

Proposed Agenda

Joint Board Workshop

November 12, 2014

Introductions

Legal Services

- Introduction of Mr. Robert Blackmore

Vertical Housing

Strategic Plan

Future Meetings

- Regular Board of Directors meeting, November 19, 2014, Canby Fire District @1900

City of Canby Properties Available For Sale, Lease or Redevelopment



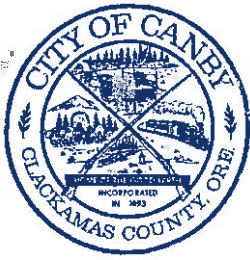
- ❶ Library: 292 N Holly St. 10,975 sf building on 0.26 acre lot
- ❷ Police Station: 122 N Holly St. 6,000 sf building on 0.14 acre lot
- ❸ Transit/Finance: 133 NW 2nd Ave. 1,950 sf building on 0.17 acre lot
- ❹ Development Services: 111 NW 2nd Ave 5,450 sf building on 0.13 acre lot
- ❺ City Hall / Council Chambers 170 NW 1st/182 N Holly on .23 acre lot

 Whole Block Redevelopment Opportunity

For More Information See: www.ci.canby.or.us or Contact:

Renate Mengelberg at mengelberg@ci.canby.or.us, or 503-266-0701





Canby Urban Renewal Agency
Economic Development Department

Canby Fire
OCT 23 2014
District

October 22, 2014

Jim Davis
Division Chief
Canby Fire Dept 062
221 S Pine St
Canby, OR 97013

RE: Canby Vertical Housing Development Zone

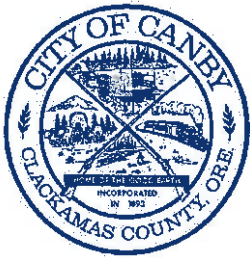
Dear Jim,

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- Help fulfill city goals for improving business development in our downtown, integrating more mixed use residential / office over ground floor retail, encourage higher density residential development and encouraging high quality development through flexibility and incentives to attract developers.
- Increase assessed value through more intensive development and of surrounding properties.
- Increasing the number of residents living downtown that will shop, dine and patronize local businesses.
- Create long-term community wealth through larger, mixed-use buildings that will be fully taxed after the partial VHDZ tax abatement expires.

In order to qualify, a project must have ground floor retail space that would be fully taxable. It also provides a *partial tax exemption on increased property value* for qualified projects for 10 years. Through a VHDZ, a 20 percent tax credit can be applied to each of the first four floors of residential development for a maximum benefit of 80%. The State of Oregon can authorize a Vertical Housing Development Zone. Details about the program are on their webpage:
www.oregon.gov/ohcs/pages/hfs_vertical_housing_program.aspx.

As currently envisioned, a VHDZ in Canby will include properties located in the Downtown Commercial Zone (C-1) – the only area in the city that allows mixed use development. See map attached. The Canby City Council expects to pass a resolution in support of this program at its November 5th meeting and direct staff to submit an application to the State of Oregon later in November.



**Canby Urban Renewal Agency
Economic Development Department**

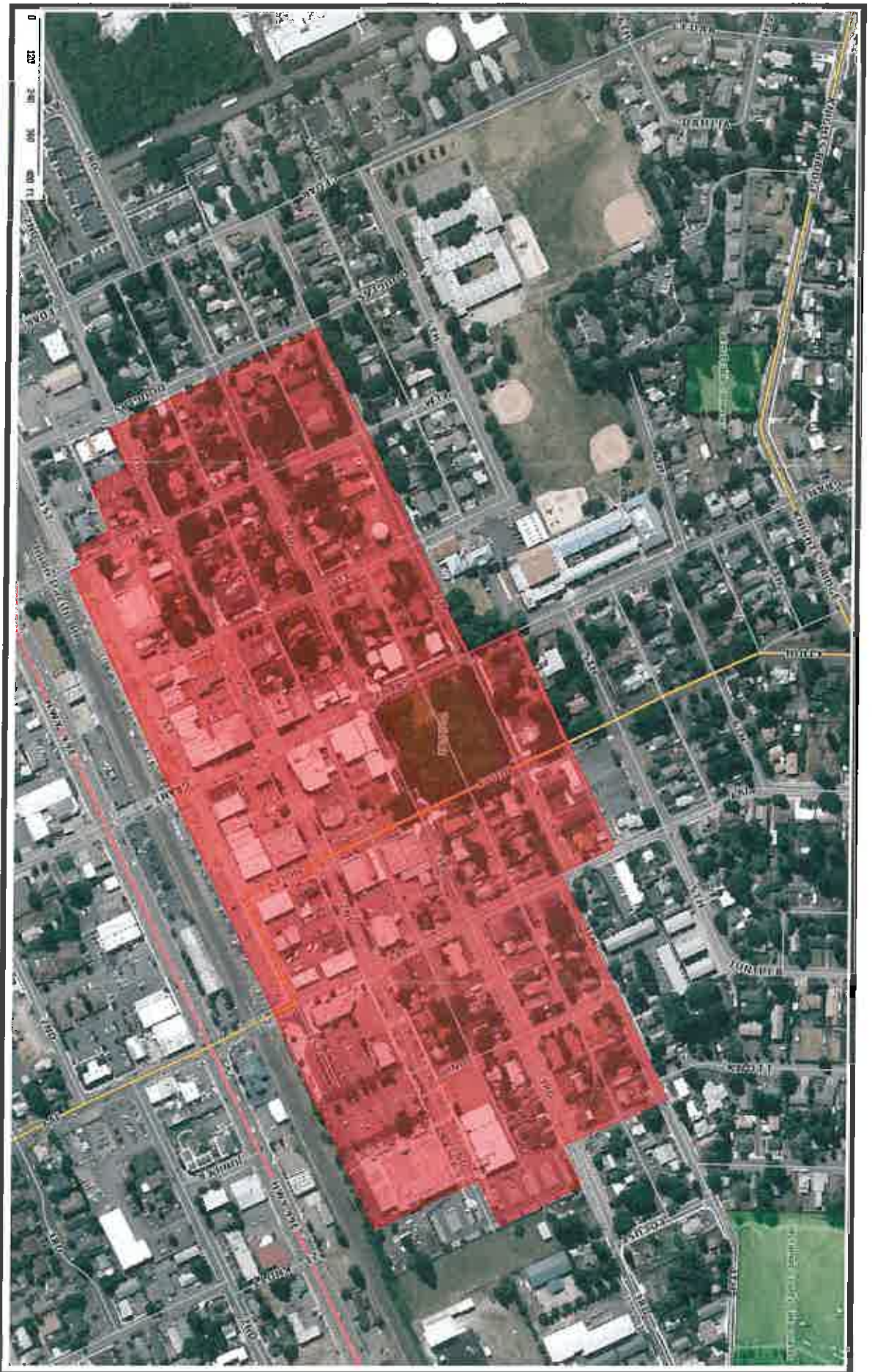
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If you would like to meet with me, ask questions, or share your comments about a Vertical Housing Development Zone in Canby, please contact me at 503.266-0701 or mengelbergr@ci.canby.or.us.

Sincerely,

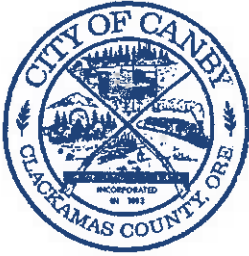
Canby Economic Development Director

Proposed Vertical Housing Zone



City of Canby Oregon Web Maps v. 2.0

Disclaimer: This map was produced using City of Canby and Clackamas County GIS data. The GIS data is maintained by the County to support its governmental activities. This map should not be used for survey or engineering purposes. The City is not responsible for map errors, omissions, misuse or misinterpretation.



City of Canby

October 29, 2014

Canby Urban Renewal Agency
Economic Development Department

Jim Davis
Division Chief
Canby Fire 062
221 S Pine St
Canby, Or 97013

Dear Jim,

On November 19, 2014 the City of Canby City Council plans to adopt the resolution attached authorizing the City to apply for a Vertical Housing Development Zone (VHDZ) designation to the Oregon Housing & Community Services Department. The purpose of a VHDZ is to encourage development of mixed-use multi-unit housing above commercial spaces in urban cores (see rendering for downtown Canby at right).



Encouraging more housing in our downtown has long been a city and community goal. Canby has a shortage of apartments as illustrated in the Overview of Canby Apartment Market 2014 attached. The opportunity to sell and encourage the redevelopment of five city owned properties creates a strategic opportunity to attract more needed retail and housing options to our downtown. The zone proposed would provide an attractive incentive to developers. A VHDZ provides a *partial* tax exemption on increased property value for specific qualified projects. We encourage your support of this program.

Special Districts (as designated in ORS 198.010 or 198.180) do have the opportunity to comment and/or opt out of participation in the VHDZ. If a special district does opt out, it means the exemption possible for a developer will be smaller than it would be if the district did not opt out.

If the your organization is interested in opting out of the VHDZ designation, you must inform the City of Canby in writing of your decision and furnish a copy of a resolution or other appropriate official instrument duly adopted and issued by the governing body of you organization affirming your decision. Please provide any comments by end of business day on December 15, 2014. Submission should be made to: City of Canby, Attn. Renate Mengelberg, Economic Development Director, 111 NW 2nd Avenue, Canby, OR 97013.

If you are considering opting out, we would appreciate a phone call to discuss the matter at 503-266-0701.

111 NW 2nd Avenue – PO Box 930 – Canby, OR 97013 – 503-266-0701 – Fax 503-266-1574
www.ci.canby.or.us

BACKGROUND INFORMATION:

The Vertical Housing Program was adopted into state law in 2001. A Vertical Housing Development Zone (VHDZ) is an area designated by the Oregon Housing & Community Services Department (OHCS) under ORS 307.600 to 307.637. A VHDZ must be entirely within a core area of an urban center, a defined central city, main street or an existing central business district or downtown area. The attached map describes the proposed VHDZ in the City of Canby.

Developing a larger base of mixed-use property is vital to the continued revitalization of this area of Canby. Additional residential development provides support to commercial development, enhances public safety, and ultimately increases taxable value. The VHDZ designation encourages such development by offering partial property tax exemption to qualified projects. This is not a low-income housing program since it applies equally to all levels of housing. It does not sacrifice commercial space in favor of residential use.

Although this program offers tax exemptions to qualified projects, it is designed to ensure that taxing districts will not be negatively impacted. ORS 307.864 (Partial property tax exemption) fully explains the partial tax exemption. Typically, the tax exemption applies only to the **additional value** created by the addition of the first four floors of residential development in a multi-story building. (Projects classified as affordable housing do receive a larger exemption.) For market rate housing projects, tax districts receive taxes on 100% of the “pre-project” value of the property, and taxes on the increased property value of the first story non-residential development.

Districts receive partial taxes on the additional value created by the first four floors of residential development of a qualified project when those floors are built above a non-residential first floor. Multi-story development that adds more floors of residential above the first four floor of residential are fully taxed on those additional floors (for example floors six and seven of a multi-story building would be taxed fully).

After 10 years, the exemption to the project expires and taxing districts receive taxes on the full value of the property. Developers of eligible projects apply directly to OHCS for the tax exemption. If approved, OHCS will provide the County Tax Assessor’s Office with the necessary information for the qualified project.

The City of Canby can, at any time, request termination of the VHDZ from OHCS by Resolution of the City Council. If that occurred, existing exemptions would run their normal course, but no new projects would be able to utilize the exemption. The current statute allows OHCS to certify projects within VHDZ’s only until January 1, 2016.

We are hopeful that a VHDZ in Canby will:

- Help fulfill city goals for improving business development in our downtown, integrating more mixed use residential / office over ground floor retail, encourage higher density residential development and encouraging high quality development through flexibility and incentives to attract developers.
- Increase assessed value through more intensive development and of surrounding properties.
- Increasing the number of residents living downtown that will shop, dine and patronize local businesses.
- Create long-term community wealth through larger, mixed-use buildings that will be fully taxed after the partial VHDZ tax abatement expires.

111 NW 2nd Avenue – PO Box 930 – Canby, OR 97013 – 503-266-0701 – Fax 503-266-1574

www.ci.canby.or.us

RESOLUTION NO. 1202

**A RESOLUTION REQUESTING DESIGNATION OF A
VERTICAL HOUSING DEVELOPMENT ZONE**

WHEREAS, the Canby City Council values include livability, the importance of maintaining a small town feel while continuing to address economic development, and housing; and

WHEREAS, the City Council's Growth and Economic Development Goals encourage the city to 1) Build on strategies to improve business development in downtown and other business areas; and 2) Plan for future housing needs and developments; and

WHEREAS, the City of Canby Community Vision identified integrating mixed use office and/or residential over retail within its Downtown Zone; and listed actions such as encouraging higher density residential development in the downtown core, encouraging high quality development through flexibility and inducements, proactive outreach to developers, and evaluating incentives to attract them; and

WHEREAS, designating Canby's Downtown Commercial (C-1) Zone as a Vertical Housing Development zone ("VHDZ") will encourage mixed use development with ground floor retail and upper story residential units by offering a partial 10 year property tax exemption to qualified projects; and

WHEREAS, encouraging the development of residential mixed uses within the downtown area can bring more vitality, demand for downtown retail and services, and long-term community wealth through larger, mixed use buildings that will be fully taxed after the partial abatement period ends.

NOW THEREFORE IT IS HEREBY RESOLVED, by the City Council of the City of Canby, as follows:

The City of Canby hereby requests that Downtown Commercial Zone of Canby be designated a Vertical Housing Development Zone; and

The Council directs staff to file application for the zone with the State of Oregon.

This Resolution shall take effect November 19, 2014

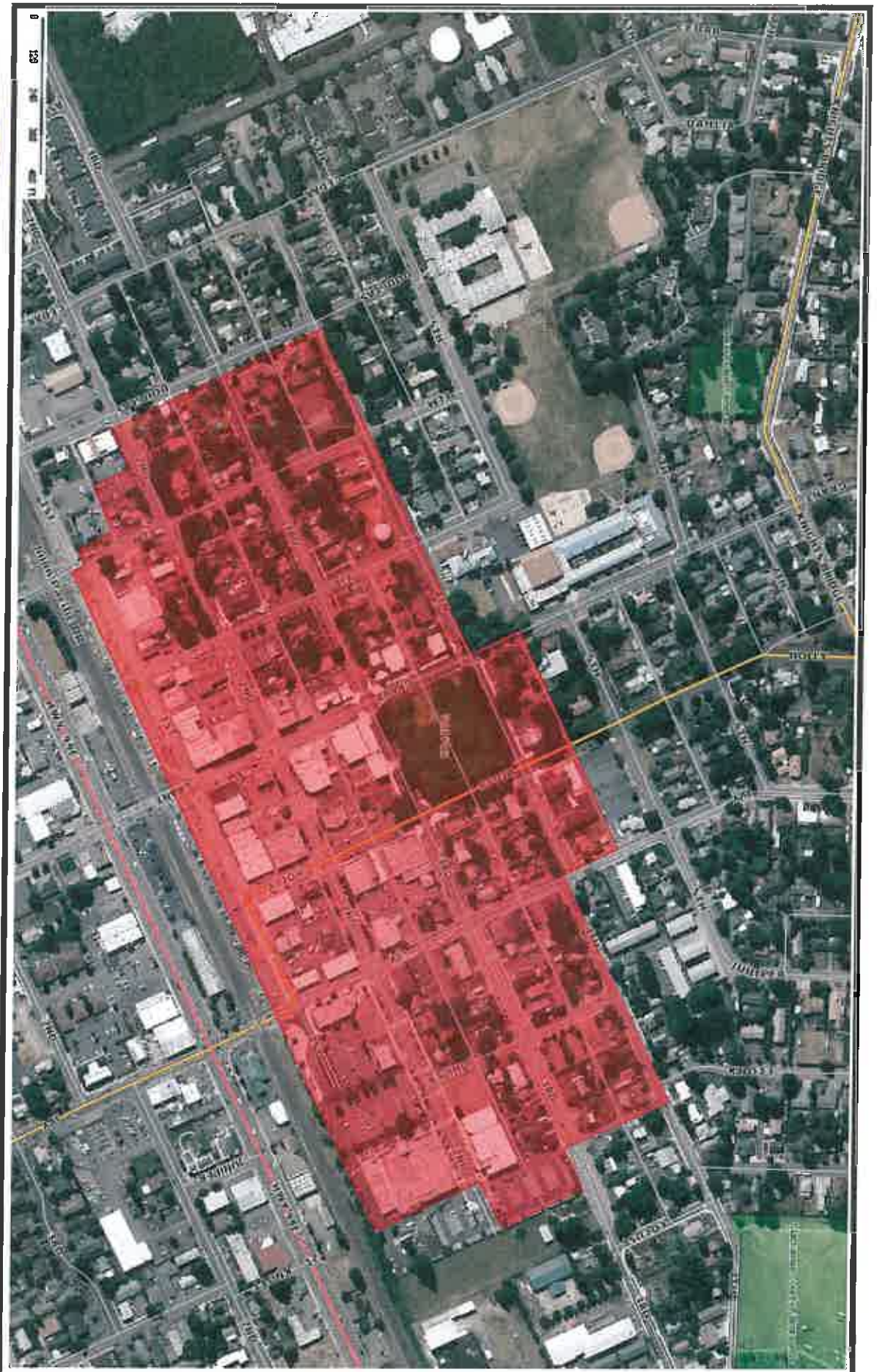
ADOPTED BY THE CANBY CITY COUNCIL at a regular meeting thereof on this 19th Day of November, 2014.

Brian Hodson
Mayor

ATTEST:

Kimberly Scheafer, MMC
City Recorder

Proposed Vertical Housing Zone



City of Canby Oregon Web Maps v. 2.0

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Printed 10/09/2014

If you have any questions about this letter or attachments, please contact Renate Mengelberg, Economic Development Director at 503.266.0701.

Respectfully submitted,



Renate Mengelberg,
Economic Development Director, City of Canby

Cc: Special Districts Association

Attachments:

- Map of proposed Canby Vertical Housing Development Zone
- Draft Resolution for Canby City Council for adoption November 16, 2014
- Overview of Canby Apartment Market 2014

Overview of Canby Apartment Market 2014



FAST FACTS:

Total Number of Apartment Units in Canby	899
Average Age of Apartment Buildings	35 years old
Number of Properties Built After 1990	7
Range in Monthly Rents	
Studio	none
1 Bedroom	\$580-1050
2 Bedroom	\$585-1225
3 Bedroom	\$798-1450














Typical Amenities:

Free parking on property, balcony or patio attached to unit, all have laundry facilities: many coin-operated on-site, many provide washer/dryer hookups in the unit, and a few do provide washer/dryer in the unit.

NOTES:





- The apartment rental market is so tight, and word-of-mouth so prevalent, that property managers do not need to advertise. Oftentimes an upcoming vacancy is claimed before the current tenant has moved out, and waiting lists negate the need to market widely, if at all.
- Every apartment property in Canby experiences very low turnover (1-3 per year) and many have potential tenants on waiting lists for months or years. Typical vacancy rates range from 0-5%.
- Newer apartment buildings (constructed after 1990) have 9% higher average rent rates* over older apartment buildings (constructed 1960s-1980s). *unless property is LIHTC
- Canby has 7 federally-subsidized (LIHTC, Section 8, RD 515, and/or Senior) apartment communities.
- A sample group, consisting of just 5 apartment properties in Oregon City and Wilsonville, contains 200 more units than the total number of apartment units that exist in all of Canby. These properties also have newer apartment buildings, more available units, nicer amenities, and are more visibly marketed through websites, internet searches, and listing publications.

2014 Apartment Overview

	Name of Property	Year Built	Number of Units			Amenities:					
			Total Units	Types of Units	Monthly Rent Range	Parking	Car Port	Balcony-Patio	Washer/Dryer in Unit	Community Center or Gym	Pool
	Stutzman Apartments	1978	13	2 BR	\$585	yes	no	no	hookup	no	no
	Greenbriar Apartments	1974	86	2-3 BR	\$670-875*	yes	no	yes	some	no	yes
	Brentwood Apartments	1976-77	13	2 BR	\$660	yes	no	no	hookup	no	no
	Canby Garden Townhomes	1972	34	2 BR	\$875	yes	yes	patio	hookup	no	no
	Canby Townhouse	1956-68	35	2-3 BR	\$825-895	yes	no	patio	yes	no	no
	Canby West Apartments	1983	24	1-2 BR	\$806-1020, \$555-625*	yes	no	patio	coin-op	yes	no
	Cedar Villa Apartments	1972	16	2-3 BR	\$700-817	yes	no	yes	coin-op	no	no
	Cedars 12 Apartments	1978-79	12	2 BR	\$690	yes	no	patio	coin-op	no	no
	Crawdad Properties	1966	6	2 BR	\$655	yes	yes	patio	hookup	no	no
	David Hafner Properties	1968	12	2-3 BR	\$698-798	yes	yes	patio	hookup	no	no
	Willamette Grove Apartments	2003	86	1-3 BR	\$725-1025	yes	yes	yes	yes	yes	no
	Pine Terrace Apartments	1996	40	2 BR	\$765	yes	no	yes	hookup	no	no
	Sunburst Apartments	1976	5	2 BR	\$750	yes	yes	yes	hookup	no	no

*LIHTC, Section 8, RD 515, or Senior housing

View for Canby, Oregon

	Name of Property	Year Built	Number of Units			Amenities:					
			Total Units	Types of Units	Monthly Rent Range	Parking	Car Port	Balcony-Patio	Washer/Dryer in Unit	Community Center or Gym	Pool
	Sunset Villa Apartments	1977	16	2 BR	\$775-795	yes	no	no	coin-op	no	no
	Timber Terrace Apartments	1967-68	32	2-3 BR	\$725-850*	yes	yes	patio	hookup	no	no
	Kim-Ton Properties	1972	8	2-3 BR	\$795-850	yes	no	patio	free laundry facility	no	no
	Redwood Terrace	1993-95	57	1-2 BR	\$890-995	yes	yes	most do	yes	yes	no
	Northwest Carriage Court		30	1 BR	\$628-669, *or 30% of income	yes	no	some patios	coin-op	yes	no
	Rancho Real Apartments	1968	16	1 BR	\$665*	yes	no	no	coin-op	no	no
	Maple Terrace	1990	28	2 BR	\$800	yes	yes	some patios	coin-op	no	no
	The Orchards Apartments	1994, 1999	76	2-3 BR	\$800-1060	yes	no	yes	yes	no	no
	The Township Apartment Homes		92	1-3 BR	\$900-1450	yes	extra fee	yes	yes	yes	no
	Cascade House	1997-98	50	1-2 BR	\$580-770*	yes	no	yes	coin-op	yes	no
	The Meadows	2004	50	1-2 BR	\$695-795*	yes	no	yes	coin-op	yes	no
	Canby Village: Senior Apartments	1983	52	1-2 BR	\$635-852, *or 30% of income	yes	no	yes	coin-op	yes	no
TOTALS & AVERAGES		Avg. 35 years old	899	1 BR: 214 2BR: 547 3 BR:128	Avg. Rent 1BR: \$750 2BR: \$783 3 BR: \$947	100%	36%	84%	coin-op: 10 hookup: 8 w/d: 6 other: 1	32%	1

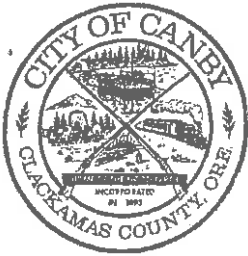
Name of Property	Contact Information		
	Address	Website	Phone
Stutzman Apartments	408-418, 492-502 S Fir St	none	503-341-7287
Greenbriar Apartments	250 S Locust St	http://cascade-management.com	503-266-5638
Brentwood Apartments	410-470 S Knott St	none	503 829-7260
Canby Garden Townhomes	553 N. Pine St	http://www.princetonproperty.com	503-266-3431
Canby Townhouse	164-182 NE 4th Ave	none	503-266-9207
Canby West Apartments	621 N. Douglas St	http://viridianmgt.com	503-266-2003
Cedar Villa Apartments	401-435 N Cedar St	none	503-246-0456
Cedars 12 Apartments	533-555 N Cedar St	none	503-341-9494
Crawdad Properties	560 NE 16th Ave	none	503-655-2885
David Hafner Properties	620-1611 NE 16th Ave	none	503-263-4969
Willamette Grove Apartments	1802 N Pine St	http://www.norris-stevens.com	503-266-3434
Pine Terrace Apartments	800 N Pine St	none	503-263-4969
Sunburst Apartments	323 S Locust St	none	503-655-6412
Sunset Villa Apartments	340-378 Locust St	http://www.princetonproperty.com	503-242-9300
Timber Terrace Apartments	848 N Pine St	none	503-263-4969
Kim-Ton Properties	466 N Ivy St	none	503-266-9207
Makaweli Capital: Redwood Terrace	2040 N Redwood St	http://www.dalton-redwoodterrace.com	503-266-6770
Northwest Carriage Court	728 NW 5th Cir	none	503-266-2332
Rancho Real Apartments	290 SE 2nd Ave	http://www.princetonproperty.com	503-266-3431
Satellite Properties: Maple Terrace	1701 N Maple St	none	503-866-2499
The Orchards Apartments	450 S Pine St	http://www.princetonproperty.com	503-263-3551
The Township Apartment Homes	700 SE 5th Ave	http://www.liveatthetownship.com	855-591-0083
Cascade House at Hope Village	1555 S Ivy St	http://cascade-management.com	503-266-6320
The Meadows at Hope Village	1546 S Fir St	http://cascade-management.com	503-266-6430
Canby Village	488 NW 6th Ave	http://www.canbyvillage.com	503-266-4434

QUOTATIONS:

"A lot of long-term tenants live here. They like the feelings of security and familiarity."
—manager at Pine Terrace

"We are at 100% occupancy and have 60 people on our waiting list It's a 9-12 month wait for a one bedroom apartment and a 2-5 year wait for a two bedroom unit."
—manager at Canby Village

By word of mouth alone, "an apartment is spoken for before the previous tenant has left." She wishes she had more properties in Canby "because it is so easy to get renters." —manager at Crawdad Properties



Canby Urban Renewal Agency
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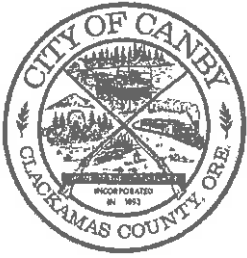
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Canby Economic Development Director

Proposed Vertical Housing Zone



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Scope of Work

Organizational Strategic Plan Facilitation

Phase I: Project Preparation

Task 1-A: Project Initiation & Scheduling

Consultant will develop a project plan and converse with the community's project liaison to gain a comprehensive understanding of the organization's background, goals, and expectations for the strategic plan process. The project plan will be developed identifying:

- Local strategic planning team composition and recruitment
- Strategic planning workshop format
- Schedule
- Location and other logistical issues
- Potential impediments and organizational issues

This meeting will also help to establish working relationships, make logistical arrangements, determine an appropriate line of communications, and finalize contractual arrangements.

Phase II: Customer-Centered Environment Assessment

Task 2-A: Public Meeting and Assessment of Customer Needs and Expectations

Consultant facilitators will assist the department in identifying external customers/key members of the community. Once identified, invitations will be mailed and Consultant will convene these external customers/community leaders for the purpose of addressing the issues outlined above and gaining a realistic view of external customer needs and expectations. The project team will organize these meetings after normal working hours to accommodate citizen work schedules. Consultant has found through experience that 80 to 90 percent of the invitees attend these sessions and actively participate. At a minimum, we recommend the representatives of this citizen's focus group include, but not be limited to:

- Business owners
- Service groups representative(s) (i.e., Chamber of Commerce, Rotary, Lions)
- Prominent citizens in the community
- Members of civic organizations
- Media representative(s)
- Multiple citizens who have been actual recipients of fire and EMS services respectfully
- Representatives of neighborhood organizations and/or homeowners associations
- Representatives of non-profit organizations
- Representatives of local industry
- Other citizen-customers as identified by the strategic planning group

Consultant will facilitate these group meetings with the presence of one organization representative, usually a chief or chief officer, to act only as a technical resource and to answer questions that may arise that the facilitator is unable to answer. In addition to facilitating the session(s), Consultant may utilize surveys and questionnaires to gather necessary information. This step is critical, as it ensures that customer needs and concerns are incorporated into the strategic plan. More and more, the public is demanding the accomplishment of specific objectives and services with fewer resources. This step ensures that the public concerns are recognized by the organization and incorporated into the long-range strategic planning processes and arms influential members of the public with important

Scope of Work
Organizational Strategic Plan Facilitation

background information about their public safety agency that they might not have been exposed to under normal circumstances.

The process will seek to identify:

- How customers prioritize the services provided by the organization
- Areas of customer concern about the organization
- Customer expectations
- Customers positive attributes of the organization
- How “good service” is measured by the customer

Phase III: Planning Workshop

Consultant will facilitate the development of an organizational strategic plan utilizing a local planning team (12 to 20 persons) that includes representatives of the elected body and various levels of the organization itself. The strategic planning process will involve a two-day strategic planning “retreat” to be held on consecutive days at an appropriate location within the community suitable for both full group sessions, as well as breakout small group work sessions..

Task 3-A: Vision, Mission, and Values

Consultant’s experienced facilitators will guide the local planning team in the development of meaningful vision, mission, and values:

- Vision statements describe the way the organization views itself in the future
- Mission statement describes the purpose for which the organization exists
- Values enumerate the principles or ideas that are important to the members

Consultant will facilitate discussions that ensure participation by all present in order to stimulate challenging thought processes, prevent tangential discussion, and move the group to consensus. Consensus identification of key internal standards creates the moral and practical guidelines of the organization.

Task 3-B: Internal and External Assessments

Consultant will guide the local planning group through the honest and objective assessment of internal issues and external challenges, also known as the SWOT Analysis.

- | | |
|-----------------------------------|--|
| <i>Internal Assessment</i> | <ul style="list-style-type: none">• Strengths of the organization• Weaknesses of the organization |
| <i>External Assessment</i> | <ul style="list-style-type: none">• Opportunities facing the organization• Threats challenging the organization |

Analyzing the strengths, weaknesses, opportunities for, and threats to the organization is the next critical step in the strategic planning process. Strengths are important as they represent areas of the organization to be built upon, and weaknesses are areas to be identified as potential sources for improvement. Opportunities are vital to the future of the organization and should be viewed as positive prospects for growth and enhancement, while threats must be identified and addressed in advance, where possible. Other critical issues facing the department may be identified by the strategic planning group at this point as well. These may include issues that the strategic planning group identifies as issues critical to the health and success of the organization.

Scope of Work

Organizational Strategic Plan Facilitation

Task 3-C: Goals and Objectives

Consultant will direct the local planning team in the establishment of goals and objectives, critical tasks, and timelines that are imperative to the organization and the participation of individual members.

- Establishment of organizational goals that address the identified concerns of the external and internal customers over a one to five-year timeframe
- For each goal, the development of one or more measurable objectives that are written in such a manner as to describe the criteria by which an outcome is judged complete or successful
- Development of associated tasks for each goal and objective utilizing the format of identified measurable criteria
- Development of reasonable time for completion

Attainment of this task will be demonstrated by the establishment of realistic goals and objectives for the organization. In order to meet the mission of the organization, the establishment of these goals is essential to providing the organization and the individual members with a clear direction.

The goals and objectives established during this process will become management tools and should be updated on a continuous basis as priorities change and as specific goals and/or objectives are achieved. The goals and objectives can then be used to identify what has been achieved and to denote changes within the community and the organization. Fastidiously following these goals and objectives will provide the department with the necessary direction and guidance into the future. This should also support the department by reducing the number of impediments, disruptions and uncertainties for the organization and its members.

Task 3-D: Performance Measurements

Consultant will direct the local planning team in discussions regarding the establishment of performance measures that assist the organization in measuring their progress toward the organizational vision. This will be an ongoing process, and may initially involve concepts of performance measurement that will require modifications in the collection of necessary data as the organization becomes more focused on measuring achievement and outcomes. The process may include:

- Identification of key performance areas
- Analysis of necessary and available performance data
- Preparation of performance measures from the following categories:
 - Quality Measures
 - Input Measures
 - Output Measures
 - Outcome Measures
 - Efficiency Measures

Phase IV: Published Strategic Plan Document

Task 4-A: Publication of Final Strategic Plan Report

Consultant will compile the results of the strategic planning work sessions and produce five (5) publication-quality bound, final versions of the written Strategic Plan document. An electronic version of the document will also be provided.

