SUNRISE WATER AUTHORITY

10602 SE 129th Avenue • Happy Valley, OR 97068
Voice: (503) 761-0220 • Fax (503) 761-7406

ANNEXATION INSTRUCTIONS

The documentation required to submit an application to Clackamas County for annexation of territory to Sunrise Water Authority is provided in this application packet. To submit the application to the County, the completed forms, maps, certifications, resolution, and appropriate fees need to be delivered to the Clackamas County Elections Department office at 1710 Red Soils Court, Suite 100, Oregon City, OR 97045.

The Content of the application packet will need to include:

A Boundary Change Data Sheet.
A scaled map identifying the property to be annexed, preferably 1/4 section maps available through the county.
A metes and bounds description of the property to be annexed, along with copies of any deeds referenced in the legal description.
A petition containing signatures of the property owners of the property to be annexed.
A Notice list containing the information described on the Notice list form.
A resolution endorsing annexation adopted by Sunrise Water Authority.
If the property lies within a city boundary, a resolution endorsing annexation adopted by the city council.

The applicant must complete the Boundary Change Data Sheet and sign the petitions. A cartographer or surveyor is usually engaged to complete the metes and bounds description and scaled map. Once the petition is completed the certification of property ownership will need to be completed by the assessor's office.

The application will also need to include a resolution of the Board of Commissioners of the Sunrise Water Authority endorsing the annexation. If the property lies within a city jurisdiction, a resolution of the City Council endorsing the annexation will also need to be included.

Once you have assembled the content of the packet, send a copy of the forms to: TechnicalServices@sunrisewater.com and if the proposed annexation meets internal standards, we will complete a resolution for submittal to the Board on the next available meeting date or inform you of any deficiencies or issues with the application. The Sunrise Water Authority Board of Commissioners typically meets on the fourth Wednesday of each month.

Once the entire application is assembled with all appropriate certifications and the resolution, it will need to be submitted to the Clackamas County Elections Department at 1710 Red Soils Court, Suite 100 in Oregon City at the Clackamas County's Red Soils Campus. Ken Martin, of

Ken Martin Consulting, has been retained by Clackamas County to process annexation applications. Any questions regarding the application packet can be directed to him at 503-222-0955.

Two checks will need to be included with the application: one payable to Clackamas County for the annexation processing fee and one payable to Metro for the mapping fee.

Fees for annexation are based upon the acreage included on the application as follows:

Clackamas County Annexation Fees:

1 Acre or less	$225
More than 1 Acre but less than 2 Acres	$395
At least 2 Acres but less than 5 Acres	$605
At least 5 Acres but less than 10 Acres	$895
At least 10 Acres but less than 20 Acres	$1160
At least 20 Acres but less than 40 Acres	$1535
40 Acres or more	$1835

Metro Mapping & Filing Fee:

Single Tax lot less than 1 Acre	$150
1-5 Acres	$250
5-40 Acres	$300
40+ Acres	$400

If you have questions regarding this process, please do not hesitate to contact us at 503-761-0220.

Annexations to **DISTRICT – 100% Owners Method**

I. Application Process for Property Owners

PLEASE READ ALL INSTRUCTIONS BEFORE FILING A PETITION WITH THE COUNTY

Step 1. Petition

Attached is a *Petition* form for your use. Please fill in the blanks on the first page, sign and fill in the requested information on the second page and insert or attach the legal description to the first two pages.

Who May Sign: A property owner shown on the last assessment roll or where title has transferred the property owner entitled to be shown on the next assessment roll; a contract purchaser whose rights of ownership are exclusive over the seller's; a person who is authorized to sign legal documents for a corporation; a guardian, executor, etc. who has been appointed by the Court. The last two types of signers must have a certified copy of their authority to sign.

After completing the petition, have the County Assessor's Office certify the property owner signatures using the attached *Certification of Property Ownership* form. While you are at the Assessor's Office show them your legal description and buy two copies of the 1/4 Section Maps of the area showing the property to be annexed.

Step 2. Legal Description

The legal description noted above must be a metes and bounds legal description of the territory to be annexed. This description should be inserted in or attached to the Petition. In addition, one separate copy of the metes and bounds description should be submitted. (A lot, block and subdivision description may be substituted for the metes and bounds description if the area is platted and no metes and bounds description is available.) **If the legal description contains any deed or book and page references, legible copies of these must be submitted with the legal description**.

Step 3. Map

As noted above you must submit two copies of the 1/4 Section map or maps. This should be the latest County Assessor's quarter section map (or maps) which indicates the territory to be annexed. Outline the area to be annexed on the maps.

Step 4. Notice Lists of Surrounding and Affected Property Owners

You must submit a list of all property owners and voters in the area to be annexed with their mailing addresses. Forms for affected property owners and voters are

provided. Additionally you must submit the names and addresses of all property owners within 100 feet of the outside edge of the territory to be annexed if the territory is within an adopted urban growth boundary. If the proposed annexation is outside an urban growth boundary but not within a farm or forest zone, you must submit the names and addresses of all property owners within 250 feet. If the area is in a farm or forest zone the list must include all property owners within 500 feet. A *Notice List* form is attached for your use if the list is short. If not please put **this** list on labels or in a label format.

Step 5. Information Sheet

Complete the attached *Boundary Change Data Sheet.*

Step 6. Obtain Endorsement From District

The Board of Directors of the district to which you are annexing must endorse your petition. They may do so by utilizing the attached *Resolution* form. Call the District Board office to determine the process for obtaining that endorsement. If the district is a county service district you may obtain information on this from Ken Martin at 503 222-0955.

Step 8. Obtain Approval of City

If the area to be annexed lies within the boundary of a city you must obtain approval of your petition in the form of a resolution from the city council. A sample resolution is attached.

Step 9. Submit Application To County

After obtaining the District's endorsement submit all materials (along with filing fee required by county) to the County. For MULT. CO. only, submit to County Elections Office at 1040 SE Morrison. For CLACK. CO. only, submit to County Elections Office at 1710 Red soils Court, Oregon City, Oregon 97045.

II. County Review

Below is a summary of the steps which will be taken regarding annexations initiated by this method.

Step 1. Compliance Review

Submitted materials will be checked for compliance with requirements of state statutes

and the Metro Code requirements.

Step 2. Public Hearing Date Set

The **setting** of the hearing date must occur within 45 days of the day the proposal is judged to be complete. The hearing date itself must be between 20 and 50 days of the date the proposed boundary change is submitted to the County.

Step 3. Public Hearing Notice

Notice of the public hearing will be sent to service providers in the area, to the applicant, to adjacent property owners and to appropriate neighborhood or community organizations. Notice of the hearing will be posted in and around the territory to be annexed. The hearing will also be advertised twice in a newspaper of general circulation in the area

Step 4. Staff Study and Report

A staff report will be prepared on each proposed boundary change. This report will cover items specified in the Metro Code including availability of services, compatibility with regional and local plans, etc. This report will be made available to the public 15 days prior to the hearing.

Step 5. Public Hearing

The County Board holds a public hearing. At the hearing the Board will consider criteria laid out in the Metro Code including compliance with urban service agreements, consistency with applicable land use plans and service availability. At the conclusion of the public hearing the Board may approve or disapprove a proposal.

If the Board approves the proposal it must do so with an order containing findings and reasons. The order may be effective immediately if the Board places an emergency clause on it. Otherwise the order must be written and authenticated within 30 days following the decision.

In order to officially change the boundary, the order must be sent to Secretary of State, County Elections and County Assessor and State Revenue Department.

PETITION OF OWNERS OF 100% OF LAND
FOR A DISTRICT ANNEXATION

PETITION FOR ANNEXATION TO THE _____ DISTRICT, a district organized under ORS _____. This petition is filed pursuant to ORS 198.857.

TO: The Board of Commissioners of _____ County.

We, the undersigned property owners of the area described below, hereby petition for, and give our consent to, annexation of the area to the _____ District.

The affected county [ies] is [are]:_____.

The property to be annexed is described as follows:

(Insert Legal Description here OR attach it as Exhibit "A")

PETITION SIGNERS

NOTE: This petition may be signed by qualified persons even though they may not know their property description.

SIGNATURE	PRINTED NAME	ADDRESS	PROPERTY DESCRIPTION				DATE
			LOT #	1/4 SEC.	T	R	

CERTIFICATION OF PROPERTY OWNERSHIP OF

ALL THE LAND AREA

(100% Method – ORS 198.857)

I hereby certify that the attached petition for a proposed boundary change involving the territory described in the petition contains the names of the owners* of all of the land area within the annexation area described in the petition, as shown on the last available complete assessment roll.

NAME _____

TITLE _____

DEPARTMENT _____

COUNTY OF _____

DATE _____

*"Landowner" or "owner of land" means any person shown as the owner of land on the last available assessment roll; however, where such person no longer holds the title to the property, then the terms mean any person entitled to be shown as owner of land on the next assessment roll; or, where land is subject to a written agreement of sale, the terms mean any person shown in the agreement as purchaser to the exclusion of the seller; and the terms include any public agency owning land.

NOTICE LIST FOR SURROUNDING PROPERTY OWNERS

LIST ALL OWNERS OF PROPERTY WITHIN 100 FEET OF THE OUTSIDE BOUNDARY OF THE AREA TO BE ANNEXED IF THE TERRITORY TO BE ANNEXED IS INSIDE AN URBAN GROWTH BOUNDARY. IF THE TERRITORY TO BE ANNEXED IS OUTSIDE AN URBAN GROWTH BOUNDARY THE DISTANCE IS 250 FEET IF IT IS NOT WITHIN A FARM OR FOREST ZONE OR 500 FEET IF IT IS WITH A FARM OR FOREST ZONE.

NAME OF OWNER	ADDRESS	PROPERTY DESIGNATION (Indicate tax lot, section number, Township and Range)
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		

(11) _____

_____

(12) _____

_____

(13) _____

_____

(14) _____

_____

(15) _____

_____

(16) _____

_____

(17) _____

_____

(18) _____

_____

(19) _____

_____

(20) _____

_____

(21) _____

BOUNDARY CHANGE DATA SHEET

I. EXISTING CONDITIONS IN AREA TO BE ANNEXED

A. General location _____

B. Land Area: Acres _____ or Square Miles _____

C. General description of territory. (Include topographic features such as slopes, vegetation, drainage basins, floodplain areas etc.).

_____

_____

D. Describe land uses on surrounding parcels. Use tax lots as reference points.

North: _____

_____

South: _____

_____

East: _____

_____

West: _____

_____

E. Existing Land Use:

Number of single-family units _____ Number of multi-family units _____

Number commercial structures _____ Number industrial structures _____

Public facilities or other uses _____

What is the current use the land proposed to be annexed:

_____

F. Current year total Assessed Value $_____

G. Total existing population _____

II. REASON FOR BOUNDARY CHANGE

A. The County Board is required to " . . . consider the local comprehensive plan for the area and any service agreement executed between a local government and the affected district." The Metro Code spells out additional criteria for consideration (Metro Code 3.09.050):

1. [The County shall] find that the change is consistent with expressly applicable provisions in:

   (A) Any applicable urban service agreement adopted pursuant to ORS 195.065;

   (B) Any applicable annexation plan adopted pursuant to ORS 195.205;

   (C) Any applicable cooperative planning agreement adopted pursuant to ORS 195.020 (2) between the affected entity and a necessary party;

   (D) Any applicable public facility plan adopted pursuant to a statewide planning goal on public facilities and services;

   (E) Any applicable comprehensive plan;

   (F) Any applicable concept plan; and

2. [The County shall] consider whether the boundary change would:

   (A) Promote the timely, orderly and economic provision of public facilities and services;

   (B) Affect the quality and quantity of urban services; and

   (C) Eliminate or avoid unnecessary duplication of facilities or services.

You may wish to provide additional information on all or any of these considerations. Use additional pages if necessary.

_____

_____

_____

_____

_____

_____

_____

_____

III. LAND USE AND PLANNING

A. If the property to be annexed is entirely or substantially undeveloped, what are the plans for future development? Be specific. Describe type (residential, industrial, commercial, etc.), density, etc.

B Is the subject territory inside or outside of the Metro Regional Urban Growth Boundary? _____

C. Do agreements pursuant to ORS 195.065 exist for this area and if so how does this proposal measure up to those agreements?

D. What is the applicable County Planning Designation? _____
or City Planning Designation _____
Does the proposed development comply with applicable regional, county or city comprehensive plans? Please describe.

E. What is the zoning on the territory to be annexed?

F. Can the proposed development be accomplished under current county zoning?
☐ Yes ☐ No

If No, has a zone change been sought from the county either formally or informally.

☐ Yes ☐ No

G. Please describe outcome of zone change request if answer to previous questions was Yes.

H. Is the proposed development compatible with the city's comprehensive land use plan for

the area?

☐ Yes ☐ No ☐ City has no Plan for the area.

Has the proposed development been discussed either formally or informally with any of the following? (Please indicate)

☐ City Planning Commission ☐ City Planning Staff
☐ City Council ☐ City Manager

Please describe the reaction to the proposed development from the persons or agencies indicated above.

I. Please indicate all permits and/or approvals from a City, County, or Regional Government that will be needed for the proposed development. If already granted, please indicate date of approval and identifying number:

APPROVAL	PROJECT FILE #	DATE OF APPROVAL	FUTURE REQUIREMENT
Metro UGB Amendment			
City or County Plan Amendment			
Pre-Application Hearing (City or County)			
Preliminary Subdivision Approval			
Final Plat Approval			
Land Partition			
Conditional Use			
Variance			
Sub-Surface Sewage Disposal			
Building Permit			

Please submit copies of proceedings relating to any of the above permits or approvals which are pertinent to the annexation.

J. If a city and/or county-sanctioned citizens' group exists in the area of the annexation, please list its name and the address of a contact person.

IV. SERVICES AND UTILITIES

A. Please indicate the following:

1. Location and size of nearest water line that can serve the subject area.

2. Location and size of nearest sewer line that can serve the subject area.

3. Proximity of other facilities (storm drains, fire engine companies, etc.) which can serve the subject area

4. The time at which services can be reasonably provided by the district.

5. The estimated cost of extending such facilities and/or services and what is to be the method of financing. (Attach any supporting documents.)

6. Availability of the desired service from any other unit of local government. (Please indicate the government.)

7. What other assurances exist that demonstrate that urban services are now or can be made available?

B. If the territory described in the proposal is presently included within the boundaries of or being served extraterritorially or contractually by any of the following types of governmental units, please so indicate by stating the name or names of the governmental units involved.

City _____ Rural Fire Dist._____

County Service Dist. _____ Sanitary District_____

Hwy. Lighting Dist. _____ Water District_____

Grade School District _____ Drainage District _____

High School Dist._____Diking District_____

Library Dist._____ Park & Rec. Dist._____

Special Road Dist. _____ Other Dist. Supplying Water Service _____

C. If any of the above units are presently servicing the territory (for instance, are residents in the territory hooked up to a public sewer or water system), please so describe.

_____

_____

_____

APPLICANT'S NAME _____

MAILING ADDRESS _____

TELEPHONE NUMBER

_____(Work)

_____ (Res.)

REPRESENTING_____

RESOLUTION NO. _____

A RESOLUTION APPROVING ANNEXATION OF TERRITORY TO THE _____ DISTRICT.

This matter is before the City Council of _____ ; and

It appearing that:

1) The City is required by ORS 198.720 (1) to approve a petition for annexation of City territory into a district.

2) The City Council has received a petition for annexation of certain City territory into the _____ District.

NOW THEREFORE BE IT RESOLVED BY THE COUNCIL OF THE CITY OF _____ _____ AS FOLLOWS:

1) that the City by this resolution approves the proposed annexation with the boundaries described in Exhibit "A" and depicted in Exhibit "B" attached hereto:

2) that the City Recorder of the City is hereby directed to file this Resolution with the _____ County Board at once.

The foregoing Resolution adopted this _____ day of _____, 20____.

_____
(City Recorder)

CITY: _____

ADDRESS_____

_____
(Zip)

_____DISTRICT

RESOLUTION NO. _____

A RESOLUTION APPROVING THE PETITION FOR THE ANNEXATION OF TERRITORY TO THE DISTRICT.

This matter is before the Board of Directors of the District, and it appearing that:

1) Endorsement is required by ORS 198.857 (2) upon receiving consent in writing from the owner[s] of a parcel of land proposed to be annexed.

2) The Board has received the property owner petition meeting the annexation requirement listed above.

3) Part of the territory proposed to be annexed is presently within the City of _____ and the City has consented to the annexation as specified in ORS 198.720 (1).

NOW THEREFORE BE IT RESOLVED BY THE BOARD OF DIRECTORS OF THE _____DISTRICT AS FOLLOWS:

1) That the Board by this resolution endorses the petition for annexation with the boundaries described in Exhibit "A" and depicted in Exhibit "B" attached hereto:

The foregoing Resolution adopted this _____ day of _____, 20____.

_____
(Secretary of Board or District Manager)

DISTRICT: _____

ADDRESS_____

_____
(Zip)