



Department of Land Conservation and Development

2023-25 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 samples 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.

Housing Planning Assistance – Sample Work Programs

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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-related statutes and facilitate housing production, affordability, and choice.

Task 1: Project Kick-Off and Management

Timeline: DATE – DATE

Estimated Cost: [Direct Grants only]

The purpose of the project kick-off is for Consultant to become familiar with local conditions and with 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. Consultant will contact Local Government via conference call, or in person, to inquire about establishing project expectations and familiarizing themselves with city-specific 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.

Consultant will have [monthly/biweekly] check-ins with the City 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 City data or documents

Task 2: Code Audit and Code Concepts

Estimated Cost: [Direct Grants only]

Timeline: DATE - DATE

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 (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 stymie production.

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

(If the project includes public engagement) 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. Local Government will solicit input from the public on proposed code concepts. Consultant will coordinate with Local Government on meeting arrangements and facilitate the public meeting(s).

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

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)

Task 3: Draft Code Update

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

After review of the findings and recommendations of the code review with the advisory committee at the first committee meeting, 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.

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

Task 4: Final Code Update

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

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.

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

Task 5: 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 updates to

the Local Government's zoning ordinance, other development codes (if any), and comprehensive plan (if required). 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 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 197.296 or 197.297. City adoption of the analysis or comprehensive plan amendments are not required prior to project completion on or before June 30, 2025.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

The purpose of the project kick-off is for Consultant to become familiar with local conditions and with City's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the City to prepare for the Project. Consultant will contact City via conference call, or in person to inquire about establishing project expectations and familiarize themselves with city-specific concerns. Consultant will verify the action items identified through this initial conference call with the participating City 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 City and the Consultant.

Consultant will have [monthly/biweekly] check-ins with the City 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 City Deliverables:

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

Task 2: Housing Needs Projection

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Consultant will prepare a draft housing needs projection consistent with OAR chapter 660, divisions 7 or 8, as applicable. The housing needs projection will be used to determine the City's residential land need in Task 4. The housing needs projection will be developed based on discussion with a project advisory committee at one or more committee meetings.

City will schedule, and provide notice and an agenda, for one advisory committee (AC) meeting to review the draft housing needs projection product. Consultant will coordinate with City 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:

- Draft housing needs projection
- Presentation materials to explain preliminary analyses and findings to the advisory committee, the public, and interest groups (AC #1)
- Advisory committee meeting notes

Task 2 City Deliverables:

- Advisory committee appointments
- Advisory committee meeting notices and agendas

Task 3: Buildable Lands Inventory (BLI)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Consultant will prepare a draft inventory of buildable land consistent with OAR chapter 660, division 7 or 8, as applicable. The BLI will be used to determine the City'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.

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

City will schedule one public workshop or open house to present draft housing needs and buildable lands data and findings. City will solicit input from the public on the draft deliverables. Consultant will coordinate with City 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 (AC #2)
- Advisory committee meeting notes
- Public meeting summary

Task 3 City Deliverable:

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

Task 4: Residential Land Needs Analysis (RLNA)

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Based on the outcomes of Tasks 2 and 3, Consultant will prepare a draft RLNA that addresses how much land and what zoning the City 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 City's existing comprehensive plan, the RLNA will be developed concurrently with Task 5 in order to consider accommodating Housing Needs through changes to the comprehensive plan and land use regulations as required by OAR chapter 660, divisions 7 or 8 and 24.¹

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

Task 4 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 4 City Deliverable:

- Advisory committee meeting notices and agendas

Task 5: Measures to Accommodate Needed Housing

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Consultant will identify options for changes to the City'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 4.

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

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 HNA, per OAR 660-024-0050(4).

more than one deliverable at a meeting.

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

Task 5 Consultant Deliverables:

- Options for changes to City’s comprehensive plan and land use regulations to address housing and residential land needs
- Presentation materials to introduce housing accommodation recommendations to the advisory committee, the public, and interest groups (AC #4, AC #5 if needed)
- Advisory committee meeting notes
- Public meeting summary
- Final draft hearings-ready HNA

Task 5 City Deliverables:

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

Task 6: 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 Needs Analysis and associated updates to the Local Government’s comprehensive plan and development code. 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 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

Housing Production Strategy Sample Work Program

Project Purpose: The purpose of this Project is to prepare a Housing Production Strategy as described in ORS 197.290 and [OAR 660-008-0050](#) that outlines the actions a city plans to adopt to encourage the production of needed housing as identified in a Housing Capacity Analysis and promote housing production, affordability, and choice.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

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

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

City will complete required pre-housing production strategy survey on 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 City Deliverables:

- Copy of relevant comprehensive plan and code sections
- A copy of the pre-HPS survey, which includes a list of measures already adopted by the City that promote the development of needed housing
- Building permit and housing data to support the Project

Task 2: Contextualized Housing Need

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Data Collection and Analysis

Consultant will gather relevant data from the City's Consolidated Plan, Housing Capacity Analysis,

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Oregon Housing Needs Analysis, and other available sources as needed for the HPS to describe current and future housing needs in the context of population and market trends. The City will provide Consultant access to all relevant available local data. The analysis of contextualized housing needs will include:

- Socio-economic and demographic trends of a jurisdiction’s population, disaggregated by race to the extent possible with available data;
- Market conditions affecting the provision of needed housing;
- Existing and expected barriers to the development of needed housing;
- Housing need for those experiencing homelessness, using the best available data;
- Percentage of Rent Burdened Households;
- Housing by Tenure (owner vs renter);
- Percentage of housing stock that is market rate vs. subsidized; and
- Units that are in the development pipeline by housing type;

The analysis of contextualized housing needs will also draw on information gathered through engagement with housing consumers, including underrepresented communities.

Outreach and Engagement

Consultant will help plan engagement with housing consumers, including direct outreach to individuals through interviews, focus groups, or other means; contacting community-based organizations and service providers to connect with those they serve; and/or hosting events (virtual or in-person). This engagement will prioritize underrepresented communities within the City, including renters, low-income households, Hispanic/Latinx residents, other racial and ethnic minorities and immigrant or refugee communities, veterans, people with disabilities, seniors, agricultural workers, and formerly and currently homeless people. The engagement efforts will build from past engagement with the City’s [HOUSING-RELATED ENGAGEMENT WORK] and be coordinated with the event(s) required under HB4006 for severely rent burdened communities.

Consultant will help plan for the engagement, including helping to define the questions and topics for the outreach and methods to solicit input. City staff will connect Consultant with existing networks for engagement and facilitate discussion and engagement.

Summary Document

Following data analysis and synthesis of outreach, Consultant will produce a summary of contextualized housing needs. While this will initially be produced as a stand-alone memorandum, it will later become a section of the HPS. Consultant will present the draft to a future City’s Advisory Committee meeting and make it available for public comment.

Task 2 Consultant Deliverables:

- Outline of suggested questions and topics for outreach meeting with staff to plan for engagement with housing consumers and producers; and
- Contextualized Housing Needs memorandum.

Task 2 City Deliverables:

- List of existing groups and organizations for engagement.
- Meeting notices and agendas

Task 3: Strategies to Accommodate Future Housing Need

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Consultant will review and provide input to the City on a City-provided summary of measures already adopted by the City that promote the development of needed housing, and existing practices that affirmatively further fair housing, link housing to transportation, provide access in Opportunity Areas, address equitable distribution of services, and create opportunities for rental housing and homeownership as those terms and requirements are defined in the final rules and state guidance for the HPS. The City will identify and provide all available information about existing relevant measures.

For the strategies that are recommended for inclusion in the City’s HPS, Consultant will produce the following for each strategy, based on Consultant’s evaluation, input from staff, and feedback gathered through outreach and engagement:

- A description of the strategy;
- Identified Housing Need being fulfilled (tenure and income) and analysis of the income and demographic populations that will receive benefit and/or burden from the strategy, including low-income communities, communities of color, and other communities that have been discriminated against, according to fair housing laws;
- Approximate magnitude of impact, 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;
- Timeline for adoption and implementation;
- Actions necessary for the local government and other stakeholders to take in order to implement the strategy; and
- Opportunities, constraints, or negative externalities associated with adoption of the strategy.

Task 3 Consultant Deliverables:

- Memorandum summarizing existing measures, previously identified strategies, and additional strategies for consideration to address contextualized housing needs;
- Memorandum providing additional evaluation and refinement of selected strategies;
- Memorandum summarizing the information required per the list above for each strategy;
- Up to eight documented discussions with housing producers and/or service providers to seek input on the potential housing strategies;
- Agendas and presentations/meeting materials for up to three meetings (likely by videoconference) with the Advisory Committee; and

Task 3 City Deliverable:

- Meeting notices and agendas

Task 4: Draft and Final HPS Report

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

The draft HPS Report will include the following:

- Contextualized housing needs from Task 2;
- Summaries of existing measures and final proposed strategies from Task 3;
- How the City’s existing measures and final proposed strategies help to achieve fair and equitable housing outcomes, affirmatively further fair housing, and overcome discriminatory housing practices and racial segregation; and
- A conclusion addressing the following:
 - A qualitative assessment of how the strategies collectively address the contextualized housing needs identified in the HCA and HPS;
 - Discussion of how the proposed actions, taken collectively, will increase housing options for historically marginalized communities;
 - How the City’s existing measures and proposed strategies will affirmatively further fair housing, link housing to transportation, provide access to Opportunity, address needs for people facing homelessness and equitable distribution of services, create opportunities for rental housing and homeownership, and mitigate vulnerabilities to displacement and housing instability;
 - The rationale for any identified needs not being addressed; and
 - The City’s plan for monitoring progress on the housing production strategies.

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

Task 4 Consultant Deliverables:

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

Task 4 City Deliverable:

- Meeting notices and agendas

Task 5: 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 Production Strategy. 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 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 Needs Analysis nor 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 needs analysis nor housing production strategy.

Task 1: Project Kick-Off and Management

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

The purpose of the project kick-off is for Consultant to become familiar with local conditions and with City's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the City to prepare for the Project. Consultant will contact City via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with city-specific concerns. Consultant will verify the action items identified through this initial conference call with the City 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 City and the Consultant.

Consultant will have [monthly/biweekly] check-ins with the City 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 City Deliverables:

- Copy of relevant City data or documents

Task 2: Background Report

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Consultant will prepare a background report containing the following subjects:

- A summary of housing need within the City, including from the City’s most recent Housing Needs Analysis and other related planning documents.
- Past actions undertaken by the City to develop and/or implement strategies to meet housing need identified in their Housing Needs Analysis.
- Tools and strategies available to develop and implement a successful housing implementation plan.
- An analysis of opportunities and constraints for identified tools and strategies.

City and Consultant will identify and facilitate engagement with stakeholder groups including community and advocacy organizations and housing developers. City and Consultant will solicit input from stakeholders to identify tools and strategies needed to preserve existing and facilitate the development of new affordable housing options.

City will schedule, and provide notice and an agenda, for one advisory committee (AC) meeting to review the background report. Consultant will coordinate with City 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 analyses and findings to the advisory committee, the public, and interest groups (AC #1)
- Advisory committee meeting notes
- Community engagement meeting summary (summaries)

Task 2 City Deliverables:

- Identified stakeholder 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]

Consultant will prepare a draft housing implementation plan containing the following subjects:

- A description and analysis of strategies the City will take to promote the development of needed housing as identified in their Housing Needs Analysis.
- The draft housing implementation plan may also consider the following elements:
 - Any opportunities, constraints or negatives 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 stakeholders to take in order to implement the housing implementation plan

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

City will schedule a public workshop or open house to present the draft housing implementation plan. City will solicit input from the public on the draft deliverables. Consultant will coordinate with City 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 (AC #2)
- Advisory committee meeting notes
- Public meeting summary

Task 3 City 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]

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

City will schedule and provide notice and an agenda for one advisory committee meeting to review the hearings-ready ordinance, resolution, and/or final housing implementation plan, or similar product. Consultant will coordinate with City 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 (AC #3)
- Advisory committee meeting notes

Task 4 City 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.320 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]

The purpose of the project kick-off is for Consultant to become familiar with local conditions and with City's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the City to prepare for the Project. Consultant will contact City via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with city-specific concerns. Consultant will verify the action items identified through this initial conference call with the City 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 City and the Consultant.

Consultant and City shall coordinate with 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 City 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.

Consultant will have [monthly/biweekly] check-ins with the City 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 City 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]

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 City's most recently adopted Housing Capacity Analysis and Urban Reserves (where applicable).

Consultant will prepare a UGB alternatives analysis and findings report, consistent with Goal 14, ORS 179A.320, and OAR Chapter 660, Divisions 021 (where applicable) and 024. The analysis will define the preliminary study area (197A.320 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
- 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(2). For employment land exchanges "buildable lands" shall be consistent with applicable requirements in OAR 660-009.

Within the preliminary study area, 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.

Consultant will work with City staff and other stakeholders (identified by City staff) to develop this analysis. Based on this alternatives analysis, 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 City Deliverables:

- Meeting notices, agendas, and minutes

Task 3: Public Work Sessions and Hearings

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Consultant will hold up to four meetings with the City 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.

Consultant will hold up to 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.

Consultant will develop staff reports and meeting materials, with guidance from City 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 City 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 as provided in OAR Chapter 660, Division 024 to address an identified deficiency of lands to accommodate projected housing needs. A UGB Amendment occurs after a deficiency is identified in a Housing Capacity Analysis 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]

The purpose of the project kick-off is for Consultant to become familiar with local conditions and with City's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the City to prepare for the Project. Consultant will contact City via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with city-specific concerns. Consultant will verify the action items identified through this initial conference call with the City 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 City and the Consultant.

Consultant and City 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 City and County, and the process for department review of the UGB amendment if required by OAR 660-024-0080.

Consultant will have [monthly/biweekly] check-ins with the City 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 City 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]

Consultant shall use information from the housing capacity analysis to determine the housing capacity of remaining lands within the UGB, consistent with ORS 197.296. If more than a year has passed since the HCA was developed, City may supplement analysis from the HCA with more recent development trend and density data to inform the calculation of land use needs.

The City 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 Housing Capacity Analysis cannot reasonably be accommodated on land within the UGB. With consideration of the needs and potential actions identified in the Housing Capacity Analysis, 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;

Consultant will develop adoption-ready policy measures based on discussion with City staff and decision-makers under Task 4. 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 City Deliverable:

- Review of draft policy measures

Task 3: UGB Alternatives Analysis

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Consultant will prepare a UGB alternatives analysis and findings report, consistent with Goal 14, ORS 197A.320, 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.320 and OAR 660-024-0065), and prioritize the following lands for inclusion in a UGB:

- f. Designated urban reserves
- g. Acknowledged exceptions and nonresource lands
- h. Marginal lands under ORS 197.247
- i. Land that is not predominately high-value farmland as defined in ORS 195.300
- j. Land that is predominately high-value farmland as defined in ORS 195.300

Within the preliminary study area, 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:

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

Consultant will work with City staff and other stakeholders (identified by City staff) to develop this analysis. Based on this alternatives analysis, 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 City Deliverables:

- Meeting notices, agendas, and minutes

Task 4: Public Work Sessions and Hearings

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Consultant will hold up to four meetings with the City 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.

Consultant will hold up to 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.

Consultant will develop staff reports and meeting materials, with guidance from City 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 City 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]

The purpose of the project kick-off is for Consultant to become familiar with local conditions and with City's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the City to prepare for the Project. Consultant will contact City via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with city-specific concerns. Consultant will verify the action items identified through this initial conference call with the City 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 City and the Consultant.

Consultant and City shall coordinate with 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 City 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.

Consultant will have [monthly/biweekly] check-ins with the City 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 City 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]

Urban reserves may either be established for up to 30 years after the 20-year period for which a city has inventoried buildable lands **or** for a 40- to 50-year period after urban reserve adoption. If the city **has** inventoried land as part of a Housing Capacity Analysis 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 a Housing Capacity Analysis, 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 City’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 City’s 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 3 City Deliverables:

- Relevant city 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]

Consultant will prepare an urban reserves alternative analysis and findings report, consistent with Goal 14, ORS 197A.320, 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. 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.

Consultant will work with City staff and other stakeholders (identified by City 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 City Deliverables:

- Meeting notices, agendas, and minutes

Task 3 Consultant Deliverables:

- Text

Task 3 City Deliverables:

- Text

Task 4: Urban Reserve Agreements

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

Urban reserve planning must include agreements among cities, counties, and special districts about the adoption and maintenance of urban reserves. The Consultant will support the city in developing urban reserve agreements among cities, 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 City Deliverable:

- An adoption-ready agreement among relevant cities, counties, and service 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]

Consultant will hold up to four meetings with the City 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.

Consultant will hold up to 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.

Consultant will develop staff reports and meeting materials, with guidance from City 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 City Deliverable:

- Public work session and hearing notices and agendas

Concept Area & Development Readiness Plan Sample Work Program

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]

The purpose of the project kick-off is for Consultant to become familiar with local conditions and with City's planning documents, for the parties to confirm the objectives of the project and refine the project schedule, and for the City to prepare for the Project. Consultant will contact City via a conference call, or in person, to ask preliminary questions, establish project expectations, and familiarize itself with city-specific concerns. Consultant will verify the action items identified through this initial conference call with the City 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 City and the Consultant.

Consultant will have [monthly/biweekly] check-ins with the City 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 City 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]

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 City. The final map set will be tailored to the availability of data; map topics and information will be finalized in consultation with the City. The existing conditions maps and analysis will be formatted into presentation slides,

presentation boards, and an Existing Conditions Compilation Report.

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. Consultant shall identify how lands within the study area may be annexed into the city in the future, consistent with OAR 660-014-0060 or with OAR 660-014-0070.

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 city 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 discussion 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). 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 City); the City will provide a recently developed BLI database if available, 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 City Deliverables:

- The City will prepare a 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]

City and Consultant will identify and facilitate engagement with stakeholder groups including relevant community and advocacy organizations and housing developers. City and Consultant will solicit input from stakeholders to:

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

City will schedule, and provide notices and an agendas, for any needed advisory committee (AC) meeting to review relevant project materials and advise the City. Consultant will coordinate with City 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 stakeholders
- Advisory committee meeting summary or summaries
- Community engagement summary or summaries

Task 3 City Deliverable:

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

Task 4: Area Plan Concepts and Refinement

Timeline: DATE - DATE

Estimated Cost: [Direct Grants only]

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. 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 City will lead the coordination with ODOT on approval of the methodology. To the extent practicable, 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, 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. City will create findings for compliance with applicable goals, statutes, and administrative rules.

For the infrastructure analysis, the City 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 City will obtain cost estimates from relevant service providers, including correspondence, notice, and comment to relevant service providers. 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, 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 City Deliverable:

- Coordinating 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]

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.

Consultant will lead a work session with City 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 City will draft the code following the approach and outline included in the memo.

Consultant will prepare infrastructure funding plan, including water, stormwater, sanitary sewer, parks, schools, and transportation. The City 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 City staff and decision-makers.

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 City 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]

City will schedule and provide notice and an agenda for hearings to adopt the Concept Area & Development-Readiness Plan. Consultant will coordinate with City 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