding. At each step of the way, from planning through the various design submissions, we provide updated cost estimates. We also provide the cost impacts of decisions, which becomes part of the decision making process. This ties into the QA procedures with the documentation of decisions and review comments. This process provides information in a timely manner such that there are no surprises and modification to the project can be made if required.

We will also identify the potential risks on the project with regard to permitting and potential requirements, as well as the construction risks and potential impacts. This keeps the City up-to-date on what potential impacts are and allows the City to plan accordingly.

- Ability to Meet Schedules:** Schedule is part of every project and every task order. Often times on a smaller task in city engineering, there are very short and specific time frames, such as in the development process. Having provided this type of assistance for many years, we are well aware of this aspect. For land use applications and development review, we use a spreadsheet that tracks the time that submittals are made, due dates, and actual response dates. Not only does this help keep track of the tasks, but provides documentation.

On the large tasks such as design and construction management, we develop an overall schedule and then monitor the schedule on a weekly basis. The schedule would identify specific design stages as well as bidding, contracting, construction, and close out. One of the key elements of this is to track changes and their impacts, and communicate them to the City in a timely manner.



**Carlton Transmission Line Replacement Project.**

The project was on budget, met schedule, and added 2,000 feet of pipe to the project.

# AVAILABILITY

Tetra Tech’s proposed team members are available to start work immediately upon notice to proceed. Each project team member will be able to devote the necessary time to meet the City’s needs.

Tetra Tech has additional staff and resources available from nearly 360 personnel in our Northwest offices and a deep bench of additional staff across the country who are focused on public infrastructure and can be used, if necessary, to complete any project within the required time frame. As noted in the team section, within Tetra Tech we have many disciplines including civil, structural, mechanical, electrical, architectural, permitting and more. This forms the core of the services that are likely needed.

Gordon Munro, our proposed project manager, is experienced with leading and integrating multi-disciplined efforts on numerous work orders. For each assignment, we pool the collective experience and creativity of our diverse team to focus on achieving the goals of each assigned work assignment.

The following table shows the current workload of the core team members and the estimated availability to work on Carlton projects. Availability requirements for an on-call project such as this can be quite variable, but we have shown what we anticipate is required should we be given a specific task order.

Note that each team member has the amount of time available for the needs of the City. Furthermore, with our additional staff across the country, we can flex as needed to support the City.

Core Team Availability	
<p><b>Gordon Munro, PE</b>                      Availability Needed: 25%                      Actual Availability: 35%</p>	<p><b>Current Workload:</b></p> <ul style="list-style-type: none"> <li>- Carlton City Engineering</li> <li>- Lafayette City Engineer</li> <li>- Gervais City Engineer</li> <li>- LWD Waterline Phase 2 Construction Management Support</li> </ul>
<p><b>Matt Huxley, PE</b>                      Availability Needed: 10%                      Actual Availability: 20%</p>	<p><b>Current Workload:</b></p> <ul style="list-style-type: none"> <li>- Donald City Engineer</li> <li>- Hood River Storm Water Design</li> <li>- Osan WTP Pre-Design</li> <li>- Astoria Waterline</li> </ul>
<p><b>Erik Nordholm, PE</b>                      Availability Needed: 20%                      Actual Availability: 20%</p>	<p><b>Current Workload:</b></p> <ul style="list-style-type: none"> <li>- Carlton WWTP Design</li> <li>- Clatskanie WWTP Design</li> <li>- CWS Norwood Pump Station</li> <li>- Wallace Hatchery Design</li> </ul>
<p><b>Hunter Bennett-Daggett, PE</b>                      Availability Needed: 20%                      Actual Availability: 30%</p>	<p><b>Current Workload:</b></p> <ul style="list-style-type: none"> <li>- Carlton Grant Street Sewer Line</li> <li>- Sherwood Ice Age Water &amp; Sewer</li> <li>- Portland BES Polymer System Upgrade</li> </ul>
<p><b>Jesse Fields, PE</b>                      Availability Needed: 20%                      Actual Availability: 30%</p>	<p><b>Current Workload:</b></p> <ul style="list-style-type: none"> <li>- Gaston City Engineer</li> <li>- Carlton Headworks Construction Management</li> <li>- Lafayette Reservoir Construction Management</li> <li>- Astoria Waterline</li> </ul>

## FAMILIARITY WITH CARLTON

Tetra Tech, and specifically the proposed team members (Gordon, Matt, Erik, Hunter, and Jesse), have been providing services in Carlton since 1998 through a series of projects, and have been providing city engineering since 2016.

**Water System Improvements.** Gordon and Erik performed the predesign and design of the water system improvements that were in response to the slide event in the watershed. More recently, Gordon, Matt and Hunter were instrumental in the transmission line replacement, MW&L intertie, clearwell recoating, concrete reservoir upgrade, and distribution improvements.

**Wastewater Facility Plan and Wastewater Upgrade.** Tetra Tech developed both the 2007 and 2018 facility plan. Gordon and Hunter developed the 2018 plan, and Gordon, Erik and Jesse are involved with the WWTP upgrade design, headworks upgrade, and the Hawn Creek pump station upgrade and collection system upgrades.

**Raw Water Reservoir.** Gordon was the lead on a series of projects that included a dredging and

color evaluation, dam raise evaluation, intake replacement and upgrade and the dredging project.

**Development Assistance.** Currently, Tetra Tech is providing development review assistance, which includes attending pre-application meetings, predesign meetings, pre-development meetings, design review, construction observation and project close out. Through this process, Tetra Tech has become familiar with the City code, design standards and master plans.

**Carlton General Assistance.** Currently, Tetra Tech is providing general assistance on various projects, such storm drainage improvements, paving projects, regulatory agency requirements, funding applications and assistance with the civic building.

**Music For Hope.** Gordon participated in the Carlton Police fund raising event, Music for Hope, in 2022 and 2023 providing entertainment through storytelling.

## REFERENCES FOR SIMILAR SERVICES

### City Engineering Services City of Lafayette

Contact: Mr. Branden Dross, City Manager  
503.864.2451 | brandend@ci.lafayette.or.us

### City Engineering Services City of Gervais

Contact: Mr. Kyle Jentzsch, Public Works Supervisor  
503.871.0594 | kjentzsch@cityofgervais.com

### Water and Wastewater Planning and Design (12 Projects) Oregon Military Department

Contact: Mr. Jim Arnold, Environmental Manager  
503.584.3551 | jim.arnold@us.army.mil

### Wastewater Treatment Plant Upgrade City of Clatskanie

Contact: Mr. Greg Hinkelman, City Manager  
503.728.2622 | ghinkelman@cityofclatskanie.com

### City Engineering Services City of Gaston

Contact: Ms. Wenonah Blanchet, City Recorder  
503.985.3340 | wenonahb@cityofgaston.com

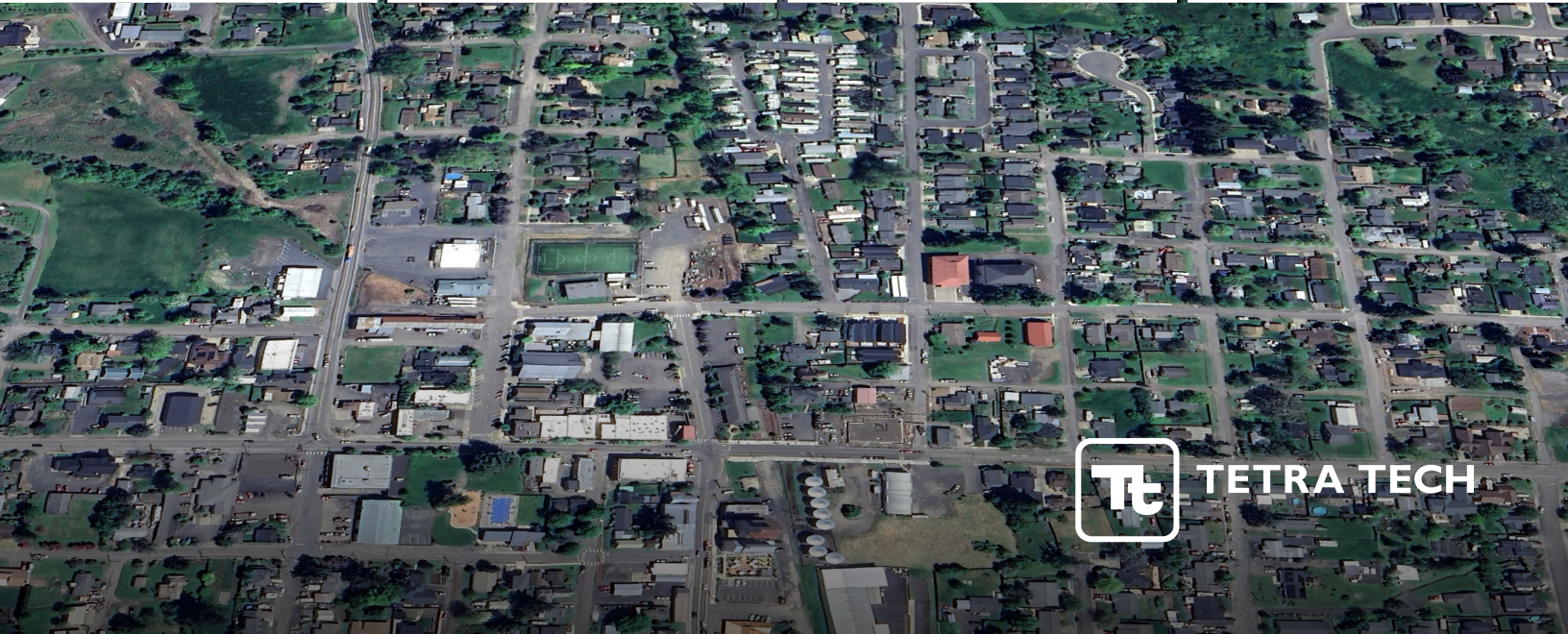
### City Engineering Services City of Donald

Contact: Mr. Eric Underwood, City Manager  
503.678.5543 | manager@donaldoregon.gov





# ATTACHMENT A: RESUMES



# Gordon Munro, PE

City Engineer

*Gordon has been actively involved in the planning, design, and construction of public infrastructure projects in the fields of water, wastewater, storm drainage, and transportation since 1984. He has been city engineer on-contract for eight communities in Oregon over that time, including communities similar in size to Carlton such as Lafayette, Gervais, Rainier, and Scappoose. He has also performed development review services for additional communities. In addition to the city engineering services, his wastewater projects have included 27 studies, and the design for 14 wastewater treatment plants, 19 pump stations, and more than 190,000 feet of pipeline. Water projects have included 30 studies, and the design for 19 reservoirs, 15 water treatment plants, 8 wells, 19 pump stations, 5 intakes, 5 pressure reducing stations, and more than 200,000 feet of waterline.*

*Gordon has also designed multiple street improvement and preservation projects, stormwater improvements, TMDL implementation plans, seven city parks, and assisted with new City Hall and fire station projects. These projects typically include coordination and permitting with multiple agencies such as ODOT, railroads, counties, DEQ, DSL, and the U.S. Army Corps of Engineers, as well as obtaining easements from private landowners.*

## PROJECT RELEVANCE

**City Engineering Services, City of Carlton, OR.** City Engineer. Assists the City with public works facilities and systems including water, wastewater, stormwater, transportation, parks, and other public infrastructure. He attends meetings of the City Council, Planning Commission, Water Committee, and other City meetings as requested; reviews and advises on permits, agreements, ISAs, easements, plans, SDC applicability and other documents pertaining to public works facilities; assists the City planning and budgeting on public infrastructure projects; performs technical evaluations; designs and provides bidding and construction administration assistance on City projects; performs master/facility planning; reviews proposed development documents; assists the City with agency interactions; and assists the City in funding applications for public projects.

**City Engineering, City of Gervais, OR.** City Engineer. Assists the City with public works facilities and systems including water, wastewater, stormwater, transportation, parks, and other public infrastructure. He attends meetings of the City Council, Planning Commission, Water Committee, and other City meetings as requested; reviews and advises on permits, agreements, easements, plans, and other documents pertaining to public works facilities; assists the City planning and budgeting on public infrastructure projects; performs technical evaluations; designs and provides bidding and construction administration assistance on City projects; performs master/facility planning; reviews proposed development documents; assists the City with agency interactions; and assists the City in funding applications for public projects.

**City Engineering Services, City of Lafayette, OR.** City Engineer. Provides technical data, recommendations, and cost estimates to the City in the areas of water, wastewater, storm drainage, and street improvements. Performs technical evaluations, design, and construction management. Gordon assists the City developing the yearly CIP budget and provides advice on SDC applicability. He keeps the City apprised of new regulations and funding opportunities. Projects



### Education

BS, Civil Engineering,  
Oregon State University

### Registrations/ Certificates

Professional Engineer:  
Oregon, No. 14047  
Washington, No. 25996

### Office Location

Portland, OR

### Years of Experience

39



## Gordon Munro, PE

have included Monroe Street sidewalks, 7th and 4th Street overlays, biosolids management plan, emergency response plan, reservoir recoating including temporary storage, well air stripping design, well pump replacement, waterline, sanitary sewer, I/I removal plan, and assistance with the regional water system.

**Development Review Services: Cities of Wilsonville, Forest Grove, Oregon City, West Linn, Scappoose, Rainier, Carlton, Gervais and Canby, OR.** Lead Engineering Reviewer. Provided assistance to the planning and engineering department on development review. This included attending pre-application meetings, review of applications, development of conditions of approval, and design review.

**City Engineering Services, City of Scappoose, OR.** City Engineer. Provided technical data, recommendations and cost estimates to the City in the areas of transportation, water improvements, sanitary sewer improvements, and storm sewer improvements. Provided review of all subdivision design, public improvement designs, and engineering studies. Gordon kept the City apprised of new regulations and funding opportunities. Projects included level one environmental reviews of properties, development of an emergency response plan, development of a well rehabilitation plan, sidewalk design, pole building design, culvert replacement design, UIC registration, storm collection system repair design, review of design standards, coordination with ODOT on highway improvement projects, structural evaluation of tankage, and a park improvement project.

**City Engineering Services, City of Rainier, OR.** City Engineer. Provided technical data, recommendations, and cost estimates to the City in the areas of transportation, water improvements, sanitary sewer improvements, and storm sewer improvements. Provided review of all subdivision design, public improvement designs and engineering studies. Gordon kept the City apprised of new regulations and funding opportunities.

**City Engineering Services, City of Cannon Beach, OR.** Assistant City Engineer. Provided technical data, recommendations, and cost estimates to the City in the areas of transportation, water improvements, sanitary sewer improvements, and storm sewer improvements. Provided review of all subdivision design, public

improvement designs, and engineering studies. Gordon kept the City apprised of new regulations and funding opportunities.

**City Engineering Services, City of Gaston, OR.** Deputy City Engineer. Assists the City with public works facilities and systems including water, wastewater, stormwater, transportation, parks, and other public infrastructure. Assists the City Engineer in all activities providing technical expertise and quality control. Gordon also acts as the second contact when the designated City Engineer is on vacation.

**Development Review Services, City of Hermiston, OR.** City Engineer. Provide technical data, recommendations, and cost estimates to the City in the areas of transportation, water improvements, sanitary sewer improvements, and storm sewer improvements. This included design and construction management for a number of street maintenance projects, a booster pump station, reservoir recoating, park trail, police building modifications, UIC evaluations, stormwater evaluations, and coordination with outside agencies. Gordon provided assistance to the planning and engineering department on development review. This included attending pre-application meetings, review of applications, development of conditions of approval, and design review.

**City Engineering Services, City of Donald, OR.** Deputy City Engineer. Assists the City with public works facilities and systems including water, wastewater, stormwater, transportation, parks, and other public infrastructure. Assists the City Engineer in all activities providing technical expertise and quality control. Gordon also acts as the second contact for those times that the designated City Engineer is on vacation.

**City Engineering Services, City of Banks, OR.** City Engineer. Provided technical data, recommendation and cost estimates to the City in the areas of water and street improvements. Provided review of all subdivision design, public improvement designs, and engineering studies. Gordon kept the City apprised of new regulations and funding opportunities. Work included assistance with rate studies, PGE franchise agreement negotiations, assistance with UGB expansion analysis, and review of ODOT projects, storm drainage issues, water leak detection study, and yearly budgeting.

## Matt Huxley, PE

Senior Engineer Support and QA/QC

*Matt is a registered engineering project manager with 27 years of experience. Matt's background includes managing and supervising a varied staff of employees and subconsultants on geographically and technically diverse projects ranging in scope from small task orders to large capital improvement projects. His project experience includes planning, design, and construction administration for civil engineering projects focusing on site development, roadways, pump stations, water and wastewater treatment, and conveyance. Matt has worked with private industry, local municipalities, state agencies, federal government, and international ports.*

### PROJECT RELEVANCE

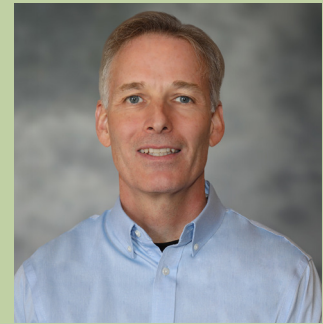
**Carlton Water Transmission Main Line, City of Carlton, OR.** Project Engineer. Project includes final design and construction support for 7-miles of new 12-inch water transmission main lines installed in County road and easements. Project consists of trenchless rehabilitation of original steel pipe, new pipeline design and installed, temporary bypassing, easement acquisition, natural resources permitting through listed species habitat, land-use permitting, and project approval through the Oregon Health Authority.

**Hawn Creek Pump Station, City of Carlton, OR.** Project Engineer. Final design and construction assistance for a major upgrade to a 2.5-MGD sanitary sewer pump station and sewer lines located in a floodplain. Upgrades included new 100-HP submersible pumps, wetwell, valve and piping, instrumentation and controls, automated control system, 100-KW standby generator, and telemetry, along with replacing several hundred feet of gravity sewer and force main in City streets and State highways.

**Water Master Plan Amendment, City of Donald, OR.** Project Manager. The City of Donald commissioned Tetra Tech to prepare an amendment to the Water System Master Plan. This amendment provides an updated population and water demand forecast and an updated Capital Improvement Plan. An amendment was required to address revised population and water demand forecasts due to planned residential development within the City's water service area. Average water production has decreased from 100 gallons per capita per day (GPCD) to an estimated 77 GPCD due to reductions in water losses. Production to meet current peak-day demand has been reduced from 250 GPCD to 193 GPCD. The amendment revised the recommended capital improvements. Revisions include updated cost estimates based on more recent cost data, removed Well No. 2, added a backwash recycle system to reduce water losses, and upgraded electrical service to support new booster pumps.

**Well Siting Study, City of Donald, OR.** Project Manager. Completed a study that identified the best locations for both a new well and another well that will eventually be needed to replace the existing remaining well. These wells must serve the community for decades to come so the study is taking in account future drinking water needs along with the community's preferences.

**MWL Inertie Booster Pump Station, City of Lafayette, OR.** Project Manager. Responsible for design and construction support of a new 1-MGD booster pump station for a new inertie between the City of Lafayette and McMinnville Water and Light.



### Education

BSc, Mechanical Engineering, Glasgow University

### Registrations/ Certificates

Professional Engineer:  
Oregon, No. 60424  
Washington, No. 54622

### Office Location

Portland, OR

### Years of Experience

27

# Geoff Baldwin, PE, BCEE, PMP

QA/QC

*Geoff has over 30 years of professional experience developing water, wastewater, recycled, and stormwater systems and programs. He is well-versed in the complexities associated with the collection and treatment of water and is knowledgeable regarding the key issues associated with distribution and discharge. Recently, he designed and directed several key wastewater treatment facilities, green stormwater and drinking water conveyance programs, and organization effectiveness projects for clients such as the New York City Department of Environmental Protection, Puerto Rico Aqueduct and Sewer Authority, Massachusetts Water Resources Authority, and many other public sector and industrial clients. He specializes in all aspects of water infrastructure, including project management/oversight, biosolid management, risk management/mitigation, green infrastructure design, water environment design, system modernization, process engineering, mediation, and facilitation. His chief goal is to offer his clients design improvements that will be delivered timely, sustainable, easily integrated across systems, and adaptable for future improvements.*

## PROJECT RELEVANCE

**WWTP Improvements, City of Clatskanie, OR.** Project Manager. Three-phase design improvement plan. Phase 1 consists of SBRs, post EQ tank, electrical/control room, standby generator, existing sludge drying shed, process support equipment, aerobic digester, and site design to bring WWTP above the 100-year flood elevation. Phase 2 consists of headworks and the UV system. Phase 3 includes final upgrades including demolition of existing facilities, new control building and lab, new garage, effluent filters, solids handling building and sludge drying bed. At 95-percent design, a cost estimating and value engineering review will establish construction cost to determine what phases can be constructed within the City's budget.

**Wilsonville WWTP Improvement Triennial Asset Inspection, City of Wilsonville, OR.** Project Manager. Conducted an asset condition assessment and audit of maintenance, repair and replacement of the City's 406 wastewater system-managed assets at the WWTP and nine remote wastewater lift stations.

**North Digesters 1 and 2 Coating and Roof Repair, City of Salem, OR.** Project Manager. Inspection and design for digester roofs, columns, and draft tubes. Design includes construction drawings and details, specifications, opinion of probable construction costs, and bidding documents for general construction to repair items found deficient during initial inspections. Support to construction manager and general contractor during construction of repairs and general construction management services.

**WWTP SBR Upgrade and Environmental Permitting, Clatskanie, OR.** Project Manager. Designing and permitting a plant upgrade. Existing plant is an approximately 45-year-old "donut-style" plant originally designed to provide treatment through contact stabilization. Over its life cycle, it was modified with additional sludge handling systems, headworks treatment for screenings and grit, and UV disinfection.



## Education

MBA, Finance and Operations Management, New York University-Stern School of Business

MS, Environmental Engineering University of Massachusetts

BS, Civil Engineering, Tulane University

## Registrations/Certificates

Professional Engineer:  
New York, No. 073044  
Washington, No. 20114663  
Oregon, No. 95548  
Connecticut, No. 0024938  
Virginia, No. 0402038550

Project Management Professional

Board Certified Environmental Engineer (BCEE)

## Office Location

Portland, OR

## Years of Experience

32

## Erik Nordholm, PE

Engineering Support

*Erik has 26 years of experience in the design and construction of municipal infrastructure projects. He has been involved in the design of treatment pump stations, and pipelines. Erik has extensive experience in hydraulic modeling for water distribution systems, pump stations, force mains, and hydraulic transients. He is proficient in the use of AutoCAD Civil 3D software for site grading, roadway, and pipeline design.*

### PROJECT RELEVANCE

**Main Street Utility Improvements, City of Carlton, OR.** Project Engineer. Design, bidding, and construction assistance for improvements to utilities on Main Street in preparation for the Oregon Department of Transportation Main Street Improvements project. Improvements included upgrades of 400 feet of 8- to 10-inch waterline from Kutch to Pine; 2,200 feet of sanitary sewer main from Pine to Monroe; sanitary sewer line replacement from Yamhill to Pine; and moving overhead private utilities off Main from Yamhill to Pine.

**WWTP Improvements, City of Carlton, OR.** Project Engineer. Design of improvements includes effluent submersible pump station with two 300-GPM pumps for irrigation and two 1,700-GPM pumps for winter discharge to the river. Project includes a new wet well, valve vault and controls, an 18-inch pipe from pump station to the river (approx. 2,000 feet), an outfall to river including a two-port diffuser, extending 48-inch pipe used for chlorine contact chamber by 125 feet (providing new chlorine disinfection and dichlorination equipment including a small prefabricated fiberglass building), sixteen 3-HP aerators, raising lagoon dike by one foot and providing new piping, a larger splitter box, irrigation piping and discharge system, a prefabricated 10-foot x 14-foot maintenance building, access road improvements, and SCADA system.

**Water System Improvements, City of Carlton, OR.** Project Engineer. Provided the design for 10,000 feet of 16-inch water transmission line and a 1-MG steel treated water reservoir. Assisted in the design and drafting of a new 1-MGD treatment plant and clearwell/reservoir for the treatment of high turbidity raw waters, which reach as high as 6,000 NTU due to slides in the watershed.

**Monroe Street Improvements, City of Carlton, OR.** QA/QC. Asphalt pavement overlay to 16,100 SF of residential street; 600 SF of sidewalk replacement; installed 8 new or replacement ADA curb ramps; installed ditch inlet and 10-inch storm drain pipe on East Monroe Street; asphalt pavement inlay to 15,500 SF on West Lincoln Street and North Howe Street and installed three new or replacement ADA curb ramps; asphalt pavement inlay to 3,200 SF on South Cunningham Street; asphalt pavement inlay to 4,200 SF on South Carr Street; asphalt pavement inlay to 2,100 SF to create a crown on West Washington Street; asphalt pavement inlay to 500 SF on West Taylor Street.

**City Engineering Services, City of Gervais, OR.** Project Engineer. Assisting with engineering issues for the town, including streets and drainage, water and sewer systems, and funding of improvements.



#### Education

BS, Civil Engineering,  
Oregon State University

#### Registrations/ Certificates

Professional Engineer:  
Oregon, No. 57186

#### Office Location

Portland, OR

#### Years of Experience

26



# Jesse Fields, PE

Engineering Support

*Jesse has over nine years of planning, design, and construction administration experience on water, sewer, and stormwater projects, including site civil engineering, reservoirs, wells, pump stations, and piping projects. He has provided as-needed project design support and quality control reviews for public works projects. He has experience with design and construction projects subject to jurisdictional plan review as well as completing engineering plan review on behalf of local jurisdictions. Jesse has provided city engineering services for the Cities of Willamina, Amity, and Silverton; and he is currently serving the cities of Carlton, Lafayette, and Donald.*

## PROJECT RELEVANCE

**On-Call Professional Engineering Services, City of Carlton, OR.** Assistant City Engineer. Construction management for WWTP headworks upgrade, including submittal RFI review, on-site observation, pay request review, and tracking work progress. Updating Public Works Design and Construction Standard details in support of mercury TMDL requirements and code updates for the City.

**City Engineering Services, City of Lafayette, OR.** Assistant City Engineer. Grant application support for the Small City Allotment. Construction drawings for addition of an insertion valve on City's primary water transmission main. Preparing cost estimates for three street improvement projects to upgrade gravel streets to City standard sections. Leading construction services for the new 500,000-gallon reservoir project.

**City Engineering Services, City of Donald, OR.** Assistant City Engineer. Development of stormwater master plan.

**City Engineering Services, City of Gervais, OR.** Assistant City Engineer. Development of Public Works Design and Construction Standards for the City. Updating City design standards to be a comprehensive document that also incorporates the unique needs of their public works system.

**City Engineering Services, City of Willamina, OR.** City Engineer. Review of development applications and construction documents, presenting technical information at City Council and Planning Commission meetings as needed, and active participation throughout the land-use process. Participation with planning commission to review and modify development code, grant application support, easement review, coordinated survey of City-owned property, park improvement concept support, and general drainage support. Efficiently designed interim raw water intake mechanical improvements constructed by the City. Provided planning and design support for many capital improvement projects such as evaluation, analysis, and preliminary costs for improvement of the City's two primary sanitary lift stations; QC review of water pump station improvements and transmission pipeline; and QC review of raw water intake facilities and pipeline. Served as city engineer with progressing responsibilities for seven years.

**Gaston Engineer of Record, City of Gaston, OR.** Engineer-of-Record. Engineering services for public work facilities including water, wastewater, stormwater, roads, parks, and other city infrastructure.



### Education

BS, Environmental Engineering, Oregon State University

### Registrations/ Certificates

Professional Engineer: Oregon, No. 91548

### Office Location

Portland, OR

### Years of Experience

9

# Hunter Bennett-Daggett, PE

Engineering Support

*Hunter has nearly 20 years of expertise in the design, permitting, and construction of wastewater and water projects including treatment facilities, pump stations, sewer conveyance systems, water distribution systems, and fisheries. He has also worked on design upgrades for wastewater and water treatment facilities as well as addressing permit compliance issues at municipal and private wastewater treatment facilities.*

## PROJECT RELEVANCE

**City Engineering Services, City of Carlton, OR.** Project Engineer. Assisting with general city engineering services, including design, cost estimating, and development plan review. Municipal projects include sidewalk, street, and stormwater improvements. Private development projects include street water supply.

**Main Street Utility Improvements, City of Carlton, OR.** Project Engineer. Designed upgrades to 400 feet of 8- to 10-inch waterline from Kutch to Pine and 2,200 feet of sanitary sewer main from Pine to Monroe, plus replaced all sanitary sewer lines from Yamhill to Pine and moved overhead private utilities off Main Street from Yamhill to Pine.

**WWTP Improvements, City of Carlton, OR.** Project Engineer. WWTP design improvements including an effluent submersible pump station that has two 300-gpm pumps for irrigation and two 1,700-gpm pumps for winter discharge to the river. Project includes a new wet well, valve vault and controls, an 18-inch pipe from the pump station to the river approx. 2,000 feet, an outfall to the river including a two-port diffuser, extending the 48-inch pipe used for the chlorine contact chamber by 125 feet (new chlorine disinfection and dichlorination equipment including a small prefabricated fiberglass building), sixteen 3-hp aerators, raise lagoon dike by one foot and provide new piping, a larger splitter box, irrigation piping and discharge system, a prefabricated 10' by 14' maintenance building, access road improvements, and a SCADA system.

**City Engineering Services, City of Lafayette, OR.** Project Engineer. Assisting with general city engineering services including design, cost estimating, and construction management. Projects include water supply, wastewater treatment, stormwater, park, sidewalk, and street improvements.

**City Engineering Services, City of Donald, OR.** Project Engineer. Assisting the City with public works facilities and systems including water, wastewater, stormwater, transportation, parks, and other public infrastructure.

**Wastewater Facilities Plan Update, City of Carlton, OR.** Project Engineer. Updated the Wastewater Facilities Plan prepared by Tetra Tech in 2007. Project included regulatory requirements analysis, planning area statistics, existing and proposed wastewater facilities and operation, wastewater flow and load projections, collection system deficiencies, and options for increasing irrigation flows during summer months to dispose of additional treated effluent. The City's WWTP includes lagoons, chlorine disinfection, a winter outfall to the North Yamhill River, and summer effluent disposal using agricultural land irrigation.

**City Engineering Services, City of Gervais, OR.** Project Engineer. Assisting with general city engineering services including design and cost estimating for municipal projects. Projects include transportation, stormwater, and water supply improvements.



### Education

BS, Civil/Environmental Engineering, Worcester Polytechnic Institute

### Registrations/ Certificates

Professional Engineer:  
Oregon, No. 88278  
Washington, No. 58114

### Office Location

Portland, OR

### Years of Experience

19



# Ryan Maas, PE, SE

Structural Engineer

*Ryan has participated in a wide variety of structural engineering projects, including failure investigations, structure inspections, condition assessment, and repair of existing structures and building envelopes. His experience includes project management, design, preparation of plans and specifications, and construction cost estimating as well as providing construction support services. His work at Tetra Tech has included project management, detailed structural design, condition assessment, and planning of a variety of structures for municipalities and fisheries associations throughout the Northwest, including remote regions of Alaska. Projects include structural design of water distribution structures for hatcheries, fish ladders, weirs, pipe racks, parks and recreation facilities, pedestrian bridges, and buildings, as well as design of water and wastewater storage, treatment and pumping facilities, and industrial facilities.*

## PROJECT RELEVANCE

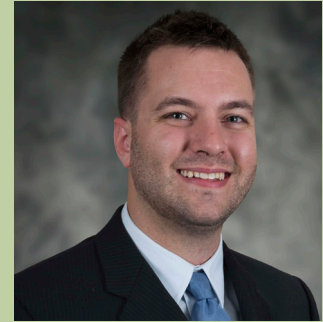
**City Hall and Police Station Renovation, City of Carlton, OR.** Lead Structural Engineer. Study to determine the feasibility of renovating the existing City Hall building and relocating the Police Station into an adjacent commercial use building. Conducted a site visit to assess the condition of the structures and a report prepared to make recommendations regarding feasibility of renovation and anticipated requirements for structural and seismic upgrades required for essential facilities.

**Kotzebue Water Treatment Plant, City of Kotzebue, AK.** Structural Engineer. Design of a new water treatment plant. The primary structure is a pre-engineered metal building that provides space for treatment equipment, chemical storage, vehicle storage, and a shop. A mezzanine within the metal building provides space for a control room, break room and a mechanical space. Challenges included designing a foundation to accommodate the permafrost at the project site. The foundation system consists of a thickened edge concrete mat foundation on a passively cooled refrigerated pad.

**Lake Fenwick Hypolimnetic Aerator Improvements, City of Kent, WA.** Lead Structural Engineer. Design of a floating aeration structure and modifications to an existing concrete building to support installation of new aeration related equipment. Modifications to the existing building included raising the roof three feet, increasing the roof slope, and implementing a standing seam roof system to reduce maintenance.

**Banks Pump Station Upgrade, Clean Water Services, Banks, OR.** Lead Structural Engineer. Design of upgrades to the Banks Sanitary Sewer Pump Station. The project included a new precast wetwell and vault, cast-in-place reinforced concrete lids for the wetwell and vault, and a new steel canopy to support and protect electrical equipment.

**Newby Elementary School Canopy Damage, McMinnville School District, McMinnville, OR.** Lead Structural Engineer. Condition assessment and recommendations for repair to a damaged canopy at an existing school. A truck struck the canopy damaging the canopy, brick veneer, and structural wood wall framing. Conducted a site visit to document the damage and report prepared to make recommendations for the extent of repair.



### Education

MS, Structural Engineering,  
University of Washington

BS, Civil Engineering,  
Illinois Institute of Technology

### Registrations/ Certificates

Structural Engineer:  
Oregon, No. 48239PE  
Washington, No. 52441

Professional Engineer:  
Oregon, No. 94244PE  
Washington, No. 52441

### Office Location

Seattle, WA

### Years of Experience

14

# John Rice, PE, LEED AP

Electrical Engineer

*John is a senior electrical engineer and project manager with over 32 years of experience in industrial, commercial, and municipal projects. He has completed over 50 instrumentation and control projects for water, wastewater, solid waste, and commercial/industrial clients. John provides a broad range of engineering design, management, and construction administration skills, including extensive experience in power systems, lighting and illumination, and special systems design. His technical expertise includes design of medium-voltage draw-out metal-clad switchgear for multiple projects and using both vacuum and air-insulated style circuit breakers. John has extensive experience in planning critical power cutovers in essential facilities (Qwest Communications, data centers, courthouses, wastewater treatment plants, hospitals, etc.) where minimal downtime is a crucial element of the project. He has been an associate member of the Illuminating Engineering Society of North America since 1992, and is a U.S. Green Building Council (USGBC)-certified LEED Accredited Professional.*

## PROJECT RELEVANCE

**On-Call Professional Engineering Services, City of Carlton, OR.** Lead Electrical Engineer. Assisted with public works facilities and systems including water, wastewater, stormwater, transportation, parks, and other public infrastructure. Specific projects have included: Main Street sidewalk design that includes seven blocks of sidewalk, curb and gutter and street widening; predesign for 5th Street improvements, assistance with the skate park, IFA funding application.

**City Engineering Services, City of Lafayette, OR.** Lead Electrical Engineer. Provided technical data, recommendation, and cost estimates to the City in the areas of water, wastewater, storm drainage and street improvements. Performs technical evaluations, design, and construction management. Also keeps the City apprised of new regulations and funding opportunities. Specific projects have included: Monroe Street sidewalks, 7th and 4th Street overlays, vector truck waste receiving station, biosolids management plan, emergency response plan, reservoir recoating including temporary storage, well air stripping design, well pump replacement, I/I removal plan, and assistance with the regional water system.

**WWTP Improvements, City of Clatskanie, OR.** Lead Electrical Engineer. Three-phase design improvement plan. Phase 1: SBRs, post EQ tank, electrical/control room, standby generator, existing sludge drying shed, process support equipment, aerobic digester, and site design to bring WWTP above the 100-year flood elevation. Phase 2: Headworks and UV system. Phase 3: Final upgrades including facility demolition, a new control building and lab, new garage, effluent filters, solids handling building and sludge drying bed.

**Port Hadlock Wastewater System Final Design, Jefferson County, Port Hadlock, WA.** Lead Electrical Engineer/Engineer-of-Record. Final design of the WWTP and collection system (new 90,000-GPD water reclamation facility and influent pipeline) for Port Hadlock core area.

**Winslow WWTP Improvements, City of Bainbridge Island, WA.** Electrical Engineer. Plant upgrades for future wastewater flows and to maintain NPDES WW Discharge Permit.



### Education

BS, Electrical Engineering,  
Oregon State University

### Registrations/ Certificates

Professional Engineer:  
Oregon, No. 48239PE  
Washington, No. 35735

LEED Accredited Professional

### Office Location

Bothell, WA

### Years of Experience

32

## Mitch Graf, PE

Mechanical Engineer

*Mitch is an experienced mechanical engineer with a focus on commercial, municipal, and federal building construction projects. His areas of expertise lie in the areas of heating, ventilation, air conditioning, and plumbing design. He is highly proficient in the use building information modeling (BIM) software such as Revit and drafting programs such as AutoCAD.*

*Mitch is a mechanical discipline leader and provides training on load and energy modeling software such as Trane Trace as well as providing guidance to junior staff on design practices, standards, and advanced mechanical systems. He has a familiar knowledge of the building construction codes such as the: International Code Council Mechanical, Plumbing, Building, Energy Code, and Fuel Gas Codes, NFPA, Unified Facilities Codes and American Society of Heating, Refrigeration, and Air Conditioning Engineers Publications.*

### PROJECT RELEVANCE

**Inverness Wastewater Pump Station, City of Portland Bureau of Environmental Services, OR.** Senior Mechanical Engineer. Construction documents for demolition of all HVAC systems and design of NFPA-compliant exhaust/ventilation systems. Due to the wet environment and building construction (dry well open to electrical and control room above), 100-percent outside air ventilation system was a packaged dx and electric heat air handling unit located outside on grade. Provided an opinion of probable cost. Provided new ductwork and controls for ventilation and exhaust fans.

**Little Goose and McNary Dams, Gate Repair Pit Renovations, Army Corp of Engineers-Walla Walla District, OR and WA.** Engineer-of-Record/Lead Mechanical Engineer. Scope included site visits to two hydrodynamic dams on the Snake River (OR and WA) and assessing the current condition of the HVAC systems (and lack thereof) serving the 7-plus-story-tall gate repair pits in the dams. Developed a basis of design report to propose improvements to local exhaust for welding, grinding, and painting, and to the overall make-up air and exhaust systems.

**Water Treatment Plant Air Handler Replacement, City of Ann Arbor, MI.** Mechanical Lead. During SCADA control room renovations, the need to improve HVAC systems was identified. Initiated a study phase to determine space to be conditioned and unit size. Design included evaluation of ultraviolet disinfection and air ionization to improve air quality. Identified construction sequencing to conduct work during the spring when outside air was a moderate temperature. Led WTP staff training for new unit and control systems.

**Water Pump Stations, Phosphate, Electrical and Instrumentation Upgrades, Kalamazoo, MI.** Mechanical Engineer. The City retained Tetra Tech to design upgrades to the phosphate storage, chemical pumps, and antiquated instrumentation and electrical controls at 15 pump stations. Improvements included potential changes to the chemicals the City uses for corrosion control. Tetra Tech designed an automated system to allow for real-time measurement of chemicals in the water and treatment of the water. Tetra Tech conducted a coupon testing program using copper, lead, and ductile iron coupons at four pump stations.



#### Education

BS, Mechanical Engineering, Virginia Polytechnic Institute and State University

#### Registrations/ Certificates

Professional Engineer:  
Oregon, No. 91407PE

#### Office Location

Ann Arbor, MI

#### Years of Experience

23

# Marcel Bodsky, RA

Architectural

*Marcel has over 30 years' design experience with a variety of building types and clients. His experience designing multi-building facilities is extensive; his designs for public works infrastructure include wastewater, water rail and bus transit facilities, parking garages and maintenance facilities. His experience covers all phases of project development, including planning, programming, design, and construction. Marcel's expertise in managing contracts, dealing with contract issues and delivering on projects includes multiple on-call work order contracts with Transit agencies and Port Authorities.*

## PROJECT RELEVANCE

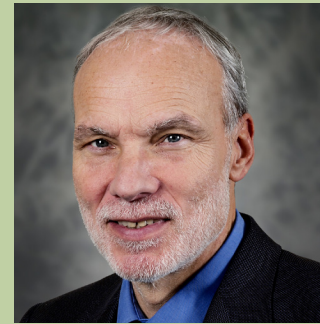
**Pacific Northwest Maintenance and Welfare Facilities, AMTRAK, Seattle, WA.** Design Manager and Architect. Design build partnership with PCL construction to construct (2) 60,000 SF buildings; an administrative and warehouse facility (Welfare Building) and a Maintenance facility for the Talgo, Cascade and Amtrak lines for Amtrak. The Maintenance building provides wheel truing, wheel changing and general maintenance facilities for Amtrak and Talgo trains at the Holgate yard just south of Safeco field. The four-story Welfare Building provides administrative offices as well as high bay storage of inventory. The project was fast track and won the 2013 DBIA National Award for Transportation projects.

**Northwest Region Traffic Management Center, WSDOT, Shoreline, WA.** Lead Architect and Design Manager. The lead architect and design manager for the 17,500 SF design-build project with PCL as the contractor. The facility boasts a state-of-the-art control room with video wall, media observation room and Emergency Operations Center, all with a high degree of acoustic control and damping. Directed Tetra Tech team for architecture and interiors, structural, civil, and landscape design services.

**Charleston Base Expansion, Kitsap Transit, Bremerton, WA.** Project Manager. Project manager for the renovation and expansion of Kitsap Transit's Charleston Base in Bremerton WA. The \$3.6M project includes a partial renovation of the existing operations building, expansion of the site into an adjacent street vacated by the city of Bremerton, a new touchless wash building, and a new fueling building combined with a light maintenance bay.

**On Call Architectural/Engineering Services, Port of Seattle, WA.** Contract/Project Manager. Marcel was the Contract Manager and Project Manager for the A/E on call for the Port of Seattle. Task orders included structural evaluation of the existing custom window wall in the SeaTac food court, evaluation of fall protection systems at existing port properties, and evaluation of existing port managed and owned elevators and escalators.

**Everett Transit Parking Garage, City of Everett, Everett, WA.** Project Manager and Project Architect. Tetra Tech teamed with KPFF on the design of the Everett Transit Parking Garage project, which is currently at 30% design stage. Tetra Tech provided Transit design coordination and integration, architectural site design, electrical, lighting and mechanical design for the project. Marcel directed the transit integration and site design aspects of the project. The City of Everett is currently pursuing Federal construction funding.



### Education

BA, Architecture, University of Washington

### Registrations/ Certificates

Architect:  
Washington; 7006  
Alaska: A 14623  
California: C35520

### Office Location

Seattle, WA

### Years of Experience

30



# Lesley Martinez, EIT

Primary Local Support

*Lesley supports professional staff designing water-related infrastructure and providing construction phase services. Lesley has monitored construction deliverables and compliance requirements; supervised field work performed by the contractor for verification, quality, and safety purposes; assisted the survey crew in outdoor assignments to gather data for quality assurance; and completed general daily progress reports and pay notes to keep track of and pay for the work performed by the contractor. She creates, modifies, and reviews engineering cost estimates and contract specifications.*

## PROJECT RELEVANCE

**Water Transmission Main, City of Carlton, OR.** Designer. Assisted with design for replacement of a portion of the transmission pipe from the water treatment plant to the treated water reservoirs and creating the erosion and sediment control plan. The project included design of 35,000 feet of transmission pipe.

**City Engineering Services, City of Donald, OR.** Designer. Providing assistance to the acting city engineer in the areas of water, wastewater, storm drainage, and street improvements.

**City Engineering Services, City of Gervais, OR.** Designer. Providing assistance to the acting city engineer for public works facilities and systems, including water, wastewater, stormwater, transportation, parks, and other public infrastructure.

**City Engineering Services, City of Lafayette, OR.** Designer. Providing assistance to the acting city engineer in the areas of water, wastewater, storm drainage, and street improvements.

**ODOT Waterline, City of Lafayette, OR.** Designer. Assisted with lowering 1,800 feet of 6- to 12-inch waterline along with service lines on Third Street (Hwy 99W), including erosion control, traffic control, disinfection, temporary service and facilities, testing, and permitting. Provided construction inspection to ensure contractor met requirements set by construction drawings and contract specifications.

**WWTP Improvements, City of Carlton, OR.** Designer. Design improvements include: effluent submersible pump station with 300-GPM pumps for irrigation and two 1,700-GPM pumps for winter discharge to the river; a new wet well, valve vault and controls; an 18-inch pipe from the pump station to the river (2,000 feet); an outfall to river, including a two-port diffuser; a 125-foot extension of 48-inch pipe used for the chlorine contact chamber (providing new chlorine disinfection and dichlorination equipment including a small prefabricated fiberglass building); sixteen 3-HP aerators, raising lagoon dike by one foot; providing new piping; a larger splitter box; irrigation piping and discharge system; a prefabricated 10-foot by 14-foot maintenance building; access road improvements; and a SCADA system.

**City Hall Parking Lot, City of Carlton, OR.** Designer. Designed and developed specifications for a new 7,000-SF parking lot for public and private use. Project included installation of new concrete sidewalk and curb, stormwater management features, landscaping, irrigation, lighting, and an automatic security gate.



### Education

BS, Civil Engineering,  
University of Portland

### Registrations/ Certificates

FE Environmental, Oregon

### Office Location

Portland, OR

### Years of Experience

5

# Katelin Vandehey, EIT

Primary Local Support

*Katelin provides engineering and AutoCAD support to senior project managers for water, wastewater, stormwater, and street projects. Her past experience includes construction inspection, intersection upgrades, pedestrian safety improvements, and upgrades for water treatment plants. She is proficient with Office 360, ArcGIS, and AutoCAD.*

## PROJECT RELEVANCE

**Grant Street Sewer Improvements, City of Carlton, OR.** Designer. Assisting with plan and profile drawings and details. The project consists of replacement of the existing clay pipe from Pine Street to the public works building/headworks. Work includes review of the capacity; inspect manholes to see if they need to be replaced or rehabilitated; replace the services to the property line and put a clean-out at the property line; prepare a set up plan/profile sheets, standard detail sheets (trench, CO, MH, service line, surface restoration, erosion control); and prepare a cost estimate.

**Water Reservoir Dredging, City of Carlton, OR.** Designer. Provided construction administration assistance for dredging the raw water reservoir and creation of a forebay. Project included site survey, bathymetric survey, wetland delineation, dredging of the disposal site and permitting.

**WWTP Improvements, City of Carlton, OR.** Designer. Design of improvements including pump stations, pipelines, outfall, aerators, splitter box, irrigation, access road, and SCADA.

**Main Street Utility Improvements, City of Carlton, OR.** Designer. Assisted with design, bid, and construction phases for improvements to utilities on Main Street in preparation for ODOT Main Street Improvement project. Improvements included upgrades to 400 feet of 8- to 10-inch waterline from Kutch to Pine, 2,200 feet of sanitary sewer main from Pine to Monroe; replacement of all sanitary sewer lines from Yamhill to Pine; and relocation of overhead private utilities off Main from Yamhill to Pine.

**WWTP Improvements, City of Clatskanie, OR.** Designer. Engineering and AutoCAD support for improvements being designed in three phases. Phase 1: SBRs, post EQ tank, electrical/control room, standby generator, existing sludge drying shed, process support equipment, aerobic digester, and site design to bring WWTP above the 100-year flood elevation. Phase 2: Headworks and UV system. Phase 3: Finalization of upgrade by demolishing facilities, adding new control building and lab, new garage, effluent filters, solids handling building and sludge drying bed. At 30-percent design, cost estimating and value engineering reviews establish construction cost to determine what phases can be constructed within the city's budget.

**Waterfront Stormline Improvements Best Management Practices, City of Hood River, OR.** Designer. AutoCAD support to relocate waterfront storm system from private property into public right-of-way. Provided designs for several ADA ramps to ensure compatibility with rain garden installation (best management practices). Project site split by I-84. Portion north of I-84 includes 3,000 LF of 10- to 18-inch pipe, 3,000 feet of 18- to 36-inch pipe, multiple catch basins, a relocated stormwater outfall to the Columbia River, and mechanical treatment for stormwater quality.



### Education

BS, Civil Engineering,  
Oregon State University

### Registrations/ Certificates

Engineer-in-Training:  
Oregon, No. 100494

### Office Location

Portland, OR

### Years of Experience

3



# Ava Zobelein, EIT

Primary Local Support

*Ava has six years of experience as an environmental designer, primarily working with water, wastewater, and stormwater systems. She has designed a river water intake and water treatment plant, which included plate settlers, dual media filters, booster pumps, and a chlorine contactor for disinfection. She has produced engineering reports and environmental assessments to meet USDA-Rural Development and state funding requirements, coordinating with over 30 local, state, federal, and tribal agencies for regulatory and design input, and designed a new wellhouse, chlorine contactor, and deep well pump system to meet future city water demands.*

## PROJECT RELEVANCE

**City Design Standards, City of Carlton, OR.** Engineering Support. Updating the City design standards to be a comprehensive document that also incorporates the unique needs of their public works system.

**City Engineering Services, City of Donald, OR.** Engineering Support. Providing technical data, recommendation, and cost estimates to the City in the areas of water, wastewater, storm drainage and street improvements. Performs technical evaluations, design, and construction management.

**Water Transmission Main, City of Carlton, OR.** Engineering Support. Design, bid assistance, and construction administration/inspection for replacement of 35,000 feet of transmission pipe from WTP to treated water reservoirs. Rehabilitated 2,000 feet of pipe using CIPP due to access and constructability issues.

**City Engineering Services, City of Lafayette, OR.** Engineering Support. Providing technical data, recommendation, and cost estimates to the City in the areas of water, wastewater, storm drainage and street improvements. Performs technical evaluations, design, and construction management.

**Water Reservoir Dredging, City of Carlton, OR.** Engineering Support. Design, bid assistance, and construction administration for dredging raw water reservoir and creation of a forebay. Work included site and bathymetric survey, wetland delineation, dredging of disposal site, and permitting. Project identified disposal site and included multiple meetings with Weyerhaeuser along with a land entry agreement.

**City Engineering Services, City of Gervais, OR.** Engineering Support. Providing technical data, recommendation, and cost estimates to the City in the areas of water, wastewater, storm drainage and street improvements. Performs technical evaluations, design, and construction management.

**Hawn Creek Pump Station, City of Carlton, OR.** Project Support. Design, bidding, and construction management/inspection of two pump stations and force main lines to bypass above-ground sewer line. One pump station placed near an intersection and First Street: the other at the foot of an embankment.

**Clearwell Recoating, City of Carlton, OR.** Engineering Support. Interior coating removal of 0.3-MG welded steel clearwell tank, surface preparation, application of primer and new coatings for steel surfaces; surface preparation, application of primer and new coatings for exterior of the clearwell tank; replaced roof access hatch seal, applied a non-skid surface to clearwell roof, replaced screen to clearwell vent, and installed a tank base sealing to outside of clearwell tank; and repainted above-ground process piping and pressure vessels located indoors at the City's WTP.



## Education

MS, Environmental Engineering,  
Oregon State University

BS, Environmental Engineering,  
Oregon State University

## Registrations/ Certificates

Engineering Intern:  
Oregon, No. 89156EI

## Office Location

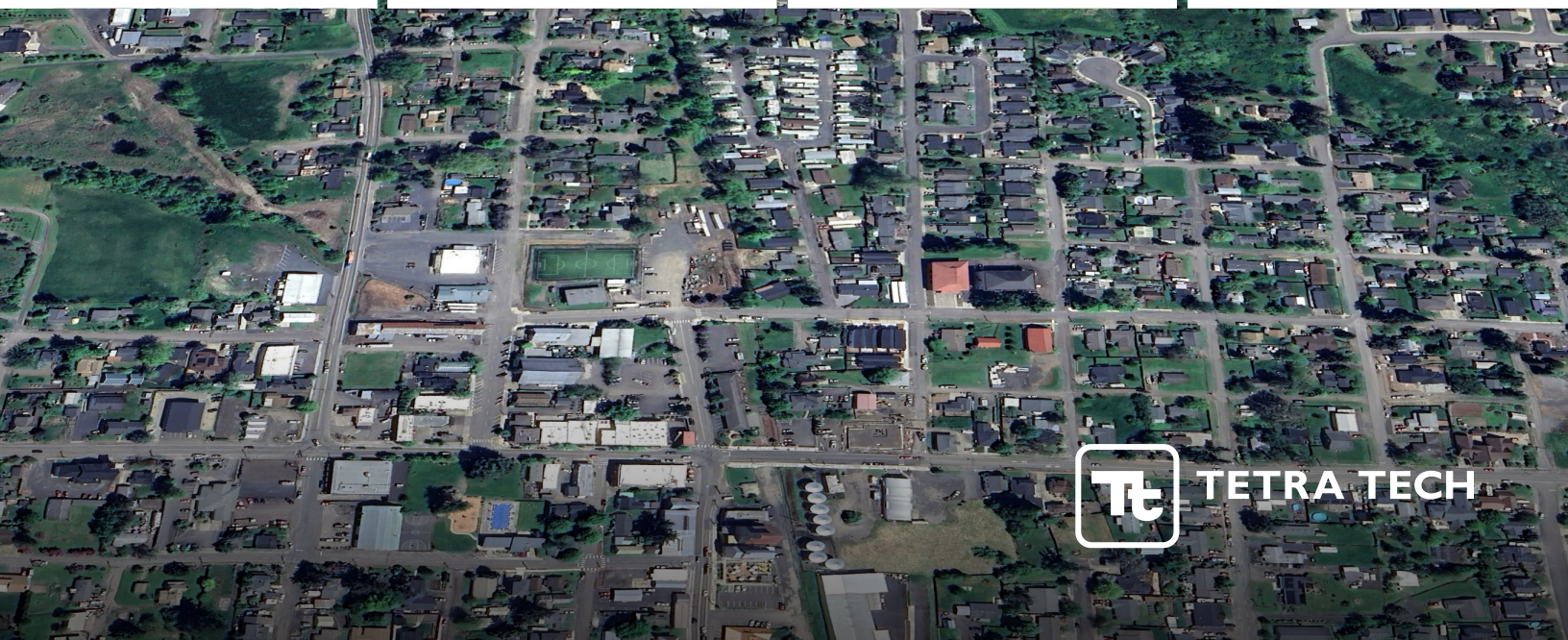
Portland, OR

## Years of Experience

6



# ATTACHMENT B: PROOF OF INSURANCE





# PROOF OF INSURANCE



## CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)  
09/21/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Aon Risk Insurance Services West, Inc. Los Angeles CA Office 707 Wilshire Boulevard Suite 2600 Los Angeles CA 90017-0460 USA	<b>CONTACT NAME:</b>	
	<b>PHONE (A/C. No. Ext):</b> (866) 283-7122	<b>FAX (A/C. No.):</b> (800) 363-0105
<b>E-MAIL ADDRESS:</b>		
<b>INSURED</b> Tetra Tech, Inc. 240 Continental Drive, Suite 200 Newark DE 19713 USA	<b>INSURER(S) AFFORDING COVERAGE</b>	
	<b>INSURER A:</b> American International Group UK Ltd AA1120187	
	<b>INSURER B:</b> Allied World Surplus Lines Insurance Co 24319	
	<b>INSURER C:</b> Zurich American Ins Co 16535	
	<b>INSURER D:</b>	
	<b>INSURER E:</b>	
<b>INSURER F:</b>		

**COVERAGES**      **CERTIFICATE NUMBER:** 570101620642      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.      **Limits shown are as requested**

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
C	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> X, C, U Coverage GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:			GL0181740605	10/01/2023	10/01/2024	EACH OCCURRENCE \$2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$2,000,000 GENERAL AGGREGATE \$4,000,000 PRODUCTS - COMP/OP AGG \$4,000,000
C	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY			BAP 1857085 05	10/01/2023	10/01/2024	COMBINED SINGLE LIMIT (Ea accident) \$5,000,000 BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$100,000			62785232	10/01/2023	10/01/2024	EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	WC254061605 AOS WC185708705 WI	10/01/2023	10/01/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE-EA EMPLOYEE \$1,000,000 E.L. DISEASE-POLICY LIMIT \$1,000,000
B	Environmental Contractors and Prof			03120276 Prof/Poll-Claims Made Cov SIR applies per policy terms & conditions	10/01/2023	10/01/2024	Each Claim \$5,000,000 Aggregate \$5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 Stop Gap Coverage for the following states: OH, ND, WA, WY.

<b>CERTIFICATE HOLDER</b>  Tetra Tech, Inc. 13350 SW Sequoia Parkway, Suite 220 Portland OR 97224 USA	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE  <i>Aon Risk Insurance Services West, Inc.</i>

Holder Identifier : 179

Certificate No : 570101620642





CITY ENGINEERING  
SERVICES

2024



TETRA TECH





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**To:** The Mayor and Members of the City Council  
**From:** Aimee Amerson, City Recorder  
**Subject:** Community Room Discussion  
**Council Goal:** Goal 3: Citizen Involvement  
**Date:** April 2, 2024

## Background

Starting at its November 2023 meeting the Mayor and Council began discussions regarding public utilization of the community room. Discussions ranged from birthday parties to HOA meetings, trainings, and yoga space.

Based upon the information received from Council, the team has continued to draft an outline of a policy document and application. This is a working document that will change as Council continues to discuss policy aspects of the room's use. We utilized the examples provided at the November, December, and January's meetings to incorporate Council's discussions into this draft outline.

Staff proposes that this Community Room application is used for one-time or larger scale events. To meet the needs for non-profits and community organizations to use the room as a meeting space, staff recommends using the City of Carlton Business License application. Currently, non-profit organizations submit the license application, but do not pay a fee. Staff proposes that non-profit/community organizations pay the annual business license fee of \$50.00, and included in that fee is the ability to use the community room. They would have to reserve it ahead of time, but they would not have to complete the Community Room application to reserve it for a monthly meeting. They would only complete an abbreviated Use Agreement, similar to our Park Reservation application upon room reservation.

Attached is a draft Community Room application. Please note that fees are included in this draft. Staff compared fees with to other municipal facilities fees in order to provide a recommended option to Council.

## Exhibits

Draft Community Room application (all changes since last meeting are in red.)



Working Document  
Draft Community Room Policy Outline & Application

### 1. Making a Reservation:

The Community Event Center is available for rental seven (7) days a week. The hours for use are 8:00 am to 11:00 pm. For rental availability contact the City of Carlton during business hours at 503-852-7575.

- a. All reservations require submission of a Community Room Reservation Application (Application). The person signing the application must be present at the function and will be responsible for ensuring the room use policies and procedures are followed. Applicants must be 21 years of age or older. The completed Application and rental fee(s) must be received a minimum of twenty-one (21) business days prior to the requested rental date. The City will let the applicant know if the Application is complete and approved within two (2) business days when all Application documents are received.

When required, the refundable security deposit(s) are due a minimum of fourteen (14) business days in advance of the rental date.

- b. The City of Carlton will accept facility reservations no more than one year in advance. Reservations for more than one year in advance may be reviewed on an individual basis.

### 2. Rental Fees:

The rental rates shown are hourly rates. Fees charged will be based on one (1) hour increments. The minimum reservation period is three (3) hours. **Reservation periods include setup, event, and clean-up time.**

- a. The entire facility is handicap accessible with handicap-accessible restrooms.
- b. Rentals are for indoor spaces only.
- c. Use of the parking lot area for anything other than parking purposes requires a Right of Way permit.

Room	Capacity*	Group 1 Hourly Rate	Group 2 Hourly Rate
Community Room and Entry/Hall	Banquet: 80 Theatre: 80 Standing: 100	\$60 per hour w/a minimum of \$175 for all room configurations	\$120 per hour w/a minimum of \$350 for all room configurations
Kitchen	8	\$25 per hour	\$25 per hour
Entry/Hall open space		Included, but only available w/ weekend rentals only.	Included, but only available w/ weekend rentals only

**\*Please note - Capacities may be limited by the facility depending on the situation and room setup.**

Working Document  
Draft Community Room Policy Outline & Application

Set up Descriptions:

- Banquet – Table and chairs set up facing same direction
- Theatre – Chairs set up in same direction facing same direction
- Bare Floor/Standing – No tables or chairs set up

**Deposits and Fees:**

Security Deposit	\$250.00	Key Deposit	\$20.00
Alcohol Use Fee	\$125.00/3-hour minimum	Staff Fee*	\$60.00/hour
Kitchen Use Fee	\$ 75/3-hour minimum	Police Fee*	\$60.00/hour

*(not a commercial kitchen; for prep use only)*

Equipment Fees (in addition to deposit and room use fees)

Tables- \$25                      Chairs- \$25                      AV equipment- \$50

\*Additional staff fees may be incurred if the event is outside of regular business hours or setup/teardown/event staffing is required. Additional charges will also be incurred if the Police must respond to the event.

**Group Classifications:**

Group 1: Carlton Residents and Non-Profit Organizations.

- Residency is determined by providing a copy of Driver's License or Carlton utility bill with the application.
- Non-profit rentals will be required to provide a current federal tax non-profit number to qualify for the non-profit rate.

For purposes of determining group classification:

- Resident: An individual whose primary residence is within the city limits of Carlton.
- An incorporated legal non-profit organization with a current federal tax non-profit number.

Group 2: General Public

- Individuals located outside of the city limits of Carlton and profit organizations.

**3. Submitting an Application:**

- a. The Application, room rental fee, room set-up plan, and security deposit must be received by the Civic Center Main Office at least twenty-one (21) days before the requested rental date. Email or faxed applications will not be considered. Cash, Check, Visa, or Mastercard may be used to make a rental fee payment. Please make checks payable to City of Carlton.

Working Document  
Draft Community Room Policy Outline & Application

- b. **Applicants must be 21 years of age or older.**
- c. Applicant must provide a current Federal or State approved picture identification at the time of application.
- d. The Application will be considered confirmed and final only when signed by an authorized City of Carlton staff member, is submitted with a signed Community Room Application, including any addenda, all fees and deposits are paid in full, and accompanied by all required documentation, including insurance coverage.
- e. The Application is not transferable.
- f. The person who signs the facility use permit is responsible for assuring compliance with these policies and for payment of all fees, charges, and deposits concerning the rental.
- g. *The Applicant will be considered the person in charge for the rental of the facility. To reduce the possibility of confusion, all correspondence will be sent to the email and mailing address for the Applicant listed on the Application. All communication with the City of Carlton will be through the Applicant regarding the use(s) on the Application.*
- h. The Applicant is asked to name an Authorized Back-up Person. The Back-up Person is only able to pick up the facility key, attend the walk-through for the Applicant and be present at the event in Applicant's absence. The Applicant is responsible for all other aspects of the facility rental.
- i. Either the Applicant or the Authorized Back-up Person MUST be present at all times during the use of the facility. If either of these people is not present anytime during the event set up, clean up or event operation, the event is subject to immediate closure.
- j. Applicant may appeal any City administration decision to deny a request for use of the Community Room to the Carlton City Council.

**4. Security Deposit:**

- a. A refundable security deposit is required for all events. The deposit is due a minimum of twenty-one (21) business days in advance of the rental date and must be accompanied by the completed and signed Application. A refund of the security deposit is based on whether ALL policies and procedures have been followed.
- b. Civic Center management will determine the amount of the security deposit to be refunded based on the Applicant's checklist and input from the City of Carlton staff, janitorial service provider, and/or police that were present at the event.
- c. If the City of Carlton keeps any portion of the deposit, a listing of how the deposit was applied will be provided to the renter along with the remaining balance of the deposit should there be any. Deposits will be refunded via check

Working Document  
Draft Community Room Policy Outline & Application

within three (3) weeks of the event or within three (3) weeks of cleaning and repairs being completed.

**5. Cancellations and Refunds:**

- a. Please submit cancellations no less than 5 business days prior to the scheduled event. A **\$120 service charge** (*equivalent to 2 hours of staff time*) to cover administrative costs processing and approving the Application, will be retained for each cancellation. Room rental fees will be forfeited if an event is cancelled with less than five (5) business days' notice.
- b. Inclement weather may cause late opening, early closure and/or cancellation of class, activity, and rental. If the facility is closed due to inclement weather, all rentals will be cancelled.
- c. The City of Carlton reserves the right to terminate any Application at any time with or without cause.
- d. The City of Carlton reserves the right to pre-empt any scheduled use for official City business.
- e. The City of Carlton reserves the right to make further stipulations for use prior to approving an Application.
- f. Termination of facility use due to unruly behavior or participant's conduct violating any local, state, City code or facility laws, rules or regulations will cause all fees and deposits to be forfeited.

**6. Revoked or Denied Use:**

- a. If there is any indication of rental under false pretext, or that the facility will be used for or to promote illegal activities.
- b. For any activity prohibiting admission based on race, religion, ethnic group, sex, or national origin.
- c. For any activity by the same sponsor if the charges for a previous activity have not been paid.

**7. Attendance:**

- a. Please be as accurate as possible when you estimate attendance for your event. The number of people allowed into the facility will be limited to the number you indicated on your application. City Staff or Carlton Police may deny access to the facility if the number of people in attendance exceeds the original estimate and/or capacity limits.
- b. One Chaperone will be required for every fifteen (15) youths under the age of 18. Chaperones must be at least 21 years of age. A list of Chaperones may be requested before the event by the City.

Working Document  
Draft Community Room Policy Outline & Application

**8. Facility Key:**

- a. Applicant is responsible for picking up the facility key during Civic Center business hours on the last business day before the event and returning the key in the drop slot of the Civic Center immediately after the event.
- b. Failure to lock the facility after event use and any lost or late key return will result in the Key Deposit being forfeited.

**9. Insurance Certificate Requirement**

- a. In order to protect both the renter and the City of Carlton, a certificate of insurance is required at events where there will be 35 or more people in attendance and/or whenever alcohol is being served or sold. A certificate of insurance can be secured from most homeowners insurance policies at no extra charge.
- b. The insurance Certificate MUST have the following information:
  - o Insurance policy should be for no less than \$1,000,000.00.
  - o The City of Carlton; 191 East Main Street, Carlton, Oregon 97111 must be listed as an additional insured.
  - o The policy must state that the event will be held at the Civic Center Community Room located at 191 East Main Street, Carlton OR 97111.
  - o Date of event must be listed on the certificate.

If you are unable to obtain an insurance certificate from your insurance provider, you can get information or a quote by going online to:

<https://www.theeventhelper.com#8SVCJA>.

**10. Safety Requirements:**

- a. Exits shall not be obstructed in any manner and shall remain free of any material or matter where its presence would obstruct or render the exit hazardous. This means do not block doors with furniture or equipment, decorations, etc., so they cannot be used as an exit in the event of an emergency.
- b. The building shall AT NO TIME be left unlocked and/or unattended. Doors shall not be propped open.
- c. No City equipment or furniture shall under any circumstances be removed from the facility.
- d. Climbing on furniture is prohibited.
- e. The City accepts no responsibility for the safety of foods prepared or stored on site.

Working Document  
Draft Community Room Policy Outline & Application

- f. The Civic Center abuts a residential neighborhood. We ask renters to respect the neighborhood and to act accordingly.
- g. The Civic Center has a parking area that should be utilized. In the case where on-street parking is needed, we ask that you be respectful of private property and do not block or park in residents' driveways.
- h. The sale and use of tools, equipment, or other items that could damage tables or floors in the building is prohibited (examples: heavy or sharp items, used or new items that contain grease or oil, caustic chemicals).
- i. Weapons are prohibited inside and outside of the Civic Center building and campus, including but not limited to, knives, handguns, rifles, shotguns, pellet guns and bb guns, this includes the use and/or sale of such items.

**11. Security:**

- a. All City and County ordinances and Oregon State Laws govern the Civic Center use, building, grounds, rooms, and occupants.
- b. City Staff, City, County or State law enforcement officers shall have the right to attend any function for inspections, complaint investigation, etc., and have the right to terminate the use of these facilities during any function should the participant's conduct violate any local or state laws, regulations, or codes (including noise) and/or they feel that the rental event has become unruly. In such instances, all fees and deposits will be forfeited.
- c. The applicant agrees to acknowledge rules and regulations by signing the appropriate form at the time of Application.

**12. General Information/Security Deposit Refund:**

All conditions must be followed for the continuation of room use privileges and /or security deposit refund:

- a. We prohibit nailing, tacking, taping, or stapling to any walls or surfaces. All decorations and rental items must be removed at the end of an event. We are not responsible for items left behind.
- b. All decorations must be flame-retardant and comply with Fire Marshal regulations.
- c. Rice, birdseed, glitter, or confetti type products are not allowed.
- d. The reservation is only for the approved room or space(s) listed on Application. This does not include additional areas, i.e. conference rooms, etc.
- e. Use of open flames and candles are not allowed.
- f. Red colored food or beverages may not be served in carpeted areas.



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Draft Community Room Policy Outline & Application

- g. Smoking is not permitted in the facility or within ten (10) feet of any opening, door, or window.
- h. Alcoholic beverages may be consumed on premises with prior authorization and fee payment. See the Alcohol and Tobacco Use section for more details.
- i. Rentals will not end later than 11:00 pm.
- j. Amplified sound is not permitted outside of the building. Amplified sounds may be used within the building but must not disturb other Civic Center users or surrounding neighbors.
- k. All sound amplification must end at 10:00 pm. Music and any sound amplification must be kept at levels that do not disturb the reasonable peace and quiet of any citizen.
- l. Doors and windows must always remain closed when any sound amplification devices are being used, which includes but is not limited to, live music, PA systems, disc jockeys, radios, stereos, or any other sound amplifying devices.
- m. Equipment, supplies, or other products belonging to private groups may not be stored in the facility or on the grounds before the applicant's function/event.
- n. Facilities must be cleaned immediately following the event. The facility must be left undamaged. The facility, including flooring, must be left clean and the furniture in the original configuration and condition. For complete information refer to your rental and cleanup agreement portion of the Community Room Application.

### **13. Alcohol and Tobacco Use**

- a. Alcohol use is permitted inside the Civic Center building. Additional fees and insurance will be required.
- b. Consumption or the use of alcoholic beverages is prohibited outside the Civic Center building or on any public premises adjacent to it.
- c. Events where alcohol will be served or sold require an OLCC Licensed Server. The OLCC licensed server must always be present during the event and proof of certification and Federal or State Issued Photo ID will be required at the time of Application.
- d. Beer, wine, and champagne are allowed to be served or sold within the Civic Center building. **Red Wine is not to be served, sold, or consumed in carpeted areas.**
- e. Events that allow the use of alcohol without the proper insurance certificate, an OLCC Licensed server and/or payment of the correct deposit amounts will

Working Document  
Draft Community Room Policy Outline & Application

- be subject to immediate termination and all fees and deposits will be forfeited.
- f. Smoking and/or tobacco use is prohibited in the Civic Center building and on public premises adjacent to the building including but not limited to the area surrounding the facility and the parking lot in accordance with Oregon Revised Statutes (ORS 433.850).

**14. Closing Procedures:**

All persons must leave the premises and cleanup must be completed no later than the end of the rental agreement period or 11:00 pm, whichever comes first. If the building is not vacated by the agreed-upon time, additional rental fees may be charged, and future usage of the facility may be denied. Time exceptions will be reviewed on an individual request basis.

Before leaving the facility please ensure:

- a. The building is left as you found it.
- b. All windows and doors are closed and locked (unlocked doors and windows will result in deposit forfeit).
- c. All lights are shut off, remember to check bathrooms.
- d. All tables and chairs are wiped down and put back on the racks.
- e. Garbage is bagged and placed where City Staff instruct. New garbage bags should be placed in garbage cans if available.
- f. All carpeting is vacuumed.
- g. Floors are swept.
- h. Check that you have not left any items behind.

**15. In Case of an Emergency:**

- a. *For facility entry and/or key card problems, please call:* \_\_\_\_\_
- b. For all other facility issues, please contact YCOM at 503-434-6500. YCOM will contact the on-call city representative to assist.

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Draft Community Room Policy Outline & Application

**Community Room Reservation Application**

Organization/ Individual Requesting Use:

\_\_\_\_\_

Event Date: \_\_\_\_\_ Day of Week: \_\_\_\_\_

Event Type and Title: \_\_\_\_\_

Hours of Reservation: \_\_\_\_\_ to \_\_\_\_\_ **(Must include set-up and clean-up)**

Actual Event Start/End Time: \_\_\_\_\_ to \_\_\_\_\_

Room(s) Requested: \_\_\_\_\_

Expected Attendance: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Email: \_\_\_\_\_

FOOD SERVICE AND ALCOHOL: (Please circle your response)

Is food being served? YES NO If yes, will the event be catered? YES NO

Is alcohol being served? YES NO

Do you require the rental of the kitchen? YES NO

If yes, you must complete and sign a separate OLCC alcohol application and pay the Alcohol Usage Fee.

ROOM SET UP:

Will you be doing your own set up? YES NO

Do you require City Staff to set up? YES NO

Please attach the Civic Center for room layout(s) to Application.

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Draft Community Room Policy Outline & Application

I understand and agree that I may forfeit my deposit if it is necessary for City of Carlton Staff or janitorial service, to extensively clean or repair facilities following our facility use, or if during the course of my rental I fail to enforce facility policies stated and those that may be presented to me by City of Carlton Staff before or during my event. I understand that variations in rental times and room requests, needs, or uses, may necessitate rental fee adjustments. I agree to assume full responsibility for the conduct of my guests, members and employees or third parties hired to provide services to my group or myself. I understand that my event must be conducted in accordance with the regulations set forth in these documents and if a violation is to occur that all violators may be required to leave, and my event may be terminated immediately in its entirety. I further agree to indemnify, defend, and hold harmless City of Carlton for any damage, injury, suits, or claims which may arise from intentional acts, negligence or omissions of the group, its guests, members, employees or third parties hired to provide services for the group.

**RENTAL CLEAN-UP AGREEMENT**

To receive full refund of the cleaning deposit(s), the rented area(s) will be left free of debris. The floor will be swept and free of food. Spills will be wiped up before leaving. All tables and chairs will be wiped down and cleaned. All bottles, cans and trash will be removed from the facility at the end of the event and placed where staff instructs. There are recycling bins and trash cans just outside the back of the facility. The Civic Center prohibits nailing, tacking, taping, or stapling to any of the walls or surfaces. The City of Carlton is not responsible for items left behind. All decorations and rental items must be removed from the facility immediately following the event. This includes flowers, votives, and cake stands. Please be aware that there is an additional charge for damage done to any surfaces, equipment, or flooring and is subject to additional charges and loss of deposit(s). This is a smoke free facility. Please make guests aware they must go outside to smoke.

The contents of the above arrangements meet with my approval. I consider our contract definite and confirmed.

Customer/Renter Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Facility Representative: \_\_\_\_\_ Date: \_\_\_\_\_

**\*No equipment or furniture shall under any circumstances be removed from the facility\***

Working Document  
Draft Community Room Policy Outline & Application

For Staff use only:

\_\_\_ Group 1 fees to be charged

\_\_\_ Group 2 fees to be charged

Copy of Federal or State ID attached    YES            NO

Deposits (Note amount and date paid)

Community Room Deposit: \_\_\_\_\_

Kitchen use Deposit: \_\_\_\_\_

Total deposit charges: \_\_\_\_\_

Other Fee charges (Hourly rate totals)

Room Rental Fee: \_\_\_\_\_

Kitchen Fee: \_\_\_\_\_

Staff fee: \_\_\_\_\_

Police fee: \_\_\_\_\_

Alcohol fee: \_\_\_\_\_

Equipment fees (list all equipment and fees):

\_\_\_\_\_  
\_\_\_\_\_

Total other fee charges: \_\_\_\_\_

Date deposits and fees paid: \_\_\_\_\_

Staff Review and Approval: \_\_\_\_\_ Date: \_\_\_\_\_

Staff Notes:



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## Memorandum

**To:** The Mayor and Members of the City Council  
**From:** Tyler C. Yeoman-Millette, City Attorney  
**Subject:** Recreational Immunity Update  
**Council Goal:** Goal 4: Good Governance  
**Date:** April 2, 2024

## Recommendation

Update Only

## Background

I will present an update on Recreational Immunity following the 2024 Legislative Session.

## Exhibits

None



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## Memorandum

**To:** The Mayor and Members of the City Council  
**From:** Shannon Beaucaire, City Manager  
**Subject:** General Ledger Request  
**Council Goal:** Goal 4: Good Governance  
**Date:** April 2, 2024

## Recommendation

After review and discussion, the team requires Council direction on how to proceed with this request.

## Background

On Friday, March 15, the City Manager received the following request from Councilor Brandão:

*Hi Shannon and Christy,*

*I want to ensure the general ledger to budget report is fixed for the next city council meeting. Furthermore, I would like to see the complete general ledger included in the package. The complete general ledger should have accounts like the bank account, credit cards, and all accounts in the city's accounting system. Since we are moving to receive the package digitally, it would be ideal to obtain those in Excel so they can be easily checked by using filters and searches.*

*Thank you,  
Guilherme*

Between Sunday, March 17 and Wednesday, March 20, Councilor Brandão and the City Manager exchanged the following emails to provide clarification and research for the April 2 Council meeting.

## March 17<sup>th</sup>

*Hello Councilor Brandao,*

*We have been working on the report since you brought it to our attention. Our system has reports built within it that can be modified within the parameters the system allows. I apologize for last month's report. While we check the packets prior to release, sometimes busy eyes see what they know should be there and don't catch that what should be there is in actuality something different on paper/screen. We cringe when it happens, reminding us with all of the interruptions to try to slow down.*

*The reports, like many other reports, once they have been tweaked a number of times stop responding as they were originally intended. We are working with the system reports to find a good report that captures the information concisely and we don't have to create a customized report.*

*Regarding your request for the general ledger with all accounts in excel, I will place that on the April Council Agenda. I have copied the Mayor and Council President so that they are aware of the request. I*

## March 17 continued

*The Mission of the City of Carlton is to safeguard and enhance the vitality and livability of the community by providing essential services with professionalism and integrity.*

*will research the time and any costs associated for you and the Council discussion. To assist my research, can you tell me if you found another city that does this? I know you had mentioned Salem in another conversation around budget, and if they do this, I would like to talk to the City Manager about their experience, process, software they utilize, etc.*

*Thank you for your assistance in getting research for this request for Council discussion.  
Shannon*

**March 18<sup>th</sup> - Councilor Brandão to City Manager**

*Hi Shannon,*

*Downloading a general ledger to Excel is a standard feature of all accounting systems I have seen. Otherwise, it would make things like auditing very cumbersome. If the accounting system cannot give me a report in Excel, a PDF report works. I don't want to cause any extra cost.*

*Thank you,*

**March 18<sup>th</sup> - City Manager to Councilor Brandão**

*Good morning Councilor,*

*Thank you for the clarification regarding cost. I look forward to the April Council discussion.*

*Shannon*

**March 18<sup>th</sup> - City Manager to Councilor Brandão Follow-Up**

*Councilor,*

*As I continue to look into the request and what it would entail, can you please review the financial portal downloads to Excel <https://www.ci.carlton.or.us/finance/page/financial-portal>. Can you please advise what you feel is missing so I can continue my research into the request? Also, did you have another City that you have spoken to that does this, that I can reach out to?*

*Thank you,*

*Shannon*

**March 20<sup>th</sup> - Councilor Brandão to City Manager**

*Hi Shannon,*

*I looked at the portal, and it has a lot of information, but it is not organized like a general ledger report. A general ledger is not usually a report that companies or governments make public because it has more detailed information.*

*Here is a link to the city of Eugene talking about the general ledger - <https://www.eugene-or.gov/107/Financial-Reports>*

*This is a basic accounting report every accounting system has, and I hope it is not difficult to get. For the April meeting I would like to see the March general ledger report.*

Due to the timing of the request, the City Manager does not have the research available at the time of Council Packet publication. The Council will receive a report at the meeting with the above-requested information.



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## Memorandum

**To:** The Mayor and Members of the City Council  
**From:** Shannon Beaucaire, City Manager  
**Subject:** Lower Park Dog Leash Requirements  
**Council Goal:** Goal 4: Good Governance  
**Date:** April 2, 2024

## Recommendation

After review and discussion, it is recommended that the Council determine which future meeting to begin discussions on this issue.

Forecasted Council Agendas:

### May

- Development Code Public Hearing
- FY25 Budget Adoption
- Recology Rate Review (tentative)
- Community Room Discussion

### June

- Development Code Ordinance – 2<sup>nd</sup> Hearing
- Community Room Discussion

July – Cancelled for relocation of staff to Civic Center

## Background

On Friday, March 15, the City Manager received the following request from Councilor Brandão:

*Hi Shannon,*

*I want to address the unknown, which is the lower park dog leash requirements, before the lower park officially opens. If the lower park is a dog park where off-lease dogs are allowed, we should be clear about it and have signs, but we should not have an unofficial dog park. We should not have an off-leash dog park, but if we do, more information needs to be provided about the park.*

*I want to change the language on 12.12.020 C code of ordinance from: "No dogs allowed on sports field and play structure areas in Wennerberg Park. In the Upper Park dogs must be on a leash. Any person failing to clean up after their dog is subject to a five hundred dollar (\$500.00) fine." to "In the Upper Park and Lower Park/All parks dogs must be on a leash. Any person failing to clean up after their dog is subject to a five hundred dollar (\$500.00) fine." I would like this to be discussed at the next city council meeting.*

*Thank you,  
 Guilherme Brandão*



The City Manager received a further request on Monday, March 18 for:

*"Does the city have any data on dog incidents/complaints in the parks and the whole town? From the police department for instance, and how can I obtain it?"*

The City Manager responded that they would look at pulling that information for the Council meeting, otherwise it would be a public records request.

On Wednesday, March 20, the City Manager received confirmation that the information they could pull was sufficient and asked to include the attached article in the Council packet.

Due to the timing of the request, the team does not have information available at the time of publication and will report to the Council at the meeting with the above-requested information.

### **Alternatives**

Discuss and make a decision on lower park dog leash requirements at the April 2, 2024 Council meeting.

### **Exhibits**

Article: Benefits and Conflicts: A Systematic Review of Dog Park Design and Management Strategies

Review

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# Benefits and Conflicts: A Systematic Review of Dog Park Design and Management Strategies

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Shuolei Chen, Zhuoran Wu, Ole Russell Sleipness and Hao Wang

Special Issue

Human-Wildlife Conflict and Coexistence in Urban Environments

Edited by  
Prof. Dr. Laura A. Reese



<https://doi.org/10.3390/ani12172251>

Review

# Benefits and Conflicts: A Systematic Review of Dog Park Design and Management Strategies

 Shuolei Chen <sup>1,\*</sup> , Zhuoran Wu <sup>1</sup>, Ole Russell Sleipness <sup>2</sup> and Hao Wang <sup>1,\*</sup>
<sup>1</sup> College of Landscape Architecture, Nanjing Forestry University, Nanjing 210037, China

<sup>2</sup> Department of Landscape Architecture and Environmental Planning, Utah State University, Logan, UT 84321, USA

\* Correspondence: shuoleichen@njfu.edu.cn (S.C.); wh9816@126.com (H.W.)

**Simple Summary:** Dog parks contribute physical and social benefits for both canines and their owners, especially during and since the COVID-19 pandemic. However, dogs in public places can create various conflicts. Growing numbers of scholars have explored strategies for effective park design and management. This systematic study synthesizes and analyzes the benefits, conflicts, and strategies for the design and management of dog parks according to the PRISMA guidelines. Based on the summary of conflicts between canines, humans, and their environment, we present design and management guidance for dog parks to effectively mitigate these conflicts while enhancing the benefits of off-leash areas. While this study promotes a sustainable and healthy coexistence of canines and residents of built environments through appropriate design and management strategies, several research and practice gaps have been identified from the results, such as the dearth of experimental evidence and limitations of the physical benefits of dog parks. These research gaps provide opportunities for experts to address in future.

**Abstract:** Dog ownership and dog walking brings various health benefits for urban dwellers, especially since the COVID-19 pandemic, but trigger a number of controversies. Dog parks have become increasingly significant public resources in the pandemic to support these benefits while facing intense conflicts. To develop effective dog parks in urban settings, growing numbers of scholars have provided insights into the design and management strategies for addressing the benefits and conflicts. The objective of this study is to synthesize and analyze various aspects of dog park design and management and to assess identified strategies for enhancing their benefits while mitigating their drawbacks. Following the PRISMA guidelines, a systematic study was conducted to synthesize the benefits, conflicts, and management strategies of dog parks, supported by Citespace. Benefits and conflicts in dog park design and management have been synthesized and organized according to their frequency of presence and the statistical results. We analyzed and assessed existing design and management strategies. Through this systematic study, we discovered the need to obtain more experimental evidence on effective dog park design and management to enhance their benefits while mitigating their sources of conflict and limitations in the intensity of park visitors' physical activity in off-leash areas. Guidelines for the design and management strategies for effective dog parks were made to enhance their benefits while alleviating conflicts in the future development of sustainable dog parks that promote healthy relationships between canines and residents in urban built environments.

**Keywords:** dog ownership; dog park; dog walking; health benefits; off-leash area; physical activity



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## 1. Introduction

### 1.1. Dog Ownership and the Impacts

Dog-ownership accounts for a significant proportion of households across countries [1]. A high proportion of dog ownership provides various benefits, including increased physical activity [2,3], social and mental health benefits [4,5], reduced cardiovascular risk [6], and

all-cause mortality [7], as identified by both experimental studies and systematic reviews. During and since the COVID-19 pandemic and the associated lockdowns, restrictions, dog ownership, and attachment have been found to be related to fewer mental and physical health issues [8–12]. Additional studies documented the health benefits of owning dogs for various groups, including children [13,14], the elderly [15], and populations with disabilities [16,17]. However, in the meantime, the presence of domestic dogs in urban areas is subject to various environmental and social conflicts arising from the presence of dog feces [18] and conflicts between dog owners and non-dog owners in public open spaces [19,20].

### *1.2. Growing Demands for Dog Parks*

While many countries and cities retain strict regulations for dogs in public spaces, the prevalence of dog ownership and both its positive and negative impacts amidst increasing urban densities, highlight the need for safe and controllable environments for dogs and their owners. Given this situation, the development of dog parks therefore has emerged a solution. A dog park is defined as a designed off-leash area offering opportunities for people and their dogs to socialize and exercise legally [21,22]. Most dog parks are built within larger urban parks although some created as stand-alone parks [23,24]. Dog parks are a feasible option for satisfying the physical and social needs of dogs and their owners, while providing separation for non-dog owners who may be offended by dogs. However, minimizing the issues commonly found with dog parks inevitably relies on effective design strategies [23]. The COVID-19 pandemic has resulted in a significant increase in dog park visitation [25]. The growing need for dog parks has shown a need for research that analyzes the benefits and issues of dog parks for the benefit of scholars, designers, park managers, and policymakers.

### *1.3. Aspects of Dog Parks*

Many scholars have asserted that as built environmental resources, dog parks tend to strengthen a myriad of positive impacts of dog ownership [26–28]. The primary benefits of dog parks can be generalized into physical and social dimensions. Many studies have acknowledged that a nearby dog park can encourage physical activity, through dog walking and play, which consequently contributes to human and canine physical health [22,23,29–31]. Moreover, dog parks provide a space for dogs and their owners to meet and become acquainted with each other, which enhances social interactions for both individuals and their dogs [26,32]. Socializing in dog parks can result in greater positive feelings towards the neighborhood, enhancing the sense of community and social capital [18,22–24,32–34]. Other related benefits of dog parks include reduced aggressiveness of dogs, resulting in better controlled dogs [21], and reduced criminal activity [23]. These benefits should be advocated through effective design strategies for dog parks.

Although dog parks provide benefits for both individuals and their dogs, considerable opposition in the design process should not be overlooked. Some issues caused by domestic dogs are often aggravated in dog parks because of the concentrated gathering of dogs. Some studies indicated negative impacts of dog waste on plants, causing soil erosion, unpleasant odors, and the transmission of diseases [23,35]. Canine aggression including dog fights and bites can be a severe phenomenon in dog parks and may result in injuries and controversies. However, it remains questionable if the environmental and health issues related to humans and their dogs can be addressed in the design of dog parks [36].

The design of the built environment can either facilitate or hinder activities such as dog walking [2]. In order to strengthen related activities within dog parks, an increasing number of design guidelines/strategies have been developed for researchers and practitioners. With the advancement of research, most recent studies indicate design strategies should consider the benefits and problems of dog parks beforehand [21]. Systematic studies have also suggested that the primary goal of dog park design should be to enhance their benefits while reduce their conflicts in place [23].

#### 1.4. Research Objective

Dog parks are constructed to provide opportunities for individuals and their dogs to achieve health benefits while mitigating the conflicts between people, animals, and the environment. Design strategies for dog parks should target strengthening these benefits and while mitigating their problems. Even though emerging research suggests that dog park design strategies should be formulated in terms of their benefits and conflicts, no study has investigated whether the existing design strategies match the increased benefits and conflicts of dog parks, or assess if the design of dog parks can support the provision of health benefits while relieving these conflicts. To address these research gaps, this systematic study first synthesizes and analyzes the existing pros and cons and design/management strategies of dog parks. Based on the analysis, we provide recommendations for future planners, researchers, and decision-makers to optimize the design and research processes for dog parks. To achieve the research objective, the following detailed research questions were explored in this study:

- (a) What are the existing benefits of dog parks?
- (b) What are the conflicts that have happened in the dog parks?
- (c) What are the design strategies for dog parks?
- (d) What are the management strategies for dog parks?
- (e) How is it possible to endorse the benefits and minimizing the conflicts while determining the design and management strategies of dog parks?

## 2. Method

To answer the research questions, a systematic study was conducted following PRISMA (Preferred Reporting Items for Systematic reviews and Meta-Analyses) [37], using the support of Citespace to investigate the knowledge structure of canine-related relevant studies.

### 2.1. Search Criteria and Strategy

Inclusion criteria of this study are English-language, peer-reviewed journal articles and full-text academic dissertations and theses [38], in which dog parks are mentioned or the thematic focus. More specifically, our review focused on articles pertaining to: (1) aspects of domestic dogs and dog-related activities in urban open space, including both the benefits and problems; (2) design and/or management strategies of dog parks/off-leash areas of urban open space. Articles that did not focus on the settings of dog parks or urban off-leash areas were excluded from this review.

First, Citespace was employed to determine the knowledge structure of relevant fields, by exploring the development and importance of the dog park research. Second, the in-depth systematic review was conducted following PRISMA. In order to fully cover the relevant concepts of dog parks, the search key words included: “dog park” OR “off-leash area” OR “dog walking” OR “dog ownership” OR “canine”. An online search with these keywords was conducted in Google Scholar, Scopus, PubMed, and Web of Science. Results from the keyword search were scanned for their titles and abstracts to determine the full-text articles for analyses. Additional literature that aligned with the search criteria, detected from the reference lists of the full-text articles, were also included for subsequent screening.

### 2.2. Data Extraction and Analysis

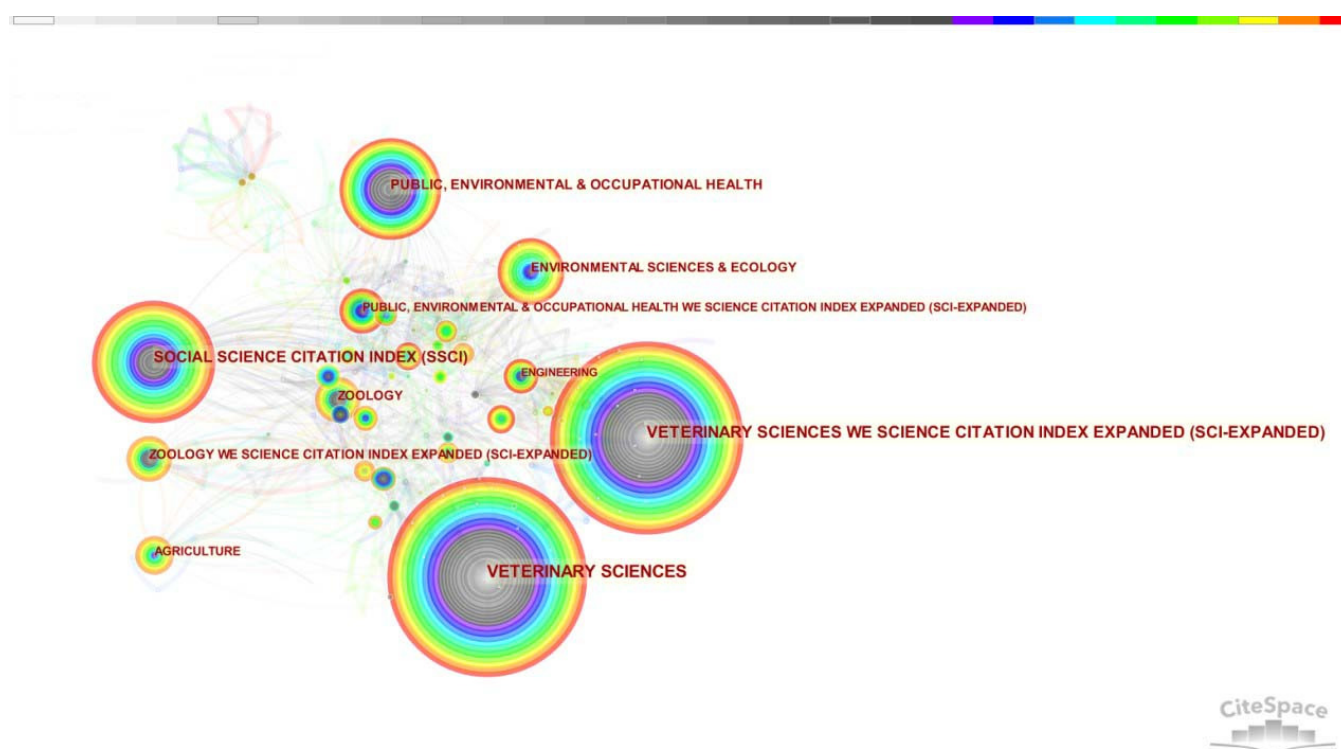
According to PRISMA, relevant content from the selected articles was extracted and analyzed. In addition to the benefits, problems, and design/management strategies of dog parks, we also explored research objectives, methods, and connections between the pros and cons and the design and management strategies. In order to address the core research questions of this study of whether/how the existing design/management strategies of dog parks correspond to the identified benefits and problems, we analyzed the strategies, problems, and benefits of dog parks, as well as the logic underpinning the development of design/management strategies.

### 3. Results

#### 3.1. Citespace Analyses

For the topics of “dog walking” or “dog ownership”, and “benefit”, Citespace conducted with the WOS displayed the time span of retrieval from the year of 1990 to 2022. A total of 1276 journal articles were obtained. The number of studies has grown steadily since 2000, which indicated the topic is worthy of in-depth discussion and research.

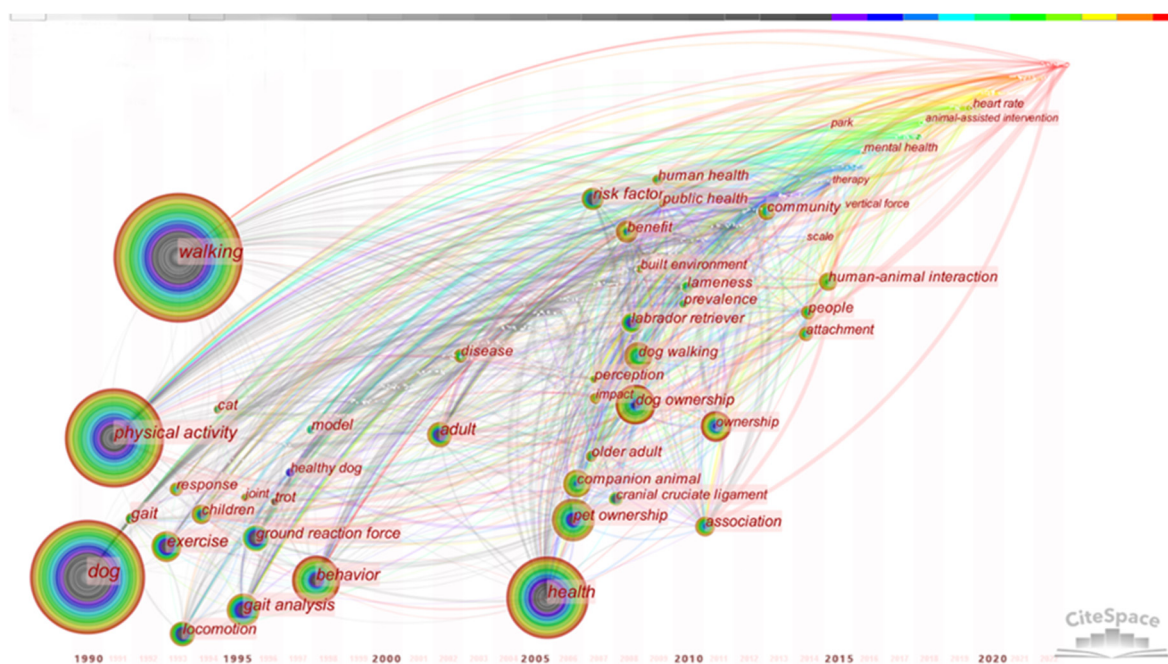
Figure 1 illustrates the knowledge map of the discipline distribution structure of the 1276 articles. As the largest circles are related to veterinary science, the majority of the total searches has been performed in the disciplines of Veterinary Science. With the emergence of circles for other keywords over time, the disciplines of dog ownership and dog walking research have gradually become distributed broadly, from the veterinary disciplines focusing on pet dogs to people-centered social sciences, the environment and ecology, health, and other fields.



**Figure 1.** Disciplinary distribution structure of the research (one-year time slices with older data in “cooler” colors and newer data in “warmer” colors).

The keyword time zone map (Figure 2) shows the distribution of the keywords, their frequencies, and relationships over time from 1990 to 2022, with the time slice set to every year. Prior to the year 2000, based on the keywords of walking, physical activity, and exercise, we can see that research was focused on the physiology, behavior, and movement. After 2000, the associations between people and pet dogs attracted more attention as research objects. Since 2005, the occurrence of similar keywords began to increase, and dog ownership in the search terms was put forward for the first time. Keywords such as health, human health, and public health have gradually become greater areas of focus. Researchers also began to be concerned about whether dog walking and dog ownership brought other effects besides health, such as risk factors, impacts, and perception. In addition, factors affecting dog walking also attracted research attention, including impacts on the environment, as reflected in the keywords of built environment, park, and other place-based keywords.





**Figure 2.** Time zone chart of keywords (each circle in the figure represents a keyword that first appears in the analyzed dataset and is fixed in the first year from the left side. If the keyword appears in a later year, it will be superimposed at the first occurrence).

### 3.2. Systematic Study Following PRISMA

The Citespace analyses uncovered impacts on dog walking and health from the perspective of physical environments. Most recent research into the canine disciplines has started to switch the focus to related environments, such as dog parks.

The subsequent systematic study was conducted following PRISMA. Figure 3 illustrates the flow of the literature identification, screening, and inclusion, which yields a total of 55 articles of interest, of which 46 were peer-reviewed journal articles and 9 were dissertation/thesis [36,39–46]. Most of these articles were conducted in the global west, especially in the USA, Australia, and Europe. There were 16 articles proposing dog park design and/or management strategies without discussion of their pros and cons, and 13 articles focusing on the benefits and/or conflicts of dog parks. Around half of these articles (26 out of 55) explored both the pros and cons and the strategies of dog parks, but only nine of them formulated design and/or management strategies according to the benefits and conflicts. Dog park benefits, conflicts, and design and management strategies for the 55 articles are summarized in Table 1.

As some studies addressed multiple aspects, including benefits, conflicts, or design and management strategies of dog parks (Table 1), we synthesized the information in the following figures (Figures 4–7) according to their frequencies in the identified studies.

**Table 1.** Summary of the studies exploring pros and cons and/or the design/management strategies of dog park.

Articles	Benefits	Conflicts	Design Strategies					Management Strategies
			Access/Location	Lay out	Facility	Amenity	Landscape/Aesthetics	
Shyan et al., 2003 [47]		dog aggregation and fighting						
Forrest & Clair, 2006 [48]								leash law compliance
Allen, 2007 * [36]	promote socialization among dogs benefit physical health of dogs	inter-dog aggression		larger size  separate areas for large and small dogs		garbage cans  accessible equipment for the disabled enough seating	order and variety in design  vegetation planting  shade and shelter	animal control office  penalty policy
Cutt et al., 2008 [49]			park access		dog-specific exercise equipment surface options proper fence	signage garbage cans water system		manage conflict between dogs and people
Lee et al., 2009 [22]	benefit physical health of dogs benefit physical health of people promote people's socialization build sense of community enhance public safety improve quality of life increase properties' value	decrease people's intensity of activity	park access site selection avoiding conflict connect with community trail system  locations regarding safety double- gated entrance accessible entrance for the disabled	separate areas for large and small dogs  larger size	dog-specific exercise equipment  surface options	water system  shade and shelter  enough seating  lighting  parking  signage	vegetation planting	invest in user education  invest in sponsoring events
Hazel et al., 2010 [50]					play equipment for children dog-specific exercise equipment	lighting  garbage cans enough seating	more grass  vegetation planting shade and shelter	self-policing and self-enforcement
Ioja et al., 2011 [19]	benefit physical health of people benefit psychological health of people	feral dogs  hygiene problems						understand preferences of visitor categories adapt parks to the size of flows

Table 1. Cont.

Articles	Benefits	Conflicts	Design Strategies				Management Strategies
			Access/Location	Lay out	Facility	Amenity	
McCormack et al., 2011 [30]		decrease children's intensity of activity	walkable street park access				
Temple et al., 2011 [3]	benefit physical health of people				sidewalk		linear-based design
Brown, 2012 * [39]	promote socialization among dogs benefit physical health of dogs		site selection avoiding conflict park access		dog-specific exercise equipment surface options	double gate entrance water system proper fence enough seating signage parking	vegetation planting shade and shelter
Throop et al., 2012 * [46]			locations regarding safety park proximity double-gated entrance	separate areas for large and small dogs		parking lighting proper fence water system enough seating toilet garbage cans signage	blacklist concern about environmental impacts general maintenance
Matisoff & Noonan, 2012 [34]				clear boundaries of users and resource			self-policing and self-enforcement
Jackson, 2012 [51]						monitors	self-policing and self-enforcement
Urbanik & Morgan, 2013 [24]	build sense of community promote human's behavior to dogs	only good for the users take space away from people					
Toohey et al., 2013 [52]	benefit physical health of people build a sense of community		increase walkability				avoid conflict between dogs and other users

Table 1. Cont.

Articles	Benefits	Conflicts	Design Strategies				Management Strategies
			Access/Location	Lay out	Facility	Amenity	
Gómez, 2013 [29]	promote people's socialization benefit physical health of people enhance public safety promote socialization among dogs benefit physical health of dogs	take space away from people	site selection avoiding conflict				strengthen public engagement
Lamotte, 2013 * [42]		hygienic problem					
Paradeis et al., 2013 [53]		hygienic problems damaged plant communities soil erosion				vegetation planting gardens and agriculture	fertilizer applications technologies monitor soil
Richards et al., 2013 [54]	physical health benefits for people mental health benefits for people physical health benefits for dogs mental health benefits for dogs						
Graham & Glover, 2014 [32]	contribute to social capital for the community benefit dog socialization				durable, low-maintenance seating	monitor  lighting garbage bins	dog training and owner's education events  strengthen public engagement managing dog waste
Gómez et al., 2014 * [41]	promote socialization among dogs benefit physical health of dogs promote people's socialization provide a safe place for dog to play off-leash						

Table 1. Cont.

Articles	Benefits	Conflicts	Design Strategies				Management Strategies
			Access/Location	Lay out	Facility	Amenity	
Gaunet et al., 2014 [18]							dog regulations
Lowe et al., 2014 [55]		dog feces			path morphology	garbage bins	educate dog walkers about dog foul
Instone & Sweeney, 2014 [56]		dog waste					
Toohy & Rock, 2015 [57]	promote socialization among dogs promote people's socialization vibrancy in the neighborhoods benefit physical health of dogs benefit physical health of people	degradation and conflict in parks hygienic problem dogs are out of control incompatible uses neighborhood problems					strengthen public engagement face the conflicts
Leung et al., 2015 [58]						monitors	
McCormack et al., 2016a [59]		decrease children's intensity of activity	park access		dog-specific exercise equipment	garbage cans signage	policies and programming regarding safety
Evenson et al., 2016 [60]	promote people's socialization build a sense of community improve quality of urban environment	limit physical activity		larger size	surface		vegetation planting
McCormack et al., 2016b [61]			increase walkability				aesthetical design vegetation planting
Rock et al., 2016 [62]		hygienic problems dogs are out of control					policy focusing on dog-fouling

Table 1. Cont.

Articles	Benefits	Conflicts	Design Strategies				Management Strategies
			Access/Location	Lay out	Facility	Amenity	
Engelberg et al., 2016 [13]			increase walkability				aesthetical design
Burgess-Cady, 2016 * [40]	promote people's socialization benefit physical health of people promote socialization among dogs benefit physical health of dogs	cause degradation and conflict hygienic problems dogs are out of control					
Booth, 2017 [63]		damage plant communities soil erosion impacts on wildlife incompatible uses					strengthen public engagement
Christian et al., 2017 [64]			strengthen street connectivity park access increase walkability		sidewalks	signage dog waste bags and trash bins safety amenities	natural reserves leashing and access policies enforcement to preserve wildlife policies and programming on dog waste self-policing and self-enforcement less restrictions in public places balance needs of dog owners and non-dog owners
Christian et al., 2018 [65]	promote people's socialization benefit physical health of people enhance public safety promote socialization among dogs benefit physical health of dogs						



Table 1. Cont.

Articles	Benefits	Conflicts	Design Strategies				Management Strategies
			Access/Location	Lay out	Facility	Amenity	
Howse et al., 2018 [66]	promote socialization among dogs benefit physical health of dogs						
Romo, 2018 * [44]		hygienic problems				garbage cans	
White et al., 2018 [20]	benefit physical health of people promote people's socialization						
Gómez et al., 2018 [67]	increase sense of community promote social cohesion increase neighborhood safety promote people's socialization						strengthen public engagement policies and programming on safety issues policies and programming on dog waste
Fletcher et al., 2018 [68]	promote people's socialization	lack of regulations about dogs					
Veitch et al., 2019 [31]	benefit physical health of people	decrease children's intensity of activity					
Kresnye et al., 2019 [69]						signage monitors	
Gómez & Malega, 2020 [33]	benefit physical health of dogs promote socialization among dogs promote people's socialization		park proximity				
Vincent, 2019 [70]	build social capital benefit individuals' health across the life span strengthen community engagement						
Middle, 2020 [26]	promote people's socialization enhance public safety	decrease people's intensity of activity dog parks dominant by some groups	located in under-utilized parkland increase walkability	larger size		monitor	vegetation planting

Table 1. Cont.

Articles	Benefits	Conflicts	Design Strategies					Management Strategies	
			Access/Location	Lay out	Facility	Amenity	Landscape/Aesthetics		
Allen et al., 2020 [71]		hygienic problem					signage		
Koohsari et al., 2020 [1]	promote people's socialization benefit physical health of people		street connectivity			sidewalks dog-specific exercise equipment	enough seating		
Holderness- Roddam, 2020 [21]	enhance public safety	hygienic problem	integrate dog parks into existing parks	separate areas for large and small dogs		surface options	proper fence	suitable grass varieties	time-share in unfenced area with other park users
	promote socialization among dogs benefit physical health of dogs improve quality of urban environment promote people's socialization benefit physical health of people	dogs are out of control	park access connect with community trail system locate at least 150 ft from the residence accessible entrance for the disabled double-gated entrance	larger size		dog-specific exercise equipment	signage enough seating garbage cans water system toilet lighting parking	vegetation planting shade and shelter	policies and programming on safety  minimize environment impacts
Shealy, 2021 * [45]			increase walkability			surface	signage garbage cans	esthetic green space vegetation planting	
Westgarth et al., 2021 [72]	promote socialization among dogs benefit physical health of dogs		locations regarding safety increase walkability				equipment for the disabled parking enough seating garbage cans	avoid repetition scenery	
Włodarczyk, 2021 [73]		hygienic problem noise problem							
LaPointe, 2021 * [43]	attach strong emotion by dog walkers		integrate dog park into existing parks			garbage cans	monitors		minimize environment impact strengthen public engagement

Table 1. Cont.

Articles	Benefits	Conflicts	Design Strategies				Management Strategies
			Access/Location	Lay out	Facility	Amenity	
Ebani et al., 2021 [74]		hygienic problem					periodical examinations
Scruggs et al., 2021 [75]							motivate dog owners to pick up dog fouls balance needs of pet owners and non-dog owners
Arnberger et al., 2022 [76]			site selection avoiding conflict	larger size			strengthen public engagement

\* Academic dissertation/thesis.

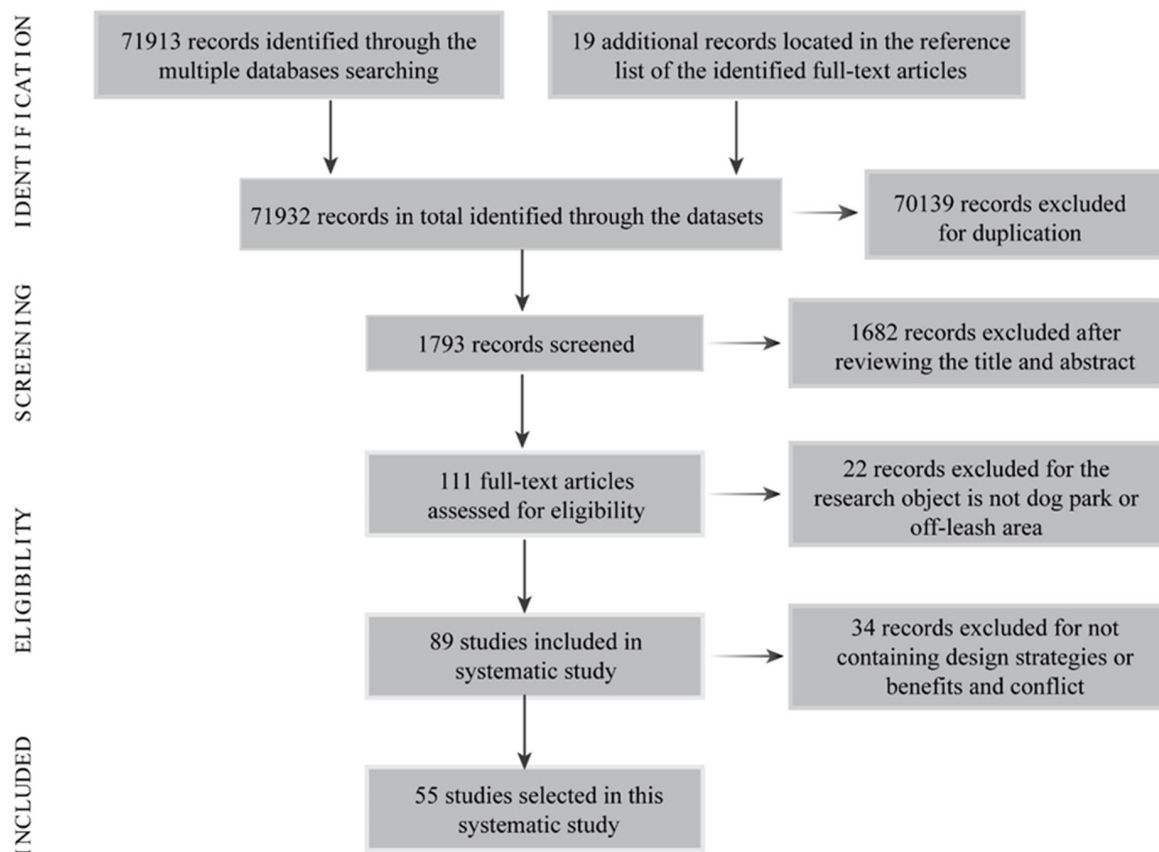
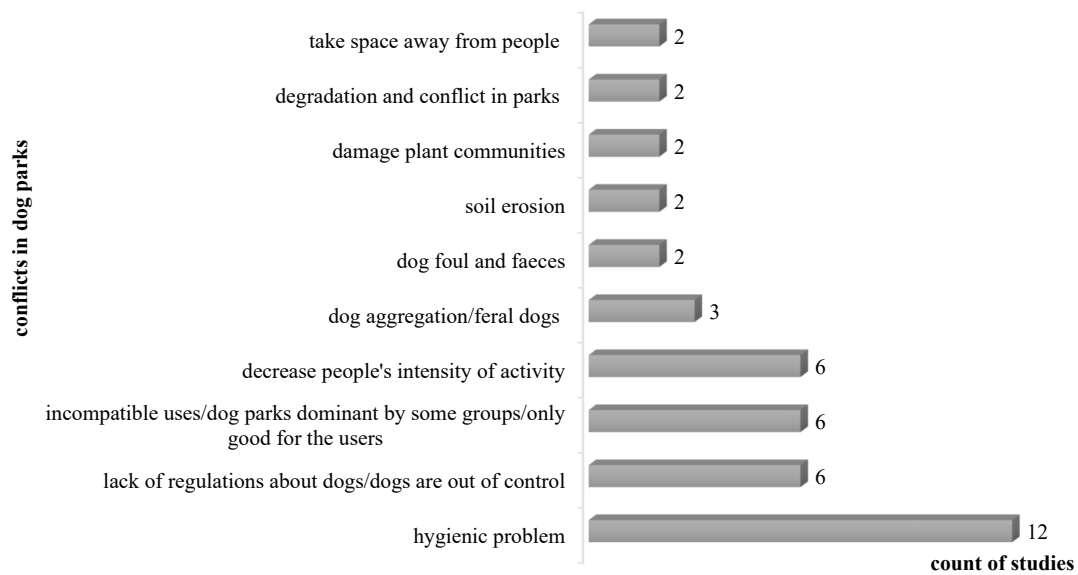


Figure 3. The flow of systematic study following the phases of PRISMA.

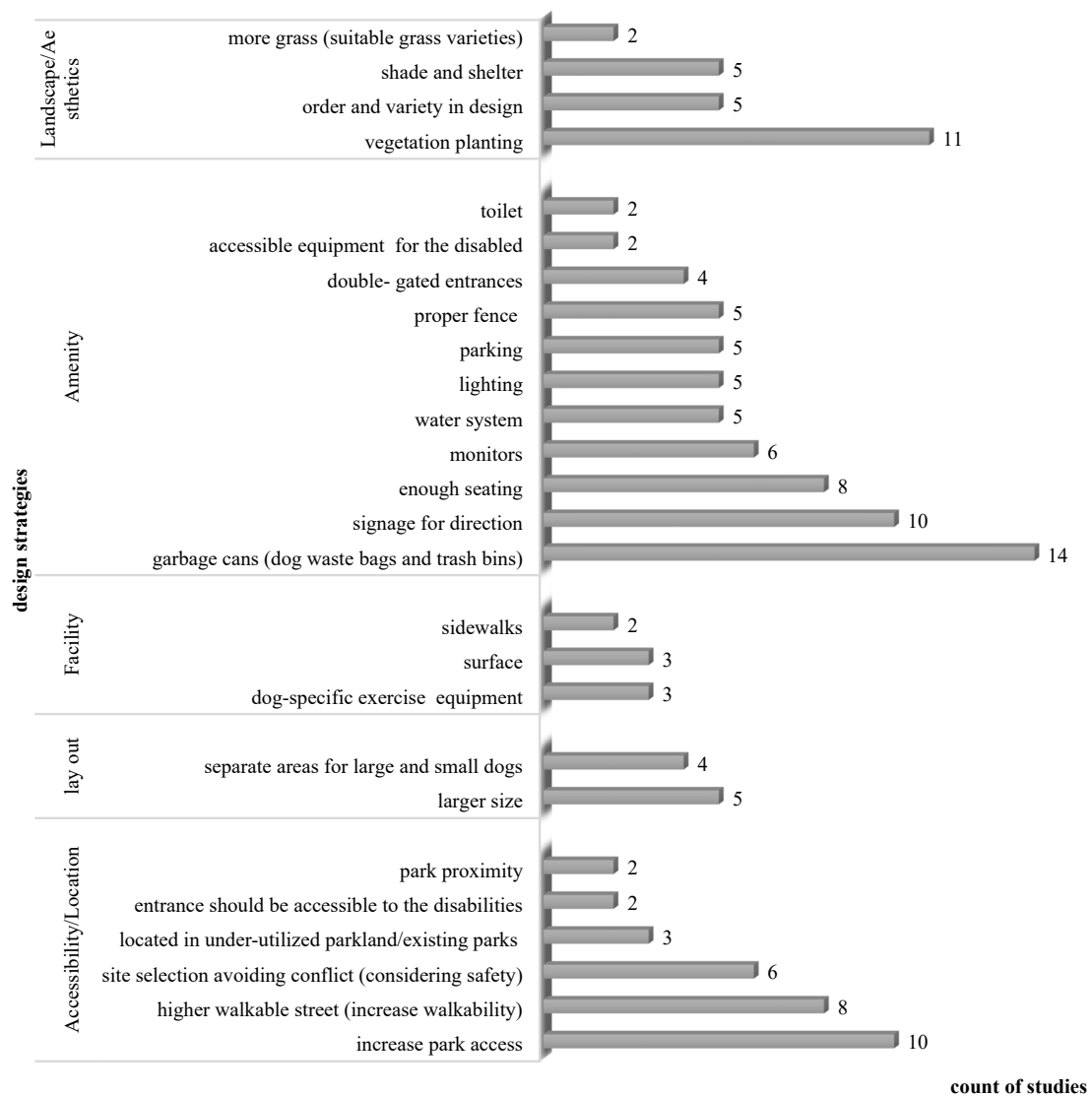


Figure 4. Count of studies identifying the benefits of dog parks.

In Figure 4, the most reported benefits brought by dog parks were identified as improving the physical and social health of dogs and their owners. Some other benefits often mentioned by scholars included building a sense of community and enhancing social cohesion, public safety, and community engagement. Individual scholars indicated that the existence of dog parks in the community can increase property values [22], bring vibrancy to the community [57], and enhance emotional attachment of dog walkers [43]. Additional benefits of dog parks, including mental/psychological health benefits, are related to social benefits, such as promoting human socialization and the enhancement of social cohesion and community engagement.



**Figure 5.** Count of studies identifying the conflicts occurring in dog parks.



**Figure 6.** Count of studies summarizing the design strategies for dog park.



**Figure 7.** Count of strategies in studies summarizing the management strategies for dog parks.

Hygiene problems related to the dog waste is a serious issue in dog parks, as identified by most studies. Figure 5 also showed that incompatible uses between dog owners and non-dog owners, aggressive dogs, and the lack of regulation of dogs received additional attention among large numbers of researchers. While physical health benefits are the most identified dog park benefits for both park visitors and canines, several studies indicated that dog park visitors may have a limited intensity of physical activity. In addition to the negative impacts on the environments indicated by more than one study, such as damage plant community and soil degradation and erosion, Booth [63] was also concerned that the presence of off-leash dogs may influence wildlife in parks.

Design strategies for dog parks include the consideration of their location, size, adjacent park facilities, amenities, and esthetics (Figure 6). Improvements in accessibility and amenities received the most attention among the proposed design strategies, such as increasing park access and the provision of garbage bins for dog waste. Several studies indicated the placement of signage for direction, adequate seating for dog owners, and monitoring programs or equipment for governing off-leash areas. Numerous studies stated that vegetation and plantings also need to be carefully considered in dog parks. Some other design strategies, such as linear-based path design [3], safety amenities, and natural reserves [64], although only discussed by individual studies, were consistent with the common strategies for dealing with identified conflicts, including lack of physical activity and hygienic issues.

In Figure 7, most research has suggested that strengthening public engagement in the decision-making process for dog park construction/management can address the conflicts between canines and humans, as well as between dog owners and non-dog owning park users. A self-enforcement policy that motivates dog-walkers to manage their dog's waste is important in the off-leash areas. Numerous researchers have raised the issue of environmental impacts caused by the canines, and this should be core to the management process of dog parks. Some other management strategies covered the necessity of having animal control officer presence, policies and penalties for noncompliance [36], and even a banned list of chronic offenders [46] in dog parks. To deal with the conflicts in dog parks, the strategies of periodic monitoring of soil conditions [74] and share of time in unfenced areas with other park users [21] were also raised.



#### 4. Discussion

The results from Citespace analyses indicated that growing research focus has been directed on dog ownership, dog walking, and the physical environment since 2016. After the COVID-19 outbreak, growing numbers of researchers have emphasized the physical and mental health benefits brought by dog ownership and dog walking. Additionally, the ways to promote dog-related activities in urban settings have become a significant topic. In this context, dog parks or off-leash areas became important research foci, consistent with the direction of the body of research and illustrating their future research potential.

As the outcomes in the Results section clearly illustrate the identified benefits, conflicts, and design/management strategies of dog parks (research questions a, b, c, d), the research question e: How is it possible to endorse the benefits and avoid the conflicts while determining the design and management strategies of dog parks still remains to be resolved. To explore the research question, we discussed the results of the systematic study from the perspectives of the following two questions.

##### 4.1. Do the Existing Design/Management Strategies Address the Benefits and Conflicts in Dog Parks?

According to the results of the PRISMA, although most of the related studies explored both the pros and cons of dog parks and their design/management strategies, 9 out of 26 studies [26,44,53,55,60,62,71,74] developed strategies in response to the pros and cons of dog parks. Sixty-seven percent of these studies focused on hygiene issues, including dog waste, and solutions in dog parks [44,53,55,62,71,74]. Other studies, while discussing the pros and cons of dog parks and the associated importance of considering the benefits and conflicts for the construction and management of a dog park, did not explicitly discuss design and/or management strategies in terms of the benefits and conflicts brought by dog parks. For example, Lee et al. [22] investigated park user patterns, activities, and their satisfaction and perceptions to provide design guidelines for dog parks. Their findings aligned with the following research that dog parks contributed to the social and physical health of both park users and their dogs, and expanded the knowledge that the park design should be based on the evaluation of aspects of dog parks [22]. However, they overlooked the established connection between aspects of dog parks, especially the identified health benefits and limitations, and the design guidelines of an effective dog park. Both experimental and systematic studies started to propose design and management strategies for effective dog parks for enhancing their benefits while mitigating their risks [23,26,60]. Prior to 2020, a dog park design and management guideline considering both the advantages and disadvantages was generated based on the literature [21]. This design guideline was developed based on existing literature, which did not robustly examine the pros and cons aspects of dog parks. Additionally, the strategies have not clearly indicated which benefits they can bring and/or which issues they can mitigate, so the effectiveness of the design strategies is questionable. Existing research has developed design/management strategies for dog parks that address their benefits and conflicts, but how these strategies can effectively enhance these benefits and avoid the conflicts remains a significant research question to be explored.

##### 4.2. How Can the Design/Management Strategies Endorse the Benefits and Avoid the Conflicts of Dog Parks?

Dog parks can bring users various benefits, but their improper design or management can lead to conflicts between dogs, their owners, other park users, and the physical environment. Based on the findings of the systematic study, we summarized the design and management strategies according to the frequency and relevance of the identified benefits, conflicts, and existing strategies (Tables 2 and 3).

**Table 2.** Targeted benefits and their corresponding design and management strategies for dog parks.

Targeted Benefits	Corresponding Design Strategies	Corresponding Management Strategies
physical health benefits	increase walkability, park access and proximity; larger size of dog park; dog-specific exercise equipment; linear-based design; sidewalk	investing in events
social benefits	shade and shelter; sufficient seating	investing in events
safety enhancement	separate areas for large and small dogs; monitor; lighting; proper fence; double-gated entrances; signage for direction	strengthen public engagement; leash law compliance; self-policing and self-enforcement; policies and programming regarding safety
environment/ quality of life improvement	garbage cans; enhance water system; more grass (suitable grass varieties); order and variety in design	concern about environmental impacts; self-policing and self-enforcement; managing dog waste

**Table 3.** Targeted conflicts and their corresponding design and management strategies for dog parks.

Targeted Conflicts	Corresponding Design Strategies	Corresponding Management Strategies
hygienic problem/dog fouling and feces	garbage cans and dog waste bags; enhance water system; signage; toilet; monitor	concern about environmental impacts; self-policing and self-enforcement; strengthen public engagement; managing dog waste; penalty policy; blacklist
dog aggregation/dogs are out of control	separate areas for large and small dogs; monitor; lighting; proper fence; double-gated entrances;	strengthen public engagement; investing in user education and dog training; self-policing and self-enforcement; animal control office; leash law compliance; blacklist
incompatible uses/dog parks dominant by some groups	site selection avoiding conflict (considering safety); locate at least 150 ft from the residence; clear boundaries for different users; signage; order in park design;	strengthen public engagement; balance needs of dog owners and non-dog owners; leash law compliance; time-share in unfenced area with other park user; self-policing and self-enforcement; blacklist
soil erosion/damaged planting and wildlife	more grass and suitable grass varieties; natural reserves	strengthen public engagement; periodical soil examination; fertilizer applications
Decrease people's intensity of activity	increase walkability, park access and proximity; larger size of dog park; dog-specific exercise equipment; linear-based design; sidewalk	investment in events

The identified articles inferred that a linear-based design could support both people and canine walking activities [3], which was aligned with the experimental evidence [77]. Significant numbers of the selected studies concluded that increased dog park access and proximity can encourage physical activities among dogs and their owners [21,22,30,33,39,46,49,59,64], because residents of local communities tended to walk to nearby dog parks more frequently. McCormack et al. [30] further discussed that a well-maintained dog park with clear signage could improve dog walking that contributes to physical health benefits. Recent statistical analysis indicated durable seating areas and adequate shade and shelter could facilitate social interaction among park users [78]. This reinforces the design strategies for investing in seating and shade trees to enhance social benefits in dog parks [32]. Physical and social health benefits among park visitors and their dogs are the most reported benefits brought by dog parks, but limited management strategies were developed for maximizing these

benefits. It has been demonstrated that having events at parks, such as sports competitions, is correlated with physical activating and gathering of people [79], so we suggested that investing in events can encourage gathering visitors and dogs to engage in and physical and social activities in dog parks. Specific evidence between the research correlations in the dog park setting is anticipated to provide opportunities for future research.

As illustrated in Table 3, a greater number of design and management strategies were plotted to address conflicts and issues occurring in dog parks, when compared to enhancing their benefits. Hygienic issues in dog parks received the most attention from scholars. Dog feces, soil erosion, and damage to vegetation have received notable attention [53]. More concerning, health risks from disease transmission between dogs or from dogs to humans may occur without the proper design and management of gathering areas [80]. Regular monitoring programs and equipment, such as the placement of onsite surveillance cameras, can continuously supervise the condition of dog parks, including damage to vegetation and soil. Some scholars designed monitoring protocols with public engagement and mobile technology to examine hygiene issues and aggressive dogs [58,69]. However, surveillance programs should be carefully considered, as they can create issues of privacy. In addition to the park amenities, such as garbage cans, waste bags, and signage reminding and providing direction for waste disposal, the enhancement of the water system of a dog park is a key strategy. To minimize the transmission of zoonotic diseases, the location of dog parks should avoid proximity to natural water resources such as rivers and lakes [81], and Middle [26] suggested that seasonal drainage basin areas could be locations of choice for dog parks. Most importantly, management strategies corresponding to individuals and dogs can mitigate the spread of bacteria. The education of dog owners about environmental impacts to enhance self-enforcement of park users is the most effective strategy for decreasing the accumulation of dog waste and related hygienic issues in dog parks. This may be more critical than the waste-management amenities and strategies. In extreme cases, penalties and enforcement of a banned list of frequent offenders may also be necessary to mitigate these issues in dog parks.

Conflicts between park visitors with and without dogs for extended periods are especially prevalent in dog-gathering areas. Dogs that suffer from behavioral issues may trigger dog fights and aggregation-based dog conflicts, but also impact incompatibility between dog walkers and other park users. It is important for a well-designed and managed dog park to mitigate these issues. Among the listed strategies in Table 3, to mitigate conflicts, a logical park design with clear boundaries and proper fencing will separate dogs of different sizes and visitors with different intentions. Significant research including the most recent studies, indicates strengthening public engagement in the decision-making process is an effective solution to many controversies [29,32,43,57,63,67,76]. Most existing issues in dog parks ultimately result from conflicts between different dogs, dog owners and non-dog owners, and impacts of ordinary dog park usage on environmental resources, such as the vegetation, soil, and other park uses. To relieve these conflicts, regular communication and cooperation between constituents, the local government, and stakeholders, including those who advocate for and oppose dog parks, are important in the public involvement process. The selection of dog park sites, design process, and daily management can all be enhanced through representation of different constituents. For example, the involvement of dog park activists and other residents in the process of determining a dog park's location can resolve issues by taking into consideration the concerns of hygienic problem, noise and odors caused by the placement of a dog park from the beginning. Researchers can also be a vital part in the decision-making process by providing professional alternatives for relieving conflicts [29,57]. Additionally, an efficient negotiation mechanism will allow various members to mitigate dog park issues during the decision-making process. We concur with Toohey and Rock [62] that many problems created by the existence of dog parks should not be concealed but openly discussed. Various approaches, such as public meetings, anonymous emails, and online polls can work during the processes of the creation and

use of a local dog park [23,82]. Routine evaluation of dog parks is also recommended for strengthening public engagement, enhancing their benefits, and alleviating their conflicts.

Although we provided the design and management strategies and distinguished the vital role researchers play in response to the identified benefits and conflicts of dog parks, some dilemmas in the existing research still need to be addressed, such as the lack of experimental evidence supporting specific aspects of dog parks and the strategies applied.

Growing numbers of studies have quantitatively explored associations between the features of built environment and dog-walking in Australia, Canada, and the USA. However, there is a dearth of experimental evidence about how the features/design of dog parks may influence park-based activities, such as dog walking. Arguments are passionate on both sides and debate has remained subjective and unresolved because experimental evidence of the ecological impacts of dog walking has been lacking. Holderness-Roddam [21] provided guidance for designing, planning, and managing dog parks primarily based on the literature. Some recent studies have begun to place focus on physical benefits and/or social components of dog parks. For example, Middle [26] proposed that increasing the accessibility of dog parks for neighborhood walking could bring a higher proportion of social interactions. Kresnye [69] designed a cooperative system addressing the physical and social experience of canines in dog parks. However, these strategies are primarily created through qualitative analysis, which not only lacks the establishment of reliability of rationale, but also challenges the generalizability of knowledge and quantitative comparison, such as a meta-analysis. Experimental evidence should be provided in future studies for the development of reliable design and management strategies for the progress of dog park development.

Physical health benefits among dogs and their owners going to dog parks are the most reported benefits in the systematic study. However, a national survey disclosed that dog walking was not sufficiently intensive so as to count as moderate to vigorous physical activity (MVPA) [83]. Evenson et al. [60] discovered people visiting a dog park tended to engage in sedentary activities, such as standing and watching dogs play, a finding supported by other two studies [22,84]. Recent studies have concluded that dog park users are less likely to engage in physical activities than other urban park users, which is contradictory to the previous self-reported results and would thus warrant further, more detailed investigation [26]. As for the differences between perceived physical benefits and the limitations on levels of physical activities, it is important for dog park design and management to support visitors who engage in various park-based physical activities. This leads to some suggestion that an effective dog park should increase general walkability and be accessible for potential dog walking residents. Consideration of the walkable surface with the degradation of grass in larger dog parks was proposed by Evenson et al. [60] to increase the levels of physical activity for dog park users. Park proximity and accessibility to a dog park is central to its health benefits, specifically through facilitating dog walking behaviors, which affirms previous findings by McCormack et al. [30] and Lee et al. [22]. Improving physical activity through dog walking is a promising public health strategy to improve health that could feasibly reach those who are sedentary [54]. Improving the routes to and from dog parks, such that owners can safely walk or jog with their dogs to and from the park, ultimately benefit people and canine physical health. Dog companionship provides social support for the owners to join group activities, and dog parks offer a destination for owners to go and join in activities with their dogs. In addition to dog walking, which was challenged as a sufficient MVPA, we advocate for the placement of exercise facilities, including human–canine specific exercise equipment, to facilitate dog owners to engage in intense MVPA with their dogs other than just walking. The organization of frequent activities and competitions can motivate the MVPA between dog owners and the dogs, which also contribute to the community engagement and social cohesion.

While some researchers elicited that the existence of dog parks in a community could improve the quality of life and the environment [21,22,60], and increase the property

value [22], the controversies brought by off-leash areas may detract from the benefits of the dog park for a community. For such reasons, it is often controversial for municipal governments to plan for dog parks. The literature suggests to strengthen the connection to community-based dialogues for dog park planning and management. Graham and Glover [32] stated the social structure of dog park committees should be governed and managed by disadvantaged groups to increase the stewardship and communication with the community. Not only by strengthening the public engagement, especially the researchers' involvement in the municipal governments' decision-making process, but by attaching importance to the endogenous conflicts and public controversies caused by the canines as well, significant opportunities can be achieved to bring about positive changes to the relationships between urban residents and their canines [57].

## 5. Conclusions

Although dog ownership and dog walking bring various physical and social benefits, especially since the pandemic, dog parks, on one hand strengthen the benefits for people and their dogs; on the other hand, they cause contentious community issues because of the allowance and gathering of off-leash dogs in a public space. Hygienic issues and conflicts between dogs, park visitors with and without dogs are the most identified issues occurring in dog parks. Many people value the physical and social benefits of dog parks, but the objectively measured intensity of physical activity among dog park users is often lower than other park users.

Recent studies have started to develop design and management strategies for dog parks that address the benefits and conflicts. Our study advances these findings to specifically maximize the benefits and minimize drawbacks of off-leash areas. A number of corresponding strategies for the benefits and/or issues of dog parks are formulated based on the experimental evidence for urban parks, rather than specifically for a dog park setting. As there is a lack of empirical research exploring the associations between the design/management strategies and the benefits and conflicts of dog parks, there are research opportunities for experimental studies and greater sample sizes to fill the research gaps. Well-designed strategies for both the planning and management processes of dog parks can enhance the experience of dogs and their owners, while avoiding some of the conflicts that arise during visits to dog parks. The inevitable issues should be confronted and discussed through the decision-making process, from the placement and planning of a dog park to the daily management of the off-leash areas. This study contributes to an integrated understanding and the sustainable coexistence of canines, dog owners, and those human park users who do not own dogs in built environments through appropriate design and management strategies.

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