

City of Portland, Oregon
FINANCIAL IMPACT STATEMENT
For Council Action Items

(Deliver original to Financial Planning Division. Retain copy.)

1. Name of Initiator Andrew Aebi		2. Telephone No. 503-823-5648	3. Bureau/Office/Dept. PBOT/PMD
5a. To be filed (hearing date): July 28, 2010 9:30 am TC	5b. Calendar (Check One) Regular <input checked="" type="checkbox"/> Consent <input type="checkbox"/> 4/5ths <input type="checkbox"/>		4. Date Submitted to Commissioner's office and FPD Budget Analyst: July 16, 2010

1) Legislation Title:

Declare intent to initiate local improvement district formation proceedings to construct street and stormwater improvements south of NE Whitaker Way in the NE 136th Ave Phase I Local Improvement District (Resolution; C-10036)

2) Purpose of the Proposed Legislation:

Authorizes initiation of local improvement district formation proceedings and schedules an LID Formation Hearing on or after August 25, 2010.

Revenue and/or Expense:

Is ALL the Revenue and/or Expense a part of the current year's budget? Yes _____ No X

SAP COST OBJECT No(s): T00240 then go to Step #5.

If NO, complete Steps 3 & 4. For modifications to budgets, identify/discuss only the changes to the budget.

3) Revenue:

Will this legislation generate or reduce current or future revenue coming to the City? If so, by how much? If new revenue is generated please identify the source.

This legislation will increase revenue in the estimated amount of \$1,560,714.48 if the Substitute is adopted, or \$865,110.60 if the Substitute to shorten the southern project limit is adopted by Council.

4) Expense:

What are the costs to the City as a result of this legislation? What is the source of funding for the expense? (Please include costs in the current fiscal year as well as costs in future years) (If the action is related to a grant or contract please include the local contribution or match required) ("If there is a project estimate, please identify the level of confidence.")

This legislation will increase direct costs in the estimated amount of \$1,560,714.48 without the Substitute, or \$866,085.13 with the Substitute. The level of confidence is "Low" because survey and engineering are not complete.

Staffing Requirements:

5) Will any positions be created, eliminated or re-classified in the current year as a result of this legislation? (If new positions are created please include whether they will be part-time, full-time, limited term or permanent positions. If the position is limited term please indicate the end of the term.) NO

6) Will positions be created or eliminated in future years as a result of this legislation? NO

Complete the following section if you are accepting and appropriating a grant via ordinance. This section should only be completed if you are adjusting total appropriations, which currently only applies to grant ordinances.

Not applicable.

7) Change in Appropriations (If the accompanying ordinance amends the budget, please reflect the dollar amount to be appropriated by this legislation. If the appropriation includes an interagency agreement with another bureau, please include the partner bureau budget adjustments in the table as well. Include the appropriate cost elements that are to be loaded by the Grants Office and/or Financial Planning. Use additional space if needed.) Upon approval, any necessary budget adjustments will be made in the City's Budget Monitoring Process.

Fund	Fund Center	Commitment Item	Functional Area	Funded Program	Grant	Sponsored Program	Amount

KK 07-13-10

Susan D. Keil

APPROPRIATION UNIT HEAD

SUSAN D. KEIL, Director, Bureau of Transportation

Petition for NE 136th Avenue Local Improvement District

NOTICE TO PETITION SIGNERS:

If owner of a property is a corporation, the petition must be signed in the name of the Corporation by its president, secretary or manager. If the name of the owner is signed by an agent or person holding power of attorney, the agent or Attorney-in-Fact must have authority to sign.

RECEIVED
MAY 10 2010

TO THE CITY COUNCIL:

1. This petition is to create the NE 136th Avenue Local Improvement District.
2. This local improvement district will improve NE 136th Avenue from 80 feet south of Whitaker Way to Prescott Court plus any transition work on abutting street segments, intersections, and/or adjacent property determined to be necessary by the City Engineer. Transition work is anticipated on NE 136th Avenue from Whitaker Way to 80 feet south as well as on NE Prescott Court from the west right-of-way line of NE 136th Avenue to the west property line of 4417 NE 136th Avenue.
3. The general character and scope of the improvement is to remove the existing dirt, gravel and/or hard surface; grade the street to its proper subgrade; construct an asphaltic concrete street with an aggregate base; construct stormwater drainage facilities consisting of curb extensions with water quality treatment facilities; construct sidewalks on both sides of the street; and plant street trees in most locations.
4. Properties will be assessed on an abutting square footage basis. The Bureau of Transportation will absorb overhead costs estimated at \$246,244.64 subject to Office of Management and Finance and City Council approval.

TRANSPORTATION

The undersigned, being the owner or contract purchaser of the described property set opposite my or its name, hereby petition the City Council to improve the street identified in Section #2 above in conformity with the charter, ordinances and regulations of the City of Portland.

Petition Prepared By:

Andrew Aebi, Local Improvement District Administrator
Portland Bureau of Transportation
1120 SW Fifth Avenue, Suite 800
Portland, OR 97204
Telephone: (503) 823-5648
E-Mail: andrew.aebi@portlandoregon.gov

Signature of Property Owner(s) or Contract Purchaser(s):

Please sign here... ->

...and date -

Yohi Kurosaki, President / Summit Properties, Inc.
5/4/2010

Please sign here... ->

...and date -

Deed Holder or Contract Purchaser:

State I.D. #:

Tax Acct. #:

Site Address/Property Location: Estimate:

SUMMIT PROPERTIES INC

Total S.F.:	59,924	Assessable S.F.:	48,000	1N2E23AC 3300	R783401390	13650 NE WHITAKER WAY	\$346,477.36
Total S.F.:	59,924	Assessable S.F.:	48,000	Total Estimate:			\$346,477.36

EXHIBIT A

Petition for NE 136th Avenue Local Improvement District

NOTICE TO PETITION SIGNERS:

If owner of a property is a corporation, this petition must be signed in the name of the Corporation by its president, secretary or manager. If the name of the owner is signed by an agent or person holding power of attorney, the agent or Attorney-in-Fact must have authority to sign.

TO THE CITY COUNCIL:

1. This petition is to create the NE 136th Avenue Local Improvement District.
2. This local improvement district will improve NE 136th Avenue from 60 feet south of Whitaker Way to Prescott Court plus any transition work on abutting street segments, intersections, and/or adjacent property determined to be necessary by the City Engineer. Transition work is anticipated on NE 136th Avenue from Whitaker Way to 60 feet south as well as on NE Prescott Court from the west right-of-way line of NE 136th Avenue to the west property line of 4417 NE 136th Avenue.
3. The general character and scope of the improvement is to remove the existing dirt, gravel and/or hard surface; grade the street to its proper subgrade; construct an asphaltic concrete street with an aggregate base; construct stormwater drainage facilities consisting of curb extensions with water quality treatment facilities; construct sidewalks on both sides of the street; and plant street trees in most locations.
4. Properties will be assessed on an abutting square footage basis. The Bureau of Transportation will absorb overhead costs estimated at \$246,244.64 subject to Office of Management and Finance and City Council approval.

The undersigned, being the owner or contract purchaser of the described property set opposite my or its name, hereby petition the City Council to improve the street identified in Section #2 above in conformity with the charter, ordinances and regulations of the City of Portland.

Petition Prepared By:

Andrew Aebi, Local Improvement District Administrator
Portland Bureau of Transportation
1120 SW Fifth Avenue, Suite 800
Portland, OR 97204
Telephone: (503) 823-5646
E-Mail: andrew.aebi@portlandoregon.gov

Signature of Property Owner(s) or Contract Purchaser(s):

Please sign here... ->

...and date -

Please sign here... ->

...and date -

Alma Heredia
5-27-2010
Alma Tools, Inc.

Deed Holder or Contract Purchaser:

State I.D. #:

Tax Acct. #:

Site Address/Property Location: Estimate:

ALMAR TOOL & CUTTER GRINDERS C

Total S.F.:	11,985	Assessable S.F.:	11,985	1N2E23AC 2200	R700700630	4715 NE 136TH AVE	\$86,511.06
Total S.F.:	11,985	Assessable S.F.:	11,985	Total Estimate:			\$86,511.06

NE 136TH AVENUE LOCAL IMPROVEMENT DISTRICT
Apportionment Worksheet
Prepared by the Local Improvement District Administrator on 7/19/10

STATE ID	RNO	PROPERTYID	OWNER	Actual S.F.	Assessable S.F.	% LID Estimate	Cost Estimate	Valuation	Delinquent Liens/Taxes	Ratio	Notes
Waivered Properties											
1N2E23AC 2200	R700700630	R253970	ALMAR TOOL & CUTTER GRINDERS C	11,985	11,985	5.5%	\$86,511.06	\$499,620	\$0	5.8	W
1N2E23DB 400	R700700470	R253964	GRUBBE,BARBARA	13,334	13,334	6.2%	\$96,248.52	\$222,410	\$0	2.3	A, W
1N2E23DB 300	R700700450	R253963	NE PRESCOTT COURT LLC %STEVEN B SULLIVAN MGR	12,492	12,492	5.8%	\$90,170.73	\$669,200	\$14,978	7.4	A, W
1N2E23AC 2500	R700700490	R253965	OVERBY,WAYNE A	11,799	11,799	5.5%	\$85,168.47	\$215,760	\$0	2.5	W
1N2E23AC 1900	R700700550	R253969	PUBLIC STORAGE PROPERTIES VII % DEPT PT OR 20701	142,277	48,000	22.2%	\$346,477.36	\$4,407,440	\$0	12.7	W
1N2E23AC 3300	R783401390	R274049	SUMMIT PROPERTIES INC	59,924	48,000	22.2%	\$346,477.36	\$1,395,040	\$0	4.0	W
Nonwaivered Properties											
1N2E23AC 2600	R700700410	R253961	HESS,OSKAR TR	12,188	12,188	5.6%	\$87,976.38	\$93,520	\$0	1.1	
1N2E23AC 2700	R700700390	R253960	HESS,OSKAR TR (OSKAR HESS LIVING TRUST)	10,398	10,398	4.8%	\$75,055.66	\$79,070	\$0	1.1	
1N2E23AC 2800	R700700370	R253959	HESS,OSKAR TR (OSKAR HESS LIVING TRUST)	11,997	11,997	5.5%	\$86,597.68	\$91,310	\$0	1.1	
1N2E23AC 2300	R700700530	R253968	N W INVESTMENTS GROUP LLC	12,011	12,011	5.6%	\$86,698.74	\$213,310	\$0	2.5	
1N2E23AC 2400	R700700510	R253966	RICKEY,BRUCE R	12,013	12,013	5.6%	\$86,713.18	\$217,540	\$0	2.5	
1N2E23AC 3700	R700700130	R253954	SUPREME STEEL INC	23,504	12,000	5.5%	\$86,619.34	\$157,630	\$0	1.8	
TOTAL:				333,922	216,217	100.0%	\$1,560,714.48	\$8,261,850	\$14,978	5.3	
6			Waivered Properties	251,811	145,610	67.3%	\$1,051,053.50	\$7,409,470	\$14,978	7.0	
6			Nonwaivered Properties	82,111	70,607	32.7%	\$509,660.98	\$852,380	\$0	1.7	
12			Total	333,922	216,217	100.0%	\$1,560,714.48	\$8,261,850	\$14,978	5.3	
Notes: W - Property is waived											



NE 136th Avenue Phase I LID Map

Subject Area

- Local Improvement District Boundary
- Area of Improvement
- Taxlots in LID
- Petition support received
- No Petition support received
- Waivered Properties
- Property exempt from Phase I
- Possible ROW acquisition limit

Existing Conditions

- Building Footprints
- 2 ft Contours
- Existing Curbs
- Existing Edge of Pavement
- Existing Sidewalks
- Street Lights
- TriMet Bus Stops
- TriMet Bus Lines

NE 135TH AVE

NE 136TH AVE

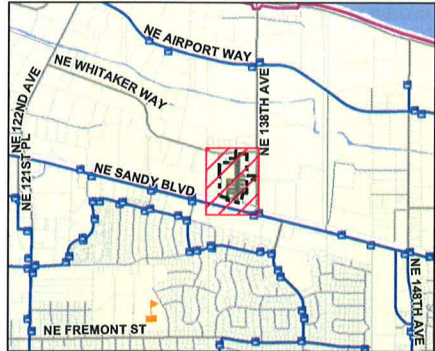
NE WHITAKER WAY

NE 138TH AVE

NE PRESCOTT CT

NE SANDY BLVD

Overview Map



- Subject Area
- Map Extent
- TriMet Bus Stops
- TriMet Bus Lines

RESOLUTION No.

Declare intent to initiate local improvement district formation proceedings to construct street and stormwater improvements south of NE Whitaker Way in the NE 136th Ave Local Improvement District (Resolution; C-10036)

WHEREAS, valid petitions from owners of properties within the proposed NE 136th Avenue Local Improvement District were filed with the Local Improvement District Administrator as contained in Exhibit A (attached to the original only); and

WHEREAS, the Local Improvement District Administrator has reviewed the petitions attached in Exhibit A and determined all of them to be valid; and

WHEREAS, as set forth in Section 17.08.010 of City Code the Bureau of Transportation is the Responsible Bureau for the proposed improvement, and the Bureau recommends initiation of local improvement district formation proceedings; and

WHEREAS, the petitions contain signatures of owners of property representing a majority of the properties which will be specially benefited by the proposed improvement as evaluated in Exhibit B; and

WHEREAS, the project is located in the Argay neighborhood, whose neighborhood association was notified of this project on June 15, 2010;

NOW, THEREFORE, BE IT RESOLVED, that the general character and scope of the improvement is to remove the existing dirt, gravel and/or hard surface; grade streets to their proper subgrade; construct asphaltic concrete streets with an aggregate base; construct stormwater drainage facilities consisting of curb extensions with water quality treatment facilities; construct sidewalks on both sides of the street; and plant street trees in most locations; and

BE IT FURTHER RESOLVED, that the Council declares the intent of the City of Portland to initiate local improvement district formation proceedings to construct street and stormwater improvements on NE 136th Avenue from 80 feet south of the south right-of-way line of NE Whitaker Way to the north right-of-way line of NE Prescott Court, plus any transition work on abutting street segments, intersections, and/or adjacent property determined to be necessary the City Engineer; transition work is anticipated on NE 136th Avenue from the south right-of-way line of Whitaker Way to 80 feet south as well as on NE Prescott Court from the west right-of-way line of NE 136th Avenue to the west property line of 4417 NE 136th Avenue; and

BE IT FURTHER RESOLVED, that the local improvement district shall be known as the NE 136th Avenue Local Improvement District and for purposes of the Local Improvement District Formation Hearing as set forth in Section 17.08.070 of City Code, the boundary shall be as shown in the map in Exhibit C; and

BE IT FURTHER RESOLVED, the preliminary estimate of the cost of the improvements is \$1,725,011.95 and the Local Improvement District Administrator's level of confidence in the cost estimate for this project as of the filing date of this resolution is "Low" per Exhibit A of Resolution No. 36430 adopted by Council on July 26, 2006, given that project specifications are preliminary; and

BE IT FURTHER RESOLVED, that the assessment methodology of the NE 136th Avenue Local Improvement District shall be on an abutting linear footage basis, unless this assessment methodology is modified by Council at the Local Improvement District Formation Hearing; and

BE IT FURTHER RESOLVED, that property owners will provide funding estimated at \$1,560,714.48 plus the costs of extra work, and the Portland Bureau of Transportation will fund overhead costs in the estimated amount of \$164,297.47; and

BE IT FURTHER RESOLVED, that the Council intends to construct the project; and

BE IT FURTHER RESOLVED, that the Council directs the Local Improvement District Administrator to initiate local improvement district formation proceedings as set forth in Section 17.08.070 of City Code and to schedule a Local Improvement District Formation Hearing on August 25, 2010 at 9:30 AM or on the earliest practicable date thereafter.

Adopted by the Council,

Mayor Sam Adams

Prepared by: Andrew Aebi:slg

Date Prepared: July 21, 2010

LaVonne Griffin-Valade

AUDITOR OF THE CITY OF PORTLAND

By

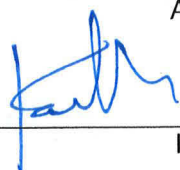
Deputy

1082

Agenda No.
RESOLUTION NO.
Title

✓140
See Substitute
Res 36803

Declare intent to initiate local improvement district formation proceedings to construct street and stormwater improvements south of Whitaker Way in the NE 136th Ave Local Improvement District (Resolution; C-10036)

INTRODUCED BY Commissioner/Auditor: MAYOR SAM ADAMS COMMISSIONER APPROVAL Mayor—Finance and Administration - Adams Position 1/Utilities - Fritz Position 2/Works - Fish Position 3/Affairs - Saltzman Position 4/Safety - Leonard BUREAU APPROVAL Bureau: Bureau of Transportation Group Manager: Greg Jones Development & Capital Program Other AHA 7/21/10 Prepared by: Andrew Aebi:slg Date Prepared: July 19, 2010 Financial Impact Statement Completed <input checked="" type="checkbox"/> Amends Budget <input type="checkbox"/> Not Required <input type="checkbox"/> Portland Policy Document If "Yes" requires City Policy paragraph stated in document. Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Council Meeting Date JULY 28, 2010 City Attorney Approval	CLERK USE: DATE FILED JUL 23 2010 <i>on behalf of Mayor Adams</i> LaVonne Griffin-Valade Auditor of the City of Portland By:  Deputy ACTION TAKEN:
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AGENDA TIME CERTAIN <input checked="" type="checkbox"/> Start time: 9:30 AM Total amount of time needed: 15 min (for presentation, testimony and discussion) CONSENT <input type="checkbox"/> REGULAR <input type="checkbox"/> Total amount of time needed: _____ (for presentation, testimony and discussion)

FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS:		
		YEAS	NAYS
1. Fritz	1. Fritz		
2. Fish	2. Fish		
3. Saltzman	3. Saltzman		
4. Leonard	4. Leonard		
Adams	Adams		