



Department of Land Conservation and Development

2025-2027 HOUSING PLANNING ASSISTANCE – SAMPLE WORK PROGRAMS

The sample work programs below are provided to local jurisdictions as a template to aid them in the development of a detailed series of work tasks, products, and timelines. Please review the applicable sample project work program carefully to ensure it aligns with the proposed project.

For standard projects where work tasks and products are expected to be substantially similar to the sample work program below, the applicant does not need to submit a detailed proposal.

If an applicant expects a project to contain substantially different tasks or work products, they must submit a detailed proposal specifying the work tasks, products, and timelines unique to their proposal. The sample work programs below are not complete scopes of work and will require refinement to suit specific proposals. Priority will be given to proposals that provide well-defined tasks, costs (if requesting a direct grant), products, and timelines.

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Policy Development Code Amendment Sample Work Program

Project Purpose: The purpose of this Project is to prepare a hearings-ready development code or recommendations for comprehensive plan and development code amendments to comply with housing laws, address permitting and land use barriers to housing production, and facilitate housing production, affordability, and choice.

Note: This sample scope is developed for more extensive and complex code amendment projects that involve substantive policy-related changes. Accordingly, this scope has been developed in anticipation of greater depth of review and engagement with the public. For projects that propose more targeted conforming amendments, a separate sample work program is provided below titled “Conforming Development Code Amendment”.

Task 1: Project Kick-Off and Management

Timeline: DATE – DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government’s planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via conference call, or in person, to inquire about establishing project expectations and familiarizing themselves with local concerns. Consultant will verify the action items identified through this initial conference call with the Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- Copy of relevant comprehensive plan and code sections, or other relevant Local Government data or documents

Task 2: Code Audit and Code Concepts

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will review the Local Government's comprehensive plan, zoning ordinance, and other land development documents and regulations (if any) to identify legal or policy issues related to residential development. This will include, but is not limited to, the Consultant determining whether the comprehensive plan and zoning code contains:

- Standards permitting the development of housing in compliance with applicable statutes and Administrative Rules (ORS Chapter 92, 197, 197A, 215 (if applicable), and 227 (if applicable); OAR Chapter 660)
- A clear and objective path for approval of residential development
- Standards, conditions, or procedures that have the effect, either in themselves or cumulatively, of discouraging housing through unreasonable cost or delay
- Criteria or procedures related to housing that may create permitting or land use barriers to housing production.

Note: The scope of issues may be modified to suit specific project needs. However, they must be "housing laws" as defined in Senate Bill 1537 (2024 Session) to be eligible for funding.

The code audit and concepts will be delivered to the Local Government and the Housing Accountability and Production Office (HAPO) for courtesy review. The Local Government and HAPO will provide annotated comments to the consultant for feedback on the code audit and concepts.

(If the project includes an advisory committee) The Local Government will schedule and provide notice and an agenda for an advisory committee meeting to present findings and recommendations of the code review. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the advisory committee meetings.

(If the project includes public engagement) The Local Government will schedule one public workshop or open house to present required middle housing elements based on statutes and administrative rules, code audit findings, and recommendations in the form of code concepts. The Local Government will solicit input from the public on proposed code concepts. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the public meeting(s).

Following the public workshop or open house, the Consultant, in consultation with the Local Government, will consider public input received and make any necessary revisions to the code concepts, if needed.

Note: Engagement and advisory body meetings should be tailored to suit the specific needs of the project. Respective roles and responsibilities for the local government and consultant should

be clearly defined and delineated. Additionally, a planning commission may serve as the advisory committee if it would better suit project needs.

Task 2 Consultant Deliverable:

- Code Audit findings and recommendations (Code Concepts)
- Presentation materials to explain required middle housing elements, findings, and recommendations to the advisory committee, the public, and interest groups (AC #1)
- Advisory committee meeting notes
- Public meeting summary

Task 2 Local Government Deliverables:

- Advisory committee appointments, meeting notices, and agendas
- Public meeting notice(s)
- Feedback on Code Audit findings and recommendations (Code Concepts)

Task 3: Draft Code Update

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

After reviewing the findings and recommendations of the code review with the advisory committee at the first committee meeting, the Consultant will prepare draft updates to the Local Government's zoning ordinance, other development codes (if any), and comprehensive plan (if required), addressing issues identified in Task 2. Draft materials will be delivered to the Local Government and the Housing Accountability and Production Office (HAPO) for courtesy review. The Local Government and HAPO will provide annotated comments to the consultant for proposed refinements to draft code amendments.

(If the project includes an advisory committee) The Local Government will schedule and provide notice and an agenda for an advisory committee meeting to review the draft code update deliverables. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the advisory committee meetings.

Task 3 Consultant Deliverable:

- Draft updates to the zoning ordinance, other development codes (if any), and comprehensive plan (if required)
- Presentation materials to explain draft updates to the advisory committee, the public, and interest groups (AC #2)
- Advisory committee meeting notes

Task 3 Local Government Deliverables:

- Advisory committee meeting notices and agendas

- Annotated comments on draft updates to the zoning ordinance, other development codes (if any), and comprehensive plan (if required)

Task 4: Final Code Update

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

After review of the code update with the advisory committee at a second committee meeting, Consultant will prepare final draft updates to the Local Government's zoning ordinance, other development codes (if any), and comprehensive plan (if required), addressing issues identified in Task 2. The final draft document will be delivered in two formats: double underline/strikeout (showing new and deleted text, respectively) to indicate changes from existing code language; and clean text, in a format suitable for adoption. Final code update materials will be delivered to the Local Government and the HAPO for courtesy review. The Local Government and HAPO will provide annotated comments to the consultant for final amendments before adoption.

(If the project includes an advisory committee) The Local Government will schedule and provide notice and an agenda for one advisory committee meeting to review the final code update deliverables. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the advisory committee meeting.

Task 4 Consultant Deliverable:

- Final draft updates to the zoning ordinance, other development codes (if any), and comprehensive plan (if required)
- Presentation materials to explain final draft updates to the advisory committee, the public, and interest groups (AC #3)
- Advisory committee meeting notes

Task 4 Local Government Deliverables:

- Advisory committee meeting notices and agendas
- Annotated commentary on final draft updates to the zoning ordinance, other development codes (if any), and comprehensive plan (if required)

Task 5: Adoption (if applicable)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Local Government will schedule and provide notice and an agenda for hearings to adopt updates to the Local Government's zoning ordinance, other development codes (if any), and comprehensive plan (if required). The Consultant will coordinate with the Local Government on hearing

arrangements and present updates to the hearings body or bodies.

Note: This task is optional. A local government may lead adoption without support from a DLCD-provided consultant, which provides greater flexibility on project timelines. Additionally, adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 5 Consultant Deliverable:

- Presentation materials to explain final draft updates to the hearings body or bodies

Task 5 Local Government Deliverables:

- Hearings notices, agendas, and minutes

Conforming Development Code Amendment Sample Work Program

Project Purpose: The purpose of this Project is to prepare a hearings-ready development code or recommendations for comprehensive plan and development code amendments to comply with housing laws.

Note: This sample work program is developed for projects that focus primarily on conforming amendments to development codes to conform with housing laws. These projects are narrowly focused and technical in nature, and do not generally involve substantial policy-related decision-making. Accordingly, this sample work program is scaled to reflect a lighter expectation for engagement-related work. For projects that propose complex or policy-oriented code amendments, a separate sample work program is provided above titled “Policy Development Code Amendment”.

Task 1: Project Kick-Off and Management

Timeline: DATE – DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government’s planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via conference call, or in person, to inquire about establishing project expectations and familiarizing themselves with local concerns. Consultant will verify the action items identified through this initial conference call with the Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- Copy of relevant comprehensive plan and code sections, or other relevant Local Government data or documents

Task 2: Code Audit (if applicable)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-

provided consultant]

The Consultant will review the Local Government’s comprehensive plan, zoning ordinance, and other land development documents and regulations (if any) to identify legal or policy issues related to residential development. This will include, but is not limited to, the Consultant determining whether the comprehensive plan and zoning code contains:

- Standards permitting the development of housing in compliance with applicable statutes and Administrative Rules (ORS Chapter 92, 197, 197A, 215 (if applicable), and 227 (if applicable); OAR Chapter 660)
- A clear and objective path for approval of residential development
- Standards, conditions, or procedures that have the effect, either in themselves or cumulatively, of discouraging housing through unreasonable cost or delay
- Criteria or procedures related to housing that may create permitting or land use barriers to housing production.

The code audit will be delivered to the Local Government and the Housing Accountability and Production Office (HAPO) for courtesy review. The Local Government and HAPO will provide annotated comments to the consultant for feedback on the code audit and concepts.

Note: The specific issue or issues addressed for this sample scope of work will likely vary between local contexts. It is also possible that the local government has identified specific compliance issues to address beforehand, which obviates the need for a code audit. Therefore, this task may be modified to suit project needs.

Task 2 Consultant Deliverable:

- Code Audit findings

Task 2 Local Government Deliverables:

- Feedback on Code Audit findings

Task 3: Draft Code Update

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will prepare draft updates to the Local Government’s zoning ordinance, other development codes (if any), and comprehensive plan (if required), addressing issues identified in Task 2. Draft code update materials will be delivered to the Local Government and the Housing Accountability and Production Office (HAPO) for courtesy review. The Local Government and HAPO will provide annotated comments to the consultant for proposed refinements to draft code amendments.

Note: With the expectation that this project type includes technical, conforming amendments, this sample work program does not include engagement or advisory-body tasks or deliverables to avoid expending community time and resources engaging on a technical topic where feedback has minimal impact on the project outcome. The local government may propose project updates to relevant decision bodies, such as a planning commission or city council/county commission, where necessary for project success.

Task 3 Consultant Deliverable:

- Draft updates to the zoning ordinance, other development codes (if any), and comprehensive plan (if required)

Task 3 Local Government Deliverables:

- Annotated comments on draft updates to the zoning ordinance, other development codes (if any), and comprehensive plan (if required)

Task 4: Final Code Update

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will prepare final draft updates to the Local Government's zoning ordinance, other development codes (if any), and comprehensive plan (if required), addressing issues identified in Task 2. The final draft document will be delivered in two formats: double underline/strikeout (showing new and deleted text, respectively) to indicate changes from existing code language; and clean text, in a format suitable for adoption. Final code update materials will be delivered to the Local Government and the HAPO for courtesy review. The Local Government and HAPO will provide annotated comments to the consultant for final amendments before adoption.

Task 4 Consultant Deliverable:

- Final draft updates to the zoning ordinance, other development codes (if any), and comprehensive plan (if required)

Task 4 Local Government Deliverables:

- Annotated commentary on final draft updates to the zoning ordinance, other development codes (if any), and comprehensive plan (if required)

Task 5: Adoption (if applicable)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

Local Government will schedule and provide notice and an agenda for hearings to adopt updates to

the Local Government's zoning ordinance, other development codes (if any), and comprehensive plan (if required). The Consultant will coordinate with the Local Government on hearing arrangements and present updates to the hearings body or bodies.

Note: This task is optional. A local government may lead adoption without support from a DLCD-provided consultant, which provides greater flexibility on project timelines. Additionally, adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 5 Consultant Deliverable:

- Presentation materials to explain final draft updates to the hearings body or bodies

Task 5 Local Government Deliverables:

- Hearings notices, agendas, and minutes

Contextualized Housing Need Sample Work Program

(In support of HCA & HPS projects)

Project Purpose: The purpose of this Project is to prepare a Contextualized Housing Need (CHN) analysis as described in [OAR 660-008-0075](#) that relates a city's allocated housing need and housing production target, as provided in ORS 184.451 to 184.455 and OAR 660-008-0045(7), to local qualitative and quantitative information. This analysis uses current and future housing needs, along with population and market trends, to evaluate fair housing choice and identify fair housing issues in the Local Government to affirmatively further fair housing. The output of the analysis is a determination of the needed types, characteristics, and locations of housing that a Local Government must plan for in its six- or eight-year housing capacity and production cycle in order to mitigate and remedy the identified fair housing issues in furtherance of fair housing choice.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant shall hold a meeting with the Local Government to kick off the project with Local Government staff. The Consultant will contact Local Government project staff via conference call, or in person to inquire about establishing project expectations and familiarize themselves with Local Government-specific concerns. At the project kick off, Consultant will obtain necessary information and background from Local Government project staff to familiarize Consultant with local conditions and with Local Government's planning documents. The consultant will also use the kickoff to confirm the objectives of the project laid out in this Contract with the Local Government, refine the project schedule established in this Contract with Local Government (meaning add more detail as necessary to the established schedule), and provide necessary information to Local Government to allow Local Government to prepare for the Project.

The Consultant will have [monthly/biweekly] check-ins with the Local Government project staff to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- Copy of relevant comprehensive plan, housing related planning documents, or other relevant Local Government data or documents

Task 2: Data Collection and Analysis

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will gather relevant data from the housing production dashboard, housing equity indicators dashboard, equitable engagement already conducted by the Local Government, the Department's hosted data repository as provided by OAR 660-008-0075(3), and any additional information as provided in OAR 660-008-0075(4) if available and recent within the last five years to understand current and future housing needs, along with population and market trends, to evaluate fair housing choice, and identify fair housing issues in the Local Government to affirmatively further fair housing. The Local Government will provide the Consultant with access to all relevant available local data. The CHN must include:

- An affordability analysis including at a minimum a review of market conditions affecting the provision of needed housing including existing and expected barriers to the development of needed housing;
- An analysis of past discriminatory actions or practices related to land and housing access including, as practicable given information and resource availability, mapping of the geographies impacted by these actions and comparing those geographies' relationship to current patterns of segregation as well as affluence and poverty as illustrated in the housing equity indicators;
- An analysis of fair housing choice across the following issue areas for communities of color, low-income communities, individuals with disabilities, and tribal communities that concludes with the identification and evaluation of fair housing issues within the city:
 - Housing tenure and wealth building opportunities;
 - Permanent housing to resolve homelessness;
 - Accessible and adoptable housing;
 - Access to community assets and mitigation of exposure to harms;
 - Housing stability, anti-displacement and displacement mitigation;
 - Addressing and disrupting patterns of segregation, and their correlation with concentrated areas of affluence and poverty;
 - Any issue areas the Local Government is required to address in other requirements or regulations, including Local Governments subject to OAR 660-012-0315(1) and Local Governments within Metro with Region 2040 centers, as defined in OAR 660-012-0005(24); and
 - Any other issue areas that appear to exist based on occurrences of disparate housing needs in a Local Government across protected classes and named communities in needed housing as provided in ORS 197A.018;

Contextualized Housing Needs Summary Document

While this Contextualized Housing Need analysis will initially be produced as a stand-alone memorandum, it will later become a section of the Housing Production Strategy that clearly describes and identifies the housing types, characteristics, and locations needed to remedy, or mitigate the

identified fair housing issues in order to achieve fair housing choice, and meet the Local Government's housing production target while affirmatively furthering fair housing. The Consultant will present the draft to a future Local Government's Advisory Committee meeting (if set up as part of the Project) and make it available for public comment.

Task 2 Consultant Deliverables:

- Memorandum summarizing findings from the affordability analysis
- Memorandum summarizing findings from the analysis of past discriminatory actions or practices
- Memorandum summarizing findings from the analysis of fair housing choice
- Conclusion from the three analysis noted above that clearly describes and identifies the housing types, characteristics, and locations needed to remedy, or mitigate the identified fair housing issues in order to achieve fair housing choice, and meet the Local Government's housing production target while affirmatively furthering fair housing.

Task 2 Local Government Deliverables:

- Copy of relevant comprehensive plan, housing related planning documents including equitable engagement summaries, or other relevant Local Government data or documents
- Agendas and presentations/meeting materials for meetings (likely by videoconference)

Task 3: Equitable Engagement

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Contextualized Housing Need must be informed by equitable engagement that solicits feedback from community members of needed housing including protected classes and named communities in needed housing as provided in ORS 197A.018, that prioritizes and actively seeks to center communities of color, low-income communities, individuals with disabilities, and tribal communities, to ensure these perspectives are meaningfully incorporated and ground truthing the quantitative data analysis work of task 2.

Note: Except for the requirement to center tribal communities by coordinating and consulting with tribes, if the Local Government has comprehensive housing-related engagement feedback completed within the last five years that sufficiently informs the contextualized housing need requirements and the Local Government finds that additional equitable engagement would not align with best practices in the Department's Equitable Engagement Toolkit, the Local Government may rely entirely on existing engagement feedback forego task 3 scope of work. Instead, the Local Government must include an explanation for this determination as part of the equitable engagement summary.

The Consultant will help plan for equitable engagement, including helping to define the questions and equitable engagement methods and/or tactics to solicit feedback. Local Government project staff will

connect Consultant with existing networks, support facilitation (if appropriate), and support successful execution of equitable engagement.

The Local Government will satisfy the engagement requirement to center tribal communities when notice has been made to all tribes with ancestral connection to land within the Local Government's jurisdiction or approved expansion areas from the Oregon Legislative Commission on Indian Services by inviting government-to-government consultation and staff coordination in the development of the Local Government's contextualized housing need.

Equitable Engagement Summary Document

Following equitable engagement, the Consultant will produce an equitable engagement summary that includes a list and description of the types of interested parties and communities who comprise community members of needed housing including protected classes and named communities in needed housing as provided in ORS 197A.018, especially with regard to communities of color, low-income communities, individuals with disabilities, and tribal communities,

While this equitable engagement summary will initially be produced as a stand-alone memorandum, it will later become a section of the HPS. The Consultant will present the draft to a future Local Government's Advisory Committee meeting (if set up as part of the HPS project) and make it available for public comment.

Note: the findings from the equitable engagement should be connected to the analysis and findings of the Contextualized Housing Need as outlined in task 2.

Task 3 Consultant Deliverables:

- Outline of suggested questions
- A list and description of interested parties engaged
- A summary of how interested parties were engaged (including the Local Government's Advisory Committee if one was formed as part of the Project), including why they were engaged, engagement methods used, a list of each engagement effort or event being used to develop the CHN, and the interested parties, communities, or tribes who they may still be underrepresented in the engagement process;
- A summary of feedback received from each engagement effort or event, as well as description of the major feedback themes attributed to the likely impacted interested parties, communities, and tribes, including how each major feedback theme influenced the identification of fair housing issues and determination of the needed housing types, characteristics, and locations in alignment with program principles or not;
- A summary that outlines an evaluation of how the Local Government could improve equitable engagement practices for future housing engagement efforts relevant to the action selection process of an HPS

Task 3 Local Government Deliverables:

- List of existing interested parties, communities, and tribes for equitable engagement

- List of most recent tribes with ancestral connection to land within the Local Government from the Oregon Legislative Commission on Indian Services
- Notice to tribes with ancestral connection to land within the Local Government from the Oregon Legislative Commission on Indian Services that invites government-to-government consultation and staff coordination in the development of the Local Government's contextualized housing need
- Any follow up communication, consultation, and coordination as requested by the tribes invited for government-to-government consultation and staff coordination
- Agendas and presentations/meeting materials for meetings (likely by videoconference) with the Local Government's Advisory Committee

Task 4: Draft and Final Contextualized Housing Need (*applicable only if the CHN will be adopted separately from the HPS*)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The draft Contextualized Housing Need will include the following:

- All elements of task 2 and 3 as required by OAR 660-008-0075;
- Clear conclusion that describes the needed types, characteristics, and locations of housing that the Local Government must plan for in its six-or eight-year housing production cycle in order to mitigate and remedy the identified fair housing issues in furtherance of fair housing choice;

Following review by Local Government project staff and revisions as needed, the Consultant will produce a draft CHN for public review and comments by the Local Government's Advisory Committee, Planning Commission, City Council, and interested parties. The Consultant will summarize Advisory Committee, Planning Commission, City Council, and interested parties' comments on the draft (if addressing comments would require major updates) or make minor updates to the draft following the Advisory Committee, Planning Commission, City Council, and interested party review. Following public review and comment, the Consultant will produce a Final CHN document.

Task 4 Consultant Deliverables:

- Public Review Draft CHN;
- Agenda and presentation/meeting materials for Advisory Committee meeting;
- Presentation to Planning Commission;
- Presentation to City Council; and
- Final Contextualized Housing Need.

Task 4 Local Government Deliverable:

- Agendas and presentations/meeting materials for meetings (likely by videoconference)

Task 5: Adoption (*applicable only if the CHN will be adopted separately from the HPS*)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Local Government will schedule and provide notice and an agenda for hearings to adopt the CHN. The Consultant will coordinate with the Local Government on public hearing arrangements and present updates to the hearings body or bodies.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 5 Consultant Deliverable:

- Presentation materials to explain final draft updates to the hearings body or bodies

Task 5 Local Government Deliverables:

- Hearings notices, agendas, and minutes

Housing Capacity Analysis Sample Work Program

Project Purpose: The purpose of this Project is to prepare a Housing Capacity Analysis, including hearings-ready draft comprehensive plan amendments, as described in ORS 197A.350 or 197A.335. This analysis will incorporate the state-provided Housing Need Allocation.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via conference call, or in person to inquire about establishing project expectations and familiarize themselves with city-specific concerns. The Consultant will verify the action items identified through this initial conference call with the participating Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined and with mutual agreement by the Local Government and the Consultant.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- Copy of relevant comprehensive plan and code sections
- Building permit and housing data to support the Housing Capacity Analysis.

Task 2: Housing Need Allocation Review

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will incorporate the state-provided Housing Need Allocation. This work will inform the determination of residential land need in Task 4. The Consultant will present findings at a project advisory committee meeting.

Task 2 Consultant Deliverables:

- State provided Housing Need Allocation
- Presentation materials to overview Housing Need Allocation
- Advisory committee meeting notes

Task 2 Local Government Deliverables:

- Advisory committee appointments
- Advisory committee meeting notices and agendas

Task 3: Buildable Lands Inventory (BLI)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will prepare a draft inventory of buildable land inventory consistent with OAR chapter 660, division 8, as applicable. The BLI will be used to determine the Local Government's residential land need in Task 4. The BLI will be developed based on discussion with a project advisory committee at one or more committee meetings.

The Local Government will schedule and provide notice and an agenda for one advisory committee meeting to review the draft BLI product. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the advisory committee meetings. The advisory committee may consider more than one deliverable at a meeting.

The Local Government will schedule one public workshop or open house to present housing needs allocation and buildable lands data and findings. The Local Government will solicit input from the public on the draft deliverables. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the public meeting(s).

Task 3 Consultant Deliverables:

- Draft BLI
- Presentation materials to explain preliminary analyses and findings to the advisory committee, the public, and interest groups
- Advisory committee meeting notes
- Public meeting summary

Task 3 Local Government Deliverable:

- Advisory committee meeting notices and agendas
- Public meeting notice(s)

Task 4: Development Ready Lands Inventory (DRLI)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will prepare a draft development ready lands inventory (DRLI) consistent with ORS 197A.210 and OAR Chapter 660, division 8, as applicable. The DRLI will be developed based on discussion with a project advisory committee at one or more committee meetings.

The Local Government will schedule and provide notice and an agenda for one advisory committee meeting to review the draft DRLI. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the advisory committee meetings. The advisory committee may consider more than one deliverable at a meeting.

The Local Government will schedule one public workshop or open house to present housing needs allocation, buildable lands, and development ready lands inventory data and findings. The Local Government will solicit input from the public on the draft deliverables. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the public meeting(s).

Task 4 Consultant Deliverables:

- Draft DRLI
- Presentation materials to explain preliminary analyses and findings to the advisory committee, the public, and interest groups
- Advisory committee meeting notes
- Public meeting summary

Task 4 Local Government Deliverable:

- Advisory committee meeting notices and agendas
- Public meeting notice(s)

Task 5: Residential Land Needs Analysis (RLNA)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

Based on the outcomes of previous tasks, the Consultant will prepare a draft RLNA that addresses how much land and what zoning the Local Government needs to accommodate its Housing Need, comparing the demand and supply provided in the deliverables produced in Tasks 2 and 3. The RLNA will be developed based on discussions with a project advisory committee at one or more committee meetings.

If the analysis shows that the Housing Need cannot be accommodated by the Local Government's

existing comprehensive plan, the RLNA will be developed concurrently with Task 6 in order to consider accommodating Housing Needs through changes to the comprehensive plan and land use regulations as required by OAR chapter 660, divisions 8 and 24.¹

The Local Government will schedule and provide notice and an agenda for one advisory committee meeting to review the draft RLNA product. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the advisory committee meetings. The advisory committee may consider more than one deliverable at a meeting.

Task 5 Consultant Deliverables:

- Draft residential land need analysis
- Presentation materials to introduce preliminary residential land need analysis and findings to the advisory committee, the public, and interest groups (AC #3)
- Advisory committee meeting notes

Task 5 Local Government Deliverable:

- Advisory committee meeting notices and agendas

Task 6: Measures to Accommodate Needed Housing

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will identify options for changes to the Local Government's comprehensive plan and land use regulations to address housing and residential land needs determined in previous tasks. This task may be completed concurrently with Task 5.

The Local Government will schedule and provide notice and an agenda for one or two advisory committee meetings to review the housing-accommodation product. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the advisory committee meetings. The advisory committee may consider more than one deliverable at a meeting.

The Local Government will schedule one public workshop or open house to present draft residential land need and housing accommodation data, findings, and recommendations. The Local Government will solicit input from the public on the draft deliverables. The Consultant will coordinate with Local Government on meeting arrangements and facilitate the public meeting(s).

Task 6 Consultant Deliverables:

- Options for changes to the Local Government's comprehensive plan and land use regulations to address housing and residential land needs

¹ Cities should note that if the analysis finds that all identified housing needs cannot be met by the existing Comprehensive Plan, the city will need to adopt Comprehensive Plan amendments necessary to meet all identified needs concurrently with adoption of the HCA, per OAR 660-024-0050(4).

- Presentation materials to introduce housing accommodation recommendations to the advisory committee, the public, and interest groups
- Advisory committee meeting notes
- Public meeting summary
- Final draft hearings-ready HCA

Task 6 Local Government Deliverables:

- Advisory committee meeting notices and agendas
- Public meeting notice(s)

Task 7: Adoption (if applicable)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Local Government will schedule and provide notice and an agenda for hearings to adopt the Housing Capacity Analysis and associated updates to the Local Government's comprehensive plan and development code. The Consultant will coordinate with Local Government on hearing arrangements and present updates to the hearings body or bodies.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 7 Consultant Deliverable:

- Presentation materials to explain final draft updates to the hearings body or bodies

Task 7 Local Government Deliverables:

- Hearings notices, agendas, and minutes

Housing Production Strategy Sample Work Program

Project Purpose: The purpose of this Project is to prepare a Housing Production Strategy (HPS) as described in ORS 197A.100 and [OAR 660-008-0200](#) that outlines the list of specific actions a jurisdiction plans to adopt to ensure the opportunity for and promotes the provision of needed housing to meet the housing production target, by affordability bracket, with net new units for the jurisdiction's six-or eight year housing production target. The housing production strategy must demonstrate that the identified actions collectively support the jurisdiction's needed housing types, characteristics, and locations as identified through the contextualized housing need as provided in OAR 660-008-0075.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant shall hold a meeting with the Local Government to kick off the project with Local Government staff. The Consultant will contact Local Government project staff via conference call, or in person to inquire about establishing project expectations and familiarize themselves with Local Government-specific concerns. At the project kick off, Consultant will obtain necessary information and background from Local Government project staff to familiarize Consultant with local conditions and with Local Government's planning documents. The consultant will also use the kickoff to confirm the objectives of the project laid out in this Contract with the Local Government, refine the project schedule established in this Contract with Local Government (meaning add more detail as necessary to the established schedule), and provide necessary information to Local Government to allow Local Government to prepare for the Project.

The Consultant will have [monthly/biweekly] check-ins with the Local Government project staff to discuss major project milestones and work products, address questions, and identify follow-up actions.

The Local Government project staff will complete required pre-HPS survey through the Housing Portal and provide a copy of survey responses to the Consultant.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- Copy of relevant comprehensive plan and code sections
- A review of actions already implemented by the Local Government that includes:
 - A copy of the Local Government's recently completed pre-HPS survey that meets requirements of ORS 197A.115 and OAR 660-008-0200(2)(a)(A) and;

- A reflection on each action in the pre-HPS survey and its efficacy in producing net new needed housing types, characteristics, and locations and in remedying or mitigating the fair housing issue or issues the action was intended to respond to (OAR 660-008-200(2)(a)(B)(i-iii).

Task 2: Equitable Engagement

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will plan equitable engagement specifically to developing the housing production strategy and in particular the selection of the actions and the assessment of benefits and burdens as required by OAR 660-008-0200(2)(b)(K). Equitable engagement must solicit feedback from producers of needed housing, and particularly those who represent or serve communities of color, low-income communities, individuals with disabilities, and tribal communities, including tribal governments to ensure these perspectives are meaningfully informing the action selection process of the HPS.

The Consultant will help plan for equitable engagement, including helping to define the questions and equitable engagement methods and/or tactics to solicit feedback. Local Government project staff will connect Consultant with existing networks, support facilitation (if appropriate), and support successful execution of equitable engagement.

The Local Government will satisfy the engagement requirement to center tribal communities when notice has been made to all tribes with ancestral connection to land within the Local Government's jurisdiction or approved expansion areas from the Oregon Legislative Commission on Indian Services by inviting government-to-government consultation and staff coordination in the development of the Local Government's contextualized housing need.

Equitable Engagement Summary Document

Following equitable engagement, the Consultant will produce an equitable engagement summary that includes a list and description of the types of interested parties and communities who comprise producers of needed housing who represent or serve communities of color, low-income communities, individuals with disabilities, and tribal communities,

While this equitable engagement summary will initially be produced as a stand-alone memorandum, it will later become a section of the HPS. The Consultant will present the draft to a future Local Government's Advisory Committee meeting (if set up as part of the HPS project) and make it available for public comment.

Task 2 Consultant Deliverables:

- Outline of suggested questions
- A list and description of interested parties engaged

- A summary of how interested parties were engaged (including the Local Government's Advisory Committee if one was formed as part of the HPS project), including why they were engaged, engagement methods used, a list of each engagement effort or event being used to select the actions the HPS
- A summary of feedback received from each engagement effort or event, as well as description of the major feedback themes attributed to the likely impacted interested parties, including how each major feedback theme influenced the selection of actions in the HPS or not
- A summary that outlines an evaluation of how the Local Government could improve equitable engagement practices for future housing engagement efforts relevant to the action selection process of an HPS

Task 2 Local Government Deliverables:

- List of existing interested parties, communities, and tribes for equitable engagement
- List of most recent tribes with ancestral connect to land within the Local Government from the Oregon Legislative Commission on Indian Services
- Agendas and presentations/meeting materials for meetings (likely by videoconference) with the Local Government's Advisory Committee
- Notice to tribes with ancestral connection to land within the Local Government from the Oregon Legislative Commission on Indian Services that invites government-to-government consultation and staff coordination in the development of the Local Government's contextualized housing need
- Any follow up communication, consultation, and coordination as requested by the tribes invited for government-to-government consultation and staff coordination
- Agendas and presentations/meeting materials for meetings (likely by videoconference) with the Local Government's Advisory Committee

Task 3: Actions to Meet Current and Future Housing Need

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

For the actions that are recommended for inclusion in the Local Government's HPS, the Consultant will produce the following for each action, based on Consultant's evaluation, input from staff, and feedback gathered through equitable engagement focused on action selection:

- A title and description of the action;
- A title and description of the alternate action, if any;
- The identification number from the HPS Menu of Actions;
- An adoption year for the action;
- A timeline for when the action will be implemented;
- The action's expected magnitude of impact on the development of needed housing over the 6- or 8-year housing production target horizon, including (where possible/applicable)

an estimate of the number of housing units that may be created, and the time frame over which the strategy is expected to impact needed housing;

- A description of critical steps that all relevant staff and departments of the Local Government and other interested parties and partners must take to implement the action;
- A description of how the Local Government will assess and track the results of the action;
- The housing need met in terms of any fair housing issues the action is expected to mitigate or resolve; the needed housing types the Local Government expects the action to produce, and the needed housing characteristics the Local Government expects the action to produce, including at a minimum tenure and affordability per the income brackets provided in ORS 184.453(4), and the needed housing locations the Local Government expects the action to produce, and the major feedback theme the action is responsive to;
- An analysis of the income and demographic populations that the Local Government anticipates to receive benefit or burden from the action, including but not limited to low-income communities, Communities of color; individuals with disabilities; and Tribal communities; Opportunities, constraints, or negative externalities associated with adoption of the action.

Task 3 Consultant Deliverables:

- Memorandum summarizing existing measures, previously identified actions, and additional actions for consideration to address contextualized housing needs;
- Memorandum that further evaluates and refines selected actions, including an analysis of who is most likely to benefit from or be burdened by each action – particularly for low income communities, communities of color, individuals with disabilities, and Tribal communities;
- Memorandum that summarizes the information required per the list above and as required by OAR 660-008-0200(2) for each action;

Task 3 Local Government Deliverable:

- Agendas and presentations/meeting materials for meetings (likely by videoconference)

Task 4: Draft and Final HPS Report

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The draft HPS Report will include the following:

- Contextualized housing needs that includes all elements as required by OAR 660-008-0075 and clearly describes the needed types, characteristics, and locations of housing that the Local Government must plan for in its six-or eight-year housing production cycle in order to mitigate and remedy the identified fair housing issues in furtherance of fair housing choice;

- Summaries of existing measures, action refinement including analysis of benefits and burdens, and final proposed actions from Task 3;
- The Local Government's plan for monitoring progress the results of each action.

Following review by Local Government project staff and revisions as needed, the Consultant will produce a draft HPS for public review and comment by the Local Government's Advisory Committee, Planning Commission, City Council, and interested parties. The Consultant will summarize Advisory Committee, Planning Commission, City Council, and interested parties' comments on the draft (if addressing comments would require major updates) or make minor updates to the draft following the Advisory Committee, Planning Commission, City Council, and interested party review. Following public review and comment, the Consultant will produce a Final HPS document.

Task 4 Consultant Deliverables:

- Public Review Draft HPS;
- Agenda and presentation/meeting materials for Advisory Committee meeting;
- Presentation to Planning Commission;
- Presentation to City Council; and
- Final Housing Production Strategy.

Task 4 Local Government Deliverable:

- Agendas and presentations/meeting materials for meetings (likely by videoconference)

Task 5: Adoption (if applicable)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Local Government will schedule and provide notice and an agenda for hearings to adopt the Housing Production Strategy. The Consultant will coordinate with the Local Government on public hearing arrangements and present updates to the hearings body or bodies.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 5 Consultant Deliverable:

- Presentation materials to explain final draft updates to the hearings body or bodies

Task 5 Local Government Deliverables:

- Hearings notices, agendas, and minutes

Housing Implementation Plan Sample Work Program

*****Please note that a Housing Implementation Plan is a generic project type and can include a variety of tasks and deliverables. It is neither a Housing Capacity Analysis, Contextualized Housing Need Analysis, nor a Housing Production Strategy. *****

Project Purpose: The purpose of this Project is to prepare a plan, document, or comprehensive plan amendment(s) identifying or implementing the most promising actions a Local Government can take to facilitate housing production, affordability, and choice. This document is not identified in statute or administrative rule, and it may encompass any housing-related issue that is neither a Housing Capacity Analysis, Contextualized Housing Need Analysis, nor a Housing Production Strategy.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via a conference call, or in person, to inquire about establishing project expectations and familiarizing themselves with local concerns. The Consultant will verify the action items identified through this initial conference call with the Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- Copy of relevant Local Government data or documents

Task 2: Background Report

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will prepare a background report containing the following subjects:

- A summary of housing needs within the Local Government.
- Past actions undertaken by the Local Government to develop and/or implement actions to meet housing needs.
- Tools, policies and actions available to develop and implement a successful Housing Implementation Plan.
- An analysis of opportunities and constraints for identified tools and actions.

The Local Government and Consultant will identify and facilitate equitable engagement with interested party groups including community based and advocacy organizations and housing developers. The Local Government and Consultant will solicit feedback from interested parties to identify tools, policies, and actions needed to preserve existing and facilitate the development of new affordable housing options.

The Local Government will schedule, and provide notice and an agenda, for one Advisory Committee (AC) meeting to review the background report. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the Advisory Committee meetings. The Advisory Committee may consider more than one deliverable at a meeting.

Task 2 Consultant Deliverables:

- Background Report
- Presentation materials to explain background report analysis and findings to the Advisory Committee, the public, and interest groups
- Advisory Committee meeting notes
- Equitable Engagement Summary

Task 2 Local Government Deliverables:

- Identify interested party groups, meeting invitations, and agendas
- Advisory Committee appointments, meeting notices, and agendas
- Public meeting notice(s)

Task 3: Draft Housing Implementation Plan

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will prepare a draft Housing Implementation Plan containing the following subjects:

- A description and analysis of actions the Local Government will take to promote the development of needed housing.
- The draft Housing Implementation Plan may also consider the following elements:
 - Any opportunities, constraints or negative externalities associated with adoption of the elements of the Housing Implementation Plan

- Alternatives analyses if the specific Housing Implementation Plan has options related to cost charges, regulatory standards, equity considerations, or other variables.
- Actions necessary for the Local Government and other interested parties to take in order to implement the Housing Implementation Plan

The Local Government will schedule and provide notice and an agenda for an Advisory Committee meeting to review the draft Housing Implementation Plan. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the Advisory Committee meetings. The Advisory Committee may consider more than one deliverable at a meeting.

The Local Government will schedule a public workshop or open house to present the draft Housing Implementation Plan. The Local Government will solicit feedback from the public on the draft deliverables. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the public meeting(s).

Task 3 Consultant Deliverable:

- Draft Housing Implementation Plan
- Presentation materials to explain preliminary analyses and findings to the Advisory Committee, the public, and interest groups
- Advisory Committee meeting notes
- Public meeting summary

Task 3 Local Government Deliverables:

- Advisory Committee meeting notices and agendas
- Public meeting notice(s)

Task 4: Hearings-ready Ordinance, Resolution, and/or Final Housing Implementation Plan

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will prepare a hearings-ready draft of an ordinance and/or another final document.

The Local Government will schedule and provide notice and an agenda for an Advisory Committee meeting to review the hearings-ready ordinance, resolution, and/or final Housing Implementation Plan, or similar product. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate the Advisory Committee meetings.

Please note: Adoption of a hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 4 Consultant Deliverable:

- Hearings-ready draft ordinance, resolution, and/or another final document
- Presentation materials to explain preliminary analyses and findings to the Advisory Committee, the public, and interest groups
- Advisory Committee meeting notes

Task 4 Local Government Deliverables:

- Advisory Committee meeting notices and agendas
- Public meeting notice(s)

Urban Growth Boundary (UGB) Land Exchange Sample Work Program

Project Purpose: The purpose of this Project is to complete an Urban Growth Boundary (UGB) Land Exchange, consistent with ORS 197A.285 and OAR 660-024-0070. A UGB Land Exchange exchanges land inside of the UGB for land outside of the UGB. A land exchange must include relevant Goal 14 locational and priority analysis required for UGB amendments.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with Local Government-specific concerns. The Consultant will verify the action items identified through this initial conference call with the Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant and the Local Government shall coordinate with the County staff regarding the UGB land exchange regarding any information needed for lands within the UGB study area, discussion of the process and sequencing for UGB amendment decisions by the Local Government and County, determination of the County zoning to be applied to lands removed from the UGB, and the process for department review of the UGB amendment if required by OAR 660-024-0080.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- A copy of relevant building permit, development, and public facilities data or documents needed to support the UGB land exchange.

Task 2: UGB Alternatives Analysis and Findings

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-

provided consultant]

The process for a UGB land exchange is similar to the process for expanding a UGB. OAR 660-024-0070 describes the process for UGB adjustments. The process requires removing land from the UGB and urban reserves, as well as adding land to take its place. The proposal must demonstrate compliance with the requirements of OAR Chapter 660, Divisions 24 and 21, including considerations of public facilities and consistency in the use of land removed and added to the UGB. The analysis and resultant actions must be based on the Local Government's most recently adopted Housing Capacity Analysis and Urban Reserves (where applicable).

The Consultant will prepare a UGB alternatives analysis and findings report, consistent with Goal 14, ORS 197A.285, and OAR Chapter 660, Divisions 021 (where applicable) and 024. The analysis will define the preliminary study area (197A.285 and OAR 660-024-0065), and prioritize the following lands for inclusion in a UGB:

- a. Designated urban reserves
- b. Acknowledged exceptions and non-resource lands
- c. Marginal lands under ORS 197.247 (1991 Edition)
- d. Land that is not predominately high-value farmland as defined in ORS 195.300
- e. Land that is predominately high-value farmland as defined in ORS 195.300

The alternatives analysis must address the requirements of OAR 660-024-0070(3) regarding the quantity of buildable land to be added to, and removed from, the UGB. For residential exchanges, "buildable land" should be determined consistent with the definition provided in OAR 660-008-0005(6). For employment land exchanges "buildable lands" shall be consistent with applicable requirements in OAR 660-009.

Within the preliminary study area, the Consultant will identify smaller subareas and complete a review of lands consistent with the relevant state policies (OAR 660-024-0067). In general, this includes evaluation based on the following characteristics: existing urban reserves, exception lands, soil classes, constraints (e.g., floodway or wetlands), lot sizes, and other characteristics. This will include an evaluation of Goal 14 locational factors, which are:

1. Efficient accommodation of identified land needs;
2. Orderly and economical provision of public facilities and services;
3. Comparative environmental, energy, economic and social consequences; and
4. Compatibility of the proposed urban uses with nearby agricultural and forest activities occurring on farm and forest land outside the UGB.

The Consultant will work with the Local Government staff and other interested parties (identified by Local Government staff) to develop this analysis. Based on this alternatives analysis, the Consultant will develop findings to support the UGB land exchange proposal, to present at a public work session with Planning Commission and City Council.

Task 2 Consultant Deliverables:

- Memorandum presenting the alternatives analysis maps and overview of the analysis

- Memorandum that identifies Comprehensive Plan policy recommendations that resulted from the UGB land exchange analysis

Task 2 Local Government Deliverables:

- Meeting notices, agendas, and minutes

Task 3: Public Work Sessions and Hearings

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will hold four meetings with the Local Government's Planning Commission and City Council, including:

- One public work session with the Planning Commission to discuss and answer questions about the proposed UGB land exchange;
- One public work session with the City Council to discuss and answer questions about the proposed UGB land exchange;
- One hearing with the Planning Commission to consider the proposed UGB land exchange; and
- One hearing with the City Council to consider the proposed UGB land exchange.

The Consultant will hold two meetings with the County Planning Commission and Board of Commissioners, including:

- One hearing with the Planning Commission to consider the proposed UGB land exchange; and
- One hearing with the Board of County Commissioners to consider the proposed UGB land exchange.

The Consultant will develop staff reports and meeting materials, with guidance from the Local Government staff, for each meeting with Planning Commission, City Council, or County Board of Commissioners.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 3 Consultant Deliverables:

- Staff reports and meeting materials for all public work sessions and hearings
- Draft and final findings for City Council and County Commission decisions to approve the land exchange

Task 3 Local Government Deliverable:

- Public work session and hearing notices and agendas

Urban Growth Boundary (UGB) Amendment Sample Work Program

*****Please note that, to qualify for funding, a UGB amendment requires an identified deficiency of residential lands in a Housing Capacity Analysis. This work program assumes that a need has already been identified.*****

Project Purpose: The purpose of this Project is to prepare all materials and support processes necessary to amend a city Urban Growth Boundary (UGB) as provided in OAR Chapter 660, Division 024 to address an identified deficiency of lands to accommodate an allocated housing need. A UGB Amendment occurs after a deficiency is identified in a Housing Capacity Analysis (HCA) and must be adopted concurrently with both the analysis and measures to efficiently accommodate housing need within the UGB.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with local government-specific concerns. The Consultant will verify the action items identified through this initial conference call with the local government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant and the Local Government shall coordinate with County staff regarding the UGB amendment regarding any information needed for lands within the UGB study area, discussion of the process and sequencing for UGB amendment decisions by the Local Government and County, and the process for department review of the UGB amendment if required by OAR 660-024-0080.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- A copy of relevant building permit, development, land inventory, and public facilities data or documents needed to support the UGB amendment.

Task 2: Land Efficiency Measures

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant shall use information from the HCA to determine the housing capacity of remaining lands within the UGB, consistent with ORS 197A.350. If more than a year has passed since the HCA was developed, the Local Government may supplement analysis from the HCA with more recent development trend and density data to inform the calculation of land use needs.

The Local Government is required to adopt land use efficiency measures concurrent with or prior to expanding the UGB and to demonstrate that the need identified in the HCA cannot reasonably be accommodated on land within the UGB. With consideration of the needs and potential actions identified in the HCA, the Consultant will identify past measures adopted and develop and refine policy measures that use residential land more efficiently and facilitate housing production, affordability, and choice, including actions that:

- A) Increase housing diversity, efficiency and affordability, including new construction and the preservation of naturally occurring affordable housing;
- B) Allow greater housing choice for households and greater flexibility in location, type and density;
- C) Reduce cost or delay and increase procedural certainty for the production of housing; or
- D) Prepare land for development or redevelopment, including:
 - i) Public facilities planning and other investment strategies that increase the readiness of land for development for housing production;
 - ii) Site preparation, financial incentives or other incentive-based measures that increase the likelihood of development or redevelopment of land; or
 - iii) The redevelopment of underutilized commercial and employment lands for housing or a mix of housing and commercial uses;

The Consultant will develop adoption-ready policy measures based on discussion with the Local Government staff and decision-makers under Task 4. The Consultant will draft findings demonstrating that the adopted efficiency measures support the UGB amendment, including an estimation of land use efficiency resulting from adoption of identified measures.

Task 2 Consultant Deliverables:

- Draft policy measures
- Hearings-ready policy measures
- Findings demonstrating that the adopted efficiency measures support the UGB amendment proposal

Task 2 Local Government Deliverable:

- Review of draft policy measures

Task 3: UGB Alternatives Analysis

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will prepare a UGB alternatives analysis and findings report, consistent with Goal 14, ORS 197A.285, and OAR Chapter 660, Divisions 021 (if the establishment of urban reserves is contemplated as well) and 024. The analysis will define the preliminary study area (197A.285 and OAR 660-024-0065), and prioritize the following lands for inclusion in a UGB:

- a. Designated urban reserves
- b. Acknowledged exceptions and nonresource lands
- c. Marginal lands under ORS 197.247 (1991 Edition)
- d. Land that is not predominately high-value farmland as defined in ORS 195.300
- e. Land that is predominately high-value farmland as defined in ORS 195.300

Within the preliminary study area, the Consultant will identify smaller subareas and complete a review of lands consistent with the relevant state policies (OAR 660-024-0067). In general, this includes evaluation based on the following characteristics: existing urban reserves, exception lands, soil classes, constraints (e.g., floodway or wetlands), lot sizes, and other characteristics. This will include an evaluation of Goal 14 locational factors for lands within the same prioritization category, which are:

1. Efficient accommodation of identified land needs;
2. Orderly and economical provision of public facilities and services;
3. Comparative environmental, energy, economic and social consequences; and
4. Compatibility of the proposed urban uses with nearby agricultural and forest activities occurring on farm and forest land outside the UGB.

The Consultant will work with the Local Government staff and other interested parties (identified by the Local Government staff) to develop this analysis. Based on this alternatives analysis, the Consultant will develop findings to support the UGB amendment proposal, to present at a public work session with Planning Commission and City Council.

Task 3 Consultant Deliverables:

- Memorandum presenting the alternatives analysis maps and overview of the analysis
- Memorandum that identifies Comprehensive Plan policy recommendations that resulted from the UGB Analysis

Task 3 Local Government Deliverables:

- Meeting notices, agendas, and minutes

Task 4: Public Work Sessions and Hearings

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will hold four meetings with the Local Government's Planning Commission and City Council, including:

- One public work session with the Planning Commission to discuss and answer questions about the proposed UGB amendment;
- One public work session with the City Council to discuss and answer questions about the proposed UGB amendment;
- One hearing with the Planning Commission about the proposed UGB amendment; and
- One hearing with the City Council about the proposed UGB amendment.

The Consultant will hold two meetings with the County Planning Commission and Board of Commissioners, including:

- One hearing with the Planning Commission about the proposed UGB amendment; and
- One hearing with the Board of County Commissioners about the proposed UGB amendment.

The Consultant will develop staff reports and meeting materials, with guidance from Local Government staff, for each meeting with Planning Commission, City Council, or County Board of Commissioners.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 4 Consultant Deliverables:

- Staff reports and meeting materials for all public work sessions and hearings
- Draft and final findings for City Council and County Commission decisions to approve the land exchange

Task 4 Local Government Deliverable:

- Public work session and hearing notices and agendas

Urban Reserves Sample Work Program

Project Purpose: The purpose of this Project is to establish Urban Reserves as provided in OAR Chapter 660, Division 021 to plan for up to 50-years of projected growth and facilitate timely and efficient UGB amendments where a need is identified. Urban reserves identify additional areas beyond the current UGB that would be first priority for inclusion in a future UGB expansion. Urban reserves may accommodate land needs anticipated for up to fifty years. Urban reserves may be established before, concurrently with, or following UGB expansions.

Task 1: Project Kick-Off

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with the Local Government's specific concerns. The Consultant will verify the action items identified through this initial conference call with the Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant and the Local Government shall coordinate with the County and any applicable special district staff on the urban reserve decision regarding any information needed for lands within the urban reserve study area, discussion of the process and sequencing for urban reserve decisions by the Local Government and County, interim planning and zoning for urban reserve areas and development of an urban reserve agreement consistent with OAR 660-021, and the process for department review of the urban reserve decision, as provided in ORS 197.626.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- A copy of relevant building permit, development, and public facilities data or documents needed to support establishment of urban reserves.

Task 2: Land Need Projection

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

Urban reserves may either be established for up to 30 years after the 20-year period for which the Local Government has inventoried buildable lands **or** for a 40- to 50-year period after urban reserve adoption. If the Local Government **has** inventoried land as part of an HCA and Economic Opportunities Analysis, the Consultant will prepare up to a 30-year needs projection necessary for the urban reserve designation. If the city **has not** inventoried land as part of an HCA, the Consultant will prepare a 40 to 50-year needs projection necessary for the urban reserve determination.

For both paths, the Consultant will prepare the following:

- A **forecast of residential growth** for the planning period based on the applicable population projection and assumptions about future housing mix and density based on past development and market trends, consistent with applicable administrative rules including OAR Chapter 660, Division 008.
- A **forecast of employment growth** for the planning period based on a review of market trends and factors that may affect the Local Government's economic opportunities, in consideration of the "safe harbor" methodologies described in OAR 660-024-0040 (9).
- An **assessment of public and semi-public land need** for the planning period, including parks, community assets (e.g. libraries, places of worship, communal gathering spaces, etc.), schools, and public facilities.
- (If needed) an **estimate of buildable lands** within the Local Government UGB that can accommodate forecasted growth, consistent with applicable administrative rules including OAR Chapter 660, Division 024.
- A **determination of the amount and type of land needed** to accommodate the forecast for both residential and employment growth, consistent with applicable administrative rules including OAR Chapter 660, Division 021.

Task 2 Consultant Deliverables:

- Memorandum summarizing the land need projection necessary for the urban reserve designation.

Task 2 Local Government Deliverables:

- Relevant Local Government data needed to inform need forecasts and land need, including permitting data, public facilities information, and any relevant documents or analyses.

Task 3: Urban Reserves Determination

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will prepare an urban reserves alternative analysis and findings report, consistent with Goal 14, ORS 197A.285, and OAR Chapter 660, Division 021. The analysis will define areas for potential inclusion within urban reserves and prioritize lands for inclusion consistent with OAR 660-021-0030. The Consultant will complete a review of lands consistent with the relevant state policies (OAR 660-021). This will include an evaluation of Goal 14 locational factors, which are:

1. Efficient accommodation of identified land needs;
2. Orderly and economical provision of public facilities and services;
3. Comparative environmental, energy, economic and social consequences; and
4. Compatibility of the proposed urban uses with nearby agricultural and forest activities occurring on farm and forest land outside the UGB.

The Consultant will work with Local Government staff and other interested parties (identified by Local Government staff) to develop this analysis. Based on this alternatives analysis, Consultant will develop findings to support the urban reserves proposal, to present at a public work session with Planning Commission and City Council.

Task 3 Consultant Deliverables:

- Memorandum presenting the alternatives analysis maps and overview of the analysis
- Memorandum that identifies Comprehensive Plan policy recommendations that resulted from the UGB Analysis

Task 3 Local Government Deliverables:

- Meeting notices, agendas, and minutes

Task 4: Urban Reserve Agreements

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

Urban reserve planning must include agreements among Local Governments, Counties, and Special Districts about the adoption and maintenance of urban reserves. The Consultant will support the Local Government in developing urban reserve agreements among the Local Governments, Counties and Special Districts serving or projected to serve the designated urban reserves. This agreement or agreements will outline:

- (1) Designation of the Local Government responsible for building code administration and land use regulation in the urban reserves, both at the time of reserve designation and upon inclusion of these reserves within the urban growth boundary.
- (2) Designation of the Local Government or special District responsible for the following services: sewer, water, fire protection, parks, transportation, and storm water. The agreement shall include maps indicating areas and levels of current rural service responsibility and areas projected for future urban service responsibility when included in the urban growth boundary.
- (3) Terms and conditions under which service responsibility will be transferred or expanded for areas where the provider of the service is expected to change over time.
- (4) Procedures for notification and review of land use actions to ensure involvement by all affected Local governments and Special Districts.

Task 4 Consultant Deliverables:

- Meeting facilitation of relevant cities, counties, and service districts, including a summarizing memorandum
- Supporting maps, exhibits, and analysis to support the adoption-ready agreement

Task 4 Local Government Deliverable:

- An adoption-ready agreement among relevant Local Governments, Counties, and Special Districts outlining the responsibilities of each entity in the adoption and maintenance of urban reserves

Task 5: Adoption

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will hold four meetings with the Local Government's Planning Commission and City Council, including:

- One public work session with the Planning Commission to discuss and answer questions about the proposed urban reserves;
- One public work session with the City Council to discuss and answer questions about the proposed urban reserves;
- One hearing with the Planning Commission about the proposed urban reserves; and
- One hearing with the City Council about the proposed urban reserves.

The Consultant will hold two meetings with the County Planning Commission and Board of Commissioners, including:

- One hearing with the Planning Commission about the proposed urban reserves; and
- One hearing with the Board of County Commissioners about the proposed urban reserves.

The Consultant will develop staff reports and meeting materials, with guidance from Local Government staff, for each meeting with Planning Commission, City Council, or County Board of Commissioners.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 5 Consultant Deliverables:

- Staff reports and meeting materials for all public work sessions and hearings
- Draft and final findings report to support urban reserve adoption

Task 5 Local Government Deliverable:

- Public work session and hearing notices and agendas

Concept Area & Development Readiness Plan Sample Work Program

(This can be referred to as a Public Facilities Area Plan)

Project Purpose: The purpose of this Project is to prepare an area plan to enable and facilitate annexation and/or future development within an identified project area. This plan will identify local policies and investments, including sufficient infrastructure and public facilities, needed to support the development of a diversity of housing types, affordability, and accessibility features within the project area, and affords equitable access to opportunity, especially for protected classes, including community assets and employment needed to support future residents.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with the Local Government's specific concerns. The Consultant will verify the action items identified through this initial conference call with the Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- A copy of relevant planning documents and building permit, development, and public facilities data or documents needed to support the plan.
- Identification and coordination with any special districts located within the subject area.

Task 2: Existing Conditions and Maps

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

This task will create a baseline of information to be used throughout the project. Existing conditions maps will be prepared by the Consultant team, with data provided by the Local Government. The final map set will be tailored to the availability of data; map topics and information will be finalized in consultation with the Local Government. The existing conditions maps and analysis will be formatted into presentation slides, presentation boards, and an Existing Conditions Compilation Report.

The Consultant shall identify all statewide planning goals that may apply within the subject area, and shall identify existing data sources and any future work necessary to address all applicable statewide planning goals prior to urbanization. The Consultant shall identify how lands within the study area may be annexed into the Local Government in the future, consistent with OAR 660-014-0060 or with OAR 660-014-0070.

The Consultant will prepare a Market Analysis and Land Use Report for the Area Plan. The Program will identify market support for various land uses allowed by the adopted plan designations. The Program will also identify desired land uses as specified by Local Government policies (e.g. policies for affordable housing, policies related to economic opportunities). This work is intended to help refine the land uses, communicate to the community examples of uses being planned for, and guide the work in subsequent tasks. The report will also inform future discussions of mixes of uses in the area. The market analysis will evaluate market support in relation to future time periods (e.g. near term 0-5 years, mid-term 5-10 years, long term 10-20 years). The Consultant will prepare a one-page handout that summarizes key market analysis findings and land uses.

Task 2 Consultant Deliverables:

- Existing conditions maps and analysis, including:
 - Existing physical conditions (e.g. topography, natural features, structures, trees/vegetation, rock outcrops, etc.)
 - Any known natural hazard areas
 - Existing infrastructure and public facilities networks (e.g. transportation, water, wastewater, stormwater)
 - Existing parks and open spaces
 - A GIS-based Buildable Lands Inventory (BLI) (base data year to be determined in consultation with the Local Government); the Local Government will provide a recently developed BLI database if available, the Consultant will review and update as needed for the Area Plan or develop a BLI if not available.
 - Landscape and citywide context map
 - Any local walksheds, bike-sheds, and transit routes
- Market Analysis and Land Use Report, including recommendations and a one-page handout summarizing key market analysis findings and land uses.

Task 2 Local Government Deliverables:

- Memorandum summarizing applicable plans and programs, and any relevant data needed for the preparation of consultant deliverables, including:
 - Applicable Comprehensive Plan designations and policies, including specific requirements and guidance to the Area Plan

- Applicable park, trail, and school plans
- Planned infrastructure improvements and capacity, including water and sewer
- Planned transportation improvements and capacity, including for walking, biking, transit, and automobiles
- Other applicable plans

Task 3: Community Engagement and Visioning

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Local Government and the Consultant will identify and facilitate engagement with interested parties including relevant community and advocacy organizations and housing developers. The Local Government and the Consultant will solicit input from interested parties to:

- Provide meaningful ways to participate, tailored to interested parties' interests;
- Engage input from interested parties and reflect it in the plan;
- Build support for the Area Plan; and
- Plan and conduct productive public meetings.

The Local Government will schedule, and provide notices and an agendas, for any needed advisory committee (AC) meeting to review relevant project materials and advise the Local Government. The Consultant will coordinate with the Local Government on meeting arrangements and facilitate advisory committee meetings. The advisory committee may consider more than one deliverable at a meeting.

Task 3 Consultant Deliverables:

- Meeting materials to the advisory committee, the public, and interested parties
- Advisory committee meeting summary or summaries
- Community engagement summary or summaries

Task 3 Local Government Deliverable:

- Meeting notices, agendas, and relevant materials to the advisory committee, the public, and interested parties

Task 4: Area Plan Concepts and Refinement

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

Based on feedback from the community, the Consultant will prepare refined land use and transportation concept maps for the area. The concept will be the first draft of a proposed "plan" for the area and will be used for infrastructure analysis. Additionally, the Consultant will develop a

transportation analysis required for demonstrating compliance with the Transportation Planning Rule, OAR 660-012 and an infrastructure analysis to identify projects that will be evaluated in the Infrastructure Funding Plan in Task 5.

For the transportation analysis, the Consultant will participate in a methodology meeting with ODOT to determine the analysis method, including the size and geographic boundaries of the impact area to be evaluated. The Consultant will prepare a draft methodology memo for use in advisory committee meetings and will refine the memo in response to advisory committee feedback. The Local Government will lead the coordination with ODOT on approval of the methodology. To the extent practicable, the Consultant will utilize modeling, data, and project costs prepared as part of the TSP project, recognizing modeling will rely on plan designations and metrics based on the plan designations currently assigned to properties in the Plan Area, and transportation facilities identified during the TSP process. The plan will include recommendations for motor vehicle, bicycle, and pedestrian projects to meet future needs. Based on this transportation analysis, the Consultant will prepare a final technical memorandum that documents the results of the modeling for the Project Area, organized to support compliance findings with the Transportation Planning Rule at OAR 660 - 012. The Local Government will create findings for compliance with applicable goals, statutes, and administrative rules.

For the infrastructure analysis, the Local Government will facilitate reviews of the refined concept by service providers for water, stormwater, sanitary sewer, parks, and schools, with technical and meeting support from the Consultant. The Local Government will obtain cost estimates from relevant service providers, including correspondence, notice, and comments to relevant service providers. The Consultant will prepare a memorandum describing and illustrating planning-level facilities for water, stormwater, sanitary sewer, parks, and schools, with cost estimates. Based on the infrastructure analyses and service provider input, the Consultant will prepare a document for public review, including graphics to illustrate the proposed plan and its implementation.

Task 4 Consultant Deliverables:

- Refined transportation and land use concept map, supporting GIS data, and metrics for use in infrastructure analysis
- Transportation analysis demonstrating TPR compliance
- Infrastructure analysis with relevant cost estimates for water, stormwater, sanitary sewer, parks, and schools.
- Public review drafts and illustrations

Task 4 Local Government Deliverable:

- Meeting invitations and materials to relevant state agencies, service providers, and advisory committees

Task 5: Adoption-Ready Concept Plan

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-

provided consultant]

The Consultant will prepare an Area Plan summary report. This report is intended as a non-technical plan summary for use by a broad audience, from the general public to the City Council. The Consultant will prepare both a physical and online report with concise narrative and graphics. The report will also include a Technical Appendix for the summary report, which will include all relevant technical memoranda.

The Consultant will lead a work session with the Local Government staff to discuss potential Comprehensive Plan amendments and policies to implement the Area Plan, including evaluation of existing or special plan area comp plan and zoning designations and standards governing the development of land within the project area. Based on the work in Task 4, the Consultant will identify the specific TSP amendments that are required to implement the Area Plan. Those amendments will be adopted either as “stand alone” amendments, or combined with the larger legislative update of the TSP. The Consultant will prepare a memo describing the approach and outline to be used for the zoning implementation. If the approach includes development of a special plan district, the Local Government will draft the code following the approach and outline included in the memo.

The Consultant will prepare an infrastructure funding plan, including water, stormwater, sanitary sewer, parks, schools, and transportation. The Local Government will provide policy guidance and finance staff participation during preparation of the funding plan. The Consultant will conduct a funding gap analysis to identify and estimate any infrastructure funding gaps and potential funding sources to address those gaps. Following the funding analysis, the Consultant will prepare the funding plan. The funding plan is a unique element of the Area Plan that will be focused on the technical and policy implications of infrastructure funding, in consultation with Local Government staff and decision-makers.

The Consultant will package the Comprehensive Plan amendments, TSP amendments, zoning implementation, Comprehensive Plan Map designations, and Infrastructure Funding Plan into an Implementation Memo. The Memo will include a description of the strategy for who is responsible for building needed infrastructure and what are the intended triggers for planned infrastructure improvements.

Task 5 Consultant Deliverables:

- Area Plan summary report and technical appendix
- Comprehensive plan and zoning amendments, including relevant GIS dataset showing final comp plan designations and needed Transportation System Plan amendments
- Infrastructure funding plan, including gap analysis and potential funding sources
- Implementation Memo summarizing the above deliverables.

Task 5 Local Government Deliverables:

- If needed, development code amendments to implement a special plan designation
- Meeting notices, agendas, and relevant materials.

Task 6: Adoption (if applicable)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Local Government will schedule and provide notice and an agenda for hearings to adopt the Concept Area & Development-Readiness Plan. The Consultant will coordinate with the Local Government on hearing arrangements and present updates to the hearings body or bodies.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 6 Consultant Deliverable:

- Presentation materials to explain final draft updates to the hearings body or bodies

Task 6 Local Government Deliverables:

- Hearings notices, agendas, and minutes

SB 1537 Small (UGB) Expansion Sample Work Program

*****Please note that, to qualify for funding, a UGB amendment made under SB 1537 (2024) requires an identified residential land need and an affordable housing need, per Section 52 of the bill. This work program assumes that need has already been identified and eligibility confirmed.*****

Project Purpose: The purpose of this Project is to prepare all materials and support processes necessary to amend a city Urban Growth Boundary (UGB) as provided in SB 1537 (2024), Section 56.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with city-specific concerns and bill language. The Consultant will verify the action items identified through this initial conference call with the Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant and the Local Government shall coordinate with County staff regarding the UGB amendment, and any information needed for lands within the UGB, discussion of the process and sequencing for UGB amendment decisions by the Local Government and County, and the process for Department review of the UGB amendment as required by Section 57 of the bill.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- A copy of relevant land inventory, mapping, zoning, and recent development of lands within the UGB and county zoning for land adjacent to the UGB.

Task 2: Preliminary Analysis and Solicitation of Applications

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant shall use information and data from the most current mapping of the UGB, adopted Housing Capacity Analysis (HCA) report, mapping and zoning of County lands adjacent to the UGB and any other information used to determine the city's need and eligibility under Section 52 (1) and (2). The Local Governments should utilize and provide the most current data available.

The Local Government is required to enter into enforceable and recordable agreements with each land owner of a property selected for addition to the UGB to ensure compliance with the affordability requirements in Section 55(3)(f). In addition, binding agreements with each property owner within the site and any necessary public or private utilities, local government and districts, as defined by ORS 195.060 to ensure all necessary urban services will be provided as defined in ORS 195.065.

Notice of the Local Government's intent to solicit applications must be provided to each County in which the Local Government resides and each Special District providing urban services within the Local Government's UGB.

The Consultant will provide an analysis of lands adjacent to the UGB eligible for addition to the Local Government's UGB per Section 50 (1)(b) for local governments outside of Metro, and Section 51(1) for cities within Metro.

Task 2 Consultant Deliverables:

- a. Analysis of eligible land adjacent to the city's UGB, per the specified criteria:
 - For local governments within Metro, and outside of Metro: land designated as an urban reserve
 - For local governments outside of Metro: land designated as nonresource land
 - For local governments outside of Metro: land subject to an acknowledged exception
- b. Public notice of the Local Government's intention to select a site for inclusion within the UGB that includes:
 - The Local Government's intention to select a site
 - Each basis under which the Local Government has determined that it qualifies under the eligibility criteria in Section 52
 - A deadline for submission of applications
 - A description of the information, form and format required of an application.

Task 2 Local Government Deliverable:

- Analysis for determining eligibility under both housing and land need criteria
- Zoning data and mapped information for adjacent land to the Local Government's UGB
- Post and distribute the notice for solicitation of applications for addition to the Local Government's UGB

Task 3: Review of Applications and Consultation with Stakeholders

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

After the deadline for submission of applications the Consultant will review each completed application for compliance with relevant sections 49 to 59 of the bill. For each application that complies with the bill's requirements, notice will be provided to the residents of the proposed site area who were not signatories to the application. In addition, opportunities for public participation shall be provided from the options in Section 54 (1)(c) and consultation with those parties listed under Section 54(1)(d) shall be completed with the opportunity for these parties to provide written comment.

Task 3 Consultant Deliverables:

- Review applications filed for compliance with sections 49 to 59 of the bill
- Provide opportunities for public participation in selecting a site
- Consult with and provide opportunity for public comment from those parties listed in Sec. 54 (1)(d)(A)-(D)

Task 3 Local Government Deliverables:

- Notice on the city's website or published in a paper of record
- Provide public meeting notices, agendas, and minutes

Task 4: Selection of a site

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will hold up to three meetings with the Local Government's Planning Commission and/or City Council, including at least:

- One meeting of the city's planning commission;
- One meeting of the city's council; or
- One public open house; and
- One public comment period

Notice of opportunities for public participation must be provided on the Local Government's website or published in a paper of record at least 14 days prior to the beginning of the comment period and prior to the date of the meeting at which public testimony is considered.

The Consultant will develop staff reports and meeting materials, with guidance from Local Government staff, for each meeting with Planning Commission, City Council, or County Board of Commissioners.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 4 Consultant Deliverables:

- Staff reports and meeting materials for all public meetings and hearings
- Draft and final findings for City Council and County Commission decisions to approve the UGB amendment

Task 4 Local Government Deliverable:

- Schedule public meetings, work sessions, and hearing notices and agendas

SB 1537 (UGB) Addition Sample Work Program

*****Please note that, to qualify for funding, a UGB amendment made under SB 1537 requires an identified residential land need and an affordable housing need, per Section 52 of the bill. This work program assumes that need has already been identified and eligibility confirmed.*****

Project Purpose: The purpose of this Project is to prepare all materials and support processes necessary to amend a city Urban Growth Boundary (UGB) as provided in SB 1537, Section 50 or Section 51 as applicable.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with city-specific concerns and bill language. The Consultant will verify the action items identified through this initial conference call with the Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant and the Local Government shall coordinate with County staff regarding the UGB amendment and any information needed for lands within the UGB, discussion of the process and sequencing for UGB amendment decisions by the Local Government and County, and the process for Department review of the UGB amendment as required by Section 57 of the bill.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- A copy of relevant land inventory, mapping, zoning, and recent development of lands within the UGB and county zoning for land adjacent to the UGB.

Task 2: Preliminary Analysis and Solicitation of Applications

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant shall use information and data from the most current mapping of the UGB, adopted HCA report, mapping and zoning of county lands adjacent to the UGB and any other information used to determine the city's need and eligibility under Section 52 (1) and (2). Local Governments should utilize and provide the most current data available.

The Local Government is required to enter into enforceable and recordable agreements with each land owner of a property selected for addition to the UGB to ensure compliance with the affordability requirements in Section 55(3)(f). In addition, binding agreements with each property owner within the site and any necessary public or private utilities, local government and districts, as defined by ORS 195.060 to ensure all necessary urban services will be provided as defined in ORS 195.065.

Notice of the Local Government's intent to solicit applications must be provided to each County in which the Local Government resides and each Special District providing urban services within the Local Government's UGB.

The Consultant will provide an analysis of lands adjacent to the UGB eligible for addition to the Local Government's UGB per Section 50 (1)(b) for cities outside of Metro, and Section 51(1) for local governments within Metro.

Task 2 Consultant Deliverables:

- c. Analysis of eligible land adjacent to the Local Government's UGB, per the criteria
 - For local governments within Metro, and outside of Metro: land designated as an urban reserve
 - For local governments outside of Metro: land designated as nonresource land
 - For local governments outside of Metro: land subject to an acknowledged exception
- d. Prepare public notice of the Local Government's intention to select a site for inclusion within the UGB that includes:
 - The Local Government's intention to select a site
 - Each basis under which the Local Government has determined that it qualifies under the eligibility criteria in Section 52
 - A deadline for submission of applications
 - A description of the information, form and format required of an application

Task 2 Local Government Deliverable:

- Share analysis for determining eligibility under both housing and land need criteria
- Provide zoning data and mapped information for adjacent land to the Local Government's UGB
- Post and distribute the notice for solicitation of applications for addition to the Local Government's UGB

Task 3: Review of Applications and Consultation with Interested Parties

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

After the deadline for submission of applications the Consultant will review each completed application for compliance with relevant sections 49 to 59 of the bill. For each application that complies with the bill's requirements, notice will be provided to the residents of the proposed site area who were not signatories to the application. In addition, opportunities for public participation shall be provided from the options in Section 54 (1)(c) and consultation with those parties listed under Section 54(1)(d) shall be completed with the opportunity for these parties to provide written comment.

Task 3 Consultant Deliverables:

- Review applications filed for compliance with sections 49 to 59 of the bill
- Provide opportunities for public participation in selecting a site
- Consult with and provide opportunity for public comment from those parties listed in Sec. 54 (1)(d)(A)-(D)

Task 3 Local Government Deliverables:

- Notice on the city's website or published in a paper of record
- Provide public meeting notices, agendas, and minutes

Task 4: Selection of a site

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will hold three meetings with the Local Government's Planning Commission and/or City Council, including at least:

- One meeting of the Local Government's Planning Commission;
- One meeting of the Local Government's City Council; or
- One public open house; and
- One public comment period

Notice of opportunities for public participation must be provided on the Local Government's website or published in a paper of record at least 14 days prior to the beginning of the comment period and prior to the date of the meeting at which public testimony is considered.

The Consultant will develop staff reports and meeting materials, with guidance from Local Government staff, for each meeting with Planning Commission, City Council, or County Board of

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Commissioners.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 4 Consultant Deliverables:

- Staff reports and meeting materials for all public meetings and hearings
- Draft and final findings for City Council and County Commission decisions to approve the UGB amendment

Task 4 Local Government Deliverable:

- Schedule public meetings, work sessions, and hearing notices and agendas

Task 5: Conceptual Plan

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

Before adopting a UGB amendment under Section 50 of SB 1537, the Local Government shall adopt a binding conceptual plan as an amendment to its comprehensive plan. The Consultant will hold four meetings with property owners, their representatives, and Local Government staff, to complete a conceptual plan per the requirements under Section 55 (3):

- Establish total net residential acres;
- Provide a diversity of housing types;
- Zone the site for residential or mixed-use; and
- Meet the density requirement of Sec. 55(3)(a)(C)
- At least 30 percent of residential units must be subject to affordability restrictions.
- Designate within the site: recreation and open spaces, commercial uses, and
- If applicable, include a transportation network that provides diverse options
- Demonstrate that protective measures are applied consistent with statewide land use planning goals
- Included binding agreements with each property owner and service providers to ensure all necessary urban services

The Consultant will hold three additional meetings with the Planning Commission, City Council, or County Board of Commissioners to present the Conceptual Plan, including:

- One hearing with the City Council about the proposed UGB amendment and the conceptual plan; and
- One hearing with the Board of County Commissioners about the proposed UGB amendment.

The Consultant will develop staff reports and meeting materials, with guidance from Local

Government staff, for each meeting with Planning Commission, City Council, or County Board of Commissioners.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 4 Consultant Deliverables:

- Staff reports and meeting materials for all meetings and hearings
- Draft and final findings for City Council and County Commission decisions to approve the UGB amendment.
- Two drafts of the Conceptual Plan for review and one final Conceptual Plan for local adoption.

Task 4 Local Government Deliverable:

- Public meetings and hearing notices and agendas.

Senate Bill 1537 (UGB) Land Exchange Sample Work Program

*****Please note that, to qualify for funding, a UGB amendment made under SB 1537 requires an identified residential land need and an affordable housing need, per Section 52 of the bill. This work program assumes that need has already been identified and eligibility confirmed.*****

Project Purpose: The purpose of this Project is to prepare all materials and support processes necessary for an Urban Growth Boundary (UGB) exchange as provided in SB 1537, Section 58.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The purpose of the project kick-off is for the Consultant to become familiar with local conditions and with the Local Government's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the Local Government to prepare for the Project. The Consultant will contact the Local Government via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with the Local Government's specific concerns and bill language. The Consultant will verify the action items identified through this initial conference call with the Local Government and will develop and share a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed project schedule should be determined by mutual agreement by the Local Government and the Consultant.

The Consultant and Local Government shall coordinate with County staff regarding the UGB land exchange regarding any information needed for lands within the UGB, discussion of the process and sequencing for UGB amendment decisions by the Local Government and County, determination of the County zoning to be applied to lands removed from the UGB, and the process for department review of the UGB amendment as required by Section 57 of the bill.

The Consultant will have [monthly/biweekly] check-ins with the Local Government to discuss major project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

- Summary of major tasks and action items for the Project
- Proposed Project schedule

Task 1 Local Government Deliverables:

- A copy of relevant land inventory, mapping, zoning of lands within the UGB and county zoning for land adjacent to the UGB.

Task 2: Preliminary UGB Analysis

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The process for a UGB land exchange under SB 1537 is significantly different from that of the UGB expansion using the bill's provisions. Sections 57 and 58 describes the process and requirements for this. The process requires removing land from the UGB as well as adding land to take its place. The proposal must demonstrate compliance with Sections 50 (1)(a)-(c), 51, and 57.

The Consultant will prepare a UGB alternatives analysis and findings report, consistent with Goal 14 and statewide land use planning goals. The analysis will assess lands within the UGB and adjacent to the UGB for exchange. Land considered for addition to the UGB must be:

- For local governments within Metro, and outside of Metro: land designated as an urban reserve
- For local governments outside of Metro: land designated as nonresource land
- For local governments outside of Metro: land subject to an acknowledged exception

The Consultant will work with Local Government staff and other interested parties (identified by Local Government staff) to develop this analysis. Based on this alternatives analysis, the Consultant will develop findings to support the UGB land exchange proposal, to present at a public work session with Planning Commission and/or City Council.

Task 2 Consultant Deliverables:

- Memorandum presenting the alternatives analysis maps and overview of the analysis
- Memorandum that identifies necessary Comprehensive Plan updates that resulted from the UGB land exchange analysis

Task 2 Local Government Deliverables:

- Meeting notices, agendas, and minutes

Task 3: Public Work Sessions and Hearings

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only; do not provide an estimate if requesting a DLCD-provided consultant]

The Consultant will hold four meetings with the Local Government's Planning Commission and City Council, including:

- One public work session with the Planning Commission to discuss and answer questions about the proposed UGB land exchange;
- One public work session with the City Council to discuss and answer questions about the proposed UGB land exchange;
- One hearing with the Planning Commission to consider the proposed UGB land exchange; and

- One hearing with the City Council to consider the proposed UGB land exchange.

The Consultant will hold two meetings with the County Planning Commission and Board of Commissioners, including:

- One hearing with the Planning Commission to consider the proposed UGB land exchange; and
- One hearing with the Board of County Commissioners to consider the proposed UGB land exchange.

The Consultant will develop staff reports and meeting materials, with guidance from Local Government staff, for each meeting with Planning Commission, City Council, or County Board of Commissioners.

Please note: Adoption of the hearings-ready work product is not required for this task. The deliverables below are sufficient to demonstrate substantial completion of this task.

Task 3 Consultant Deliverables:

- Staff reports and meeting materials for all public work sessions and hearings
- Draft and final findings for City Council and County Commission decisions to approve the land exchange

Task 3 Local Government Deliverable:

- Public work session and hearing notices and agendas