

CITY OF BEND

Transportation and Land Use Planning Program Consulting Services

Task 12 – Southeast Bend Area Plan Scope of Work

Draft – 8/9/2018

Introduction

PROJECT PURPOSE

The purposes of this project are to:

- Prepare an Area Plan for the Bend UGB expansion area known as The Elbow (Project Area);
- Implement applicable policies in the Bend Comprehensive Plan to enable and facilitate annexation and future development within the Project Area;
- Work collaboratively with property owners, area residents, neighborhood associations, and other stakeholders so that the plan may reflect their interests;
- Implement Council direction to prioritize area planning efforts in the Project Area; and
- Identify infrastructure financing strategies to ensure complete development of the Project Area.

Where needed for infrastructure and funding analysis, this scope assumes a planning horizon of 2040, and use of growth assumptions consistent with the update of the Bend Transportation System Plan (TSP).

DEFINITIONS AND ABBREVIATIONS

Project Area – refers to the southeast Bend UGB expansion area known as The Elbow

City – refers to both the City of Bend as whole and City of Bend staff

GMD – City of Bend Growth Management Department

Consultant – The Angelo Planning Group Team. The APG team includes the following firms for this task: Angelo Planning Group (APG), DKS Associates (DKS), ECONorthwest (ECO), Jacobs, Kittelson and Associates (KAI), and Walker Macy (WM). Additional firms authorized under the Transportation and Land Use Planning Program (Contract No. 31800225) may be authorized for work on Task 12 at the discretion of the City.

ASSUMPTIONS

Assumptions that apply generally are listed below. Additional task-specific assumptions are listed within the scope.

1. Deliverable work products will be provided in draft and final form, in electronic formats specified as acceptable by the City.
2. Meetings specified as occurring in Bend have been budgeted accordingly. Other meetings generally referenced will occur via conference call, video call, or in-person as part of scheduled trips to Bend. The scope is intended to be flexible so that meetings can occur as needed and in the most efficient and appropriate format.
3. The Consultant team and City will seek to combine all trips to Bend per this scope with trips to Bend for other projects, when possible.
4. GIS data sets will be prepared and delivered for all deliverables that are GIS-based. This scope recognizes that not all deliverables will be GIS-based.
5. The Area Plan will be prepared in GIS format with spreadsheets created for analysis and metrics. A contingency task has been added for potential use of the Envision Model.
6. City of Bend staff roles and responsibilities include:
 - a. Manage and maintain the public and legal record for the project.
 - b. Provide ongoing interdepartmental staff expertise and involvement in the project, including legal counsel.
 - c. Review and comment on all draft work products, providing consolidated and reconciled edits and comments.
 - d. Prepare, finalize, and distribute meeting summaries and minutes. Consultant will prepare draft meeting summaries and minutes where specified in the scope.
 - e. Make logistical arrangements for public meetings, including reserving venues, providing refreshments as needed, distributing meeting materials to participants, distributing meeting materials through established processes (e.g. existing email lists), and posting announcements and meeting materials on the project website.
 - f. Facilitate ongoing involvement from, and provide information to, a broad array of City staff from many departments. Continuity of the same key staff throughout the project will be facilitated to the extent possible.
 - g. Facilitate opportunities to participate for service providers, including sanitary sewer, parks, schools, irrigation, and private utilities (e.g. power, water, gas).
 - h. Host and update the project website, with support from the Consultant as specified in the scope.
 - i. Serve as the regular contact for communication with local media representatives.

- j. Manage comments and questions from citizens and stakeholders, serving as the lead point of contact for the public.
- k. The City will create a project wordmark and templates for agendas, memos, and presentations.

Tasks and Deliverables

TASK 12.1 – PROJECT MANAGEMENT

Project initiation will include a team kick-off meeting to review and finalize project objectives, roles, communication protocols, the scope and milestone-level schedule, quality assurance procedures, and other elements to be captured in the project team charter. The public involvement approach will be refined in a Public Involvement Plan (Task 12.3). The kick-off meeting will be conducted via video conference (or in-person for those team members who can combine with another trip to Bend). An in-person team meeting will be held when the Consultant is in Bend for Task 12.2.

Following the kick-off meeting, APG will prepare a detailed project schedule, coordinated with other GMD planning efforts (e.g. Bend TSP, TSDC update, Core Area Vision + Action Plan). This scope assume the planning process will run a maximum of 18 months.

The Project Management Team (PMT) will meet bi-weekly, focusing on major project issues and progress. The Consultant will also prepare project status reports (with each invoice) and provide overall project management.

Deliverables:

- a. SharePoint site set-up and management
- b. Project kick-off meeting and charter, via video conference
- c. Project schedule creation and updates
- d. Bi-weekly 1-hour PMT meetings with City staff (30 total), via conference call
- e. Project status reports prepared monthly, with invoices (18 total reports)

TASK 12.2 – EXISTING CONDITIONS, PLANS, AND LAND USE PROGRAM

Task 12.2 will create a baseline of information to be used throughout the project. The following list of 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 PPT slides, presentation boards, and an Existing Conditions Compilation Report (Technical Memorandum #1) and will include:

- Existing physical conditions (e.g. topography, natural features, structures, trees/vegetation, rock outcrops, roads, canals, utility corridors, etc.)

- 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 the BLI database developed for the UGB project, APG will review and update as needed for the Area Plan
- Landscape and citywide context (two context maps that are larger than the study area—one will be a citywide context and the other is TBD, to be suggested by the consultant team)
- Local walksheds and bike-sheds, per evaluation by the Consultant

The City will prepare a memorandum summarizing applicable plans and programs (Technical Memorandum #2):

- Applicable Comprehensive Plan designations and policies, including specific requirements and guidance to the Area Plan
- Applicable park, trail, and school plans
- Planned infrastructure improvements, including water and sewer
- Planned transportation improvements (all modes)
- Other applicable plans, such as the Integrated Land Use and Transportation Plan (ILUTP)

As part of Task 12.2, the PMT will convene in Bend for field work and review of existing conditions (two-day trip). A work session with City staff (and other agencies as appropriate) will be held to discuss existing and planned conditions.

ECO will prepare a Market Analysis and Land Use Program Report for the Area Plan (Technical Memorandum #3). 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). ECO will reach conclusions regarding what the Program (or alternative programs) should be for the Area Plan. This work is intended to help refine the land uses (e.g. what type of industrial uses are suitable for the area), communicate to the community examples of uses being planned for, and guide the work of the design team 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). APG will prepare a one-page handout that summarizes key market analysis findings and land uses.

Deliverables:

- a. Two-day trip to Bend for field work and existing conditions work sessions
- b. Existing conditions maps, diagrams, and compilation report (Technical Memorandum #1), with photography from field work
- c. Market analysis and land use program memorandum, with recommendations (Technical Memorandum #3)
- d. One-page handout summarizing key market analysis findings and land uses

TASK 12.3 – COMMUNITY ENGAGEMENT

Public Involvement Plan - This task will begin with the creation of a Public Involvement Plan (Technical Memorandum #4). The goals of the plan are 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.

APG will create an initial draft and coordinate with City staff regarding: (a) the strategies and outreach methods; and (b) the timing and nature of community events and outreach relative to other City initiatives (e.g. Bend TSP; TSDC update; Core Area Vision + Action Plan). The Public Involvement Plan will seek to avoid duplicative efforts and information overload by combining and coordinating with other initiatives as much as is practical. Jacobs will provide input into the Public Involvement Plan and assist with coordination as noted in (b) above.

Early Outreach Program - APG and the City will create and participate in an Early Outreach Program for the Area Plan. The goal is to help the community be aware of, prepare for, and inform the upcoming area planning process. Example questions to be addressed include: What is an Area Plan? Why prepare one? How will it benefit the Southeast Bend community? How can people participate? The specific outreach deliverables will be defined as part of the Public Involvement Plan. Jacobs will provide input into outreach program and comment on deliverables. Budget resources for this task are intended to support the following deliverables:

- Project overview narrative
- Frequently asked questions narrative – City staff to develop with APG to review
- 10-20 slide presentation
- One visit, with City staff, to a neighborhood association or similar meeting, as part of another trip to Bend

Outreach Activities with Stakeholders – The Area Plan process will be open and provide opportunities to participate for a wide variety of stakeholders external to the City. A preliminary list of stakeholders is attached as Exhibit A. The Area Plan process will include the following types of outreach and public information (subject to refinement per the Public Involvement Plan):

- a. **SE Area Plan Advisory Committee (SEAPAC).** The City will establish an Advisory Committee to provide a forum for community input, advise the project team, and make recommendations to the Planning Commission and City Council. The City and Growth Management Department team will: establish the purpose and mission of the SEAPAC; recruit and appoint the membership; handle logistics and meeting minutes for SEAPAC meetings; be the primary contact for SEAPAC-related participation and communications; serve as lead City staff for their work; and, coordinate the involvement of other City departments. The APG team will: prepare agendas and primary meeting materials;

facilitate SEAPAC meetings; provide planning and related expertise needed for the work of the committee.

The APG team will conduct the above-listed services and participate in six SEAPAC meetings in Bend (meetings 2-7 below). The preliminary list of meetings and topics are:

- Meeting 1 – Orientation, background information and Committee guidelines (City staff will lead this meeting. APG will support but not attend).
 - Meeting 2 – Existing conditions, market analysis, vision
 - Meeting 3 – Plan concepts, part 1
 - Meeting 4 – Plan concepts, part 2
 - Meeting 5 – Refined plan and implementation ideas
 - Meeting 6 – Draft plan and Implementation, part 1
 - Meeting 7 – Implementation, part 2 and draft recommendations
- b. **Informational and check-in meetings with individual stakeholder groups.** Outreach to individual stakeholder groups (e.g. Neighborhood Associations members or chairs, property owners) will be a key outreach activity, conducted generally before and after each of the Community Workshops. City staff will lead this effort, using materials prepared by the Consultant. The intent is to provide small-format meetings and tailored opportunities for information exchange and idea testing, as an alternative to a traditional advisory committee setting and as a supplement to Community Workshops.
- c. **Community Workshops.** Community Workshops are planned for hands-on engagement by community members and stakeholders. For each of the workshops, the Consultant will: prepare a meeting plan; lead the preparation of workshop handouts, displays, presentations, and materials for small group exercises; and summarize the input received in a Workshop Summary Report. Preliminarily, the workshop topics will be:
- Workshop 1 – Existing conditions, market analysis findings, vision and guiding principles
 - Workshop 2 – Plan concepts, part 1
 - Workshop 3 – Plan concepts, part 2
 - Workshop 4 – Draft plan and implementation strategies

The Community Workshop process will be determined as part of the Public Involvement Plan. The base project budget provides resources for the four workshops described above. If another meeting format (e.g. multi-day charrette) is selected, the City and APG will discuss whether contingency funds are needed.

- a. **Online open houses** – Three online open houses will coincide with three of the four Community Workshops or other outreach milestones. The City will lead the preparation, administering, and reporting from the online survey components of the online open houses. APG will provide graphic content, identify questions to be asked, and review materials and results summaries prepared by the City.

- b. **Website and social media** – The City will establish and monitor a website for the project. The City will distribute information via its social media channels, as needed. APG will review content.
- c. **Community outreach events** – At the City’s discretion, City staff will include Area Plan information at tabling events held during other community events. Potential events for tabling will be addressed in the Public Involvement Plan.
- d. **Briefings for Bend Advisory Boards** – City staff will provide briefings for Bend Advisory Boards (e.g. BEDAB).

Check-Ins at Regular Planning Commission and City Council Meetings – City staff will schedule check-ins, up to four each, with the Planning Commission and City Council. The check-ins will be held after key meetings/events and for the purpose of providing updates and checking in on/establishing direction that the process and working products are on the right track. The goal is to use these check-ins to keep each body informed, check in on direction, and provide progress reports leading up to their respective work sessions and hearings.

Funding Plan Coordination – See Task 12.7.

Coordination with City Departments – City staff will lead the coordination with, and involvement of, City departments. They will use existing communication structures and meetings to coordinate with City departments and stakeholders internal to the City. The “Operations Direct Reports” group is anticipated as being a primary meeting setting for on-going briefings and coordination with other departments. City staff will supplement this with other contact and involvement as needed.

In addition to the above specified meetings, City staff will provide briefings to the Planning Commission and Council periodically during the project.

Deliverables:

- a. Public Involvement Plan (Technical Memorandum #4)
- b. Materials to support the Early Outreach Program and Informational Check-Ins
- c. Materials to support, and participation in, SEAPAC meetings:
 - 1. Meeting 1 – Orientation, background information and Committee guidelines (City staff will lead this meeting, APG will support but not attend).
 - 2. Meeting 2 – Existing conditions, market analysis, vision
 - 3. Meeting 3 – Plan concepts, part 1
 - 4. Meeting 4 – Plan concepts, part 2
 - 5. Meeting 5 – Refined plan and implementation ideas
 - 6. Meeting 6 – Draft plan and Implementation, part 1
 - 7. Meeting 7 – Implementation, part 2 and draft recommendations
- d. Meeting plan, materials, team preparation, summary report, and participation in Community Workshop 1, as described above
- e. Meeting plan, materials, team preparation, summary report, and participation in Community Workshop 2, as described above
- f. Meeting plan, materials, team preparation, summary report, and participation in Community Workshop 3, as described above

- g. Meeting plan, materials, team preparation, summary report, and participation in Community Workshop 4, as described above
- h. Support to City for online open houses, website, social media content, and materials for use at community events

TASK 12.4 – VISION AND GUIDING PRINCIPLES

APG will synthesize the input received in Task 12.3 and the first community workshop, to generate a draft “Vision and Guiding Principles” for the Area Plan (Technical Memorandum #5). The Vision and Guiding Principles, in a summary document and PowerPoint presentation format, will be reviewed by external stakeholders and presented to the Bend Planning Commission and Bend City Council during project check-ins.

Deliverables:

- a. Vision and Guiding Principles document (Technical Memorandum #5) and presentation

TASK 12.5 – AREA PLAN CONCEPTS AND DIRECTION

Based on the existing conditions work in Task 12.2, and the Vision and Guiding Principles statement produced in Task 12.4, the Consultant team will prepare initial “sketch-level” plan concepts for land use and transportation. The plan concepts will be informed by, and implement, the direction set by the UGB process and policies of the Bend Comprehensive Plan (especially Chapter 11, Growth Management). The plan concepts will include the following (preliminary list, subject to refinement in collaboration with the City):

- **Land use concepts** – refinements of existing plan designations, or new plan designations needed to achieve the vision.
- **Transportation concepts** – maps of existing and proposed streets, bikeways, pedestrian paths, coupled with cross-sections and other designs. Future transit, if applicable, will be described. A local street demonstration plan will be prepared to illustrate potential connectivity.
- **Parks, schools, and civic places concepts** – guidance for the type and general location for these key public uses.
- **Open space and natural resource concepts** – maps and implementation strategies.
- **Area-specific public amenities** – ideas for special uses such as gateways, plazas, viewpoints, and buffers between uses.
- **Early implementation ideas** – in response to issues and needs identified by the community and team, concepts for implementation will be prepared. Examples include transitional buffers between residential and non-residential uses, a mixed-use zone/approach that permits some housing to be built with employment, and early infrastructure funding concepts.
- **Plan graphics** - The above-listed concepts will be accompanied by precedent imagery, diagrams, character sketches and similar graphics to help illustrate the

place and describe proposed concepts (e.g. how many homes may group around a neighborhood park; transitions between employment and residential uses). A total of 5-7 original graphics will be prepared as part of this task.

The above-listed plan concepts will be informed by input (from the City and Murraysmith) on water and sanitary sewer implementation. However, specific planning-level layouts and costs will be prepared in Task 12.6, based on the refined plan.

The Consultant will make a two-day trip to Bend to review working plan concepts. The Consultant will prepare materials for the work sessions and facilitate meetings. In addition to the two-day trip, the Consultant will conduct two GoTo meetings to review and discuss plan concepts.

The plan concepts will be used in the Community Workshops and associated outreach in Task 12.2.

Deliverables:

- a. Land use concept maps and descriptions
- b. Multi-modal transportation concept maps and descriptions
- c. Parks, schools and civic places concept maps and descriptions
- d. Open space and natural resource concepts maps and descriptions
- e. Area-specific public amenities maps and descriptions
- f. Early implementation ideas
- g. Plan graphics (precedent images and 5-7 original graphics)
- h. Two-day trip to Bend
- i. Two GoTo work sessions

TASK 12.6 – AREA PLAN ANALYSIS AND REFINEMENT

Community review and refined plan - Based on feedback from the community at the second community workshop and its on-line survey, the Consultant team will prepare a refined land use and transportation concept map for the area. The refined concept will be the first draft of a proposed “plan” for the area and will be used for infrastructure analysis by KAI and service providers (e.g. City and Avion Water).

Transportation analysis – This task is intended to: (1) provide the technical analysis required for demonstrating compliance with the Transportation Planning Rule, OAR 660-012-0060; (2) identify the projects that will be evaluated in the Infrastructure Funding Plan; and, (3) support the refinement of the Area Plan.

KAI 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. KAI will prepare a draft methodology memo (Technical Memorandum #6) for use in the meeting, participate, and finalize the memo based on the discussion. The City will lead the coordination with ODOT on approval of the methodology.

To the extent possible, KAI will utilize modeling, data, and project costs prepared as part of the TSP project. The City understands that the modeling will rely on plan designations and metrics based on the plan designations currently assigned to properties in the Elbow, and transportation facilities identified during the TSP process. If the Area Plan proposes changes to the plan designations for the Project Area, resulting in net changes to the total housing units and/or employment numbers, KAI will coordinate with the MPO to obtain a new run of the travel demand model based on these new inputs. KAI will post-process this data to perform a new analysis evaluating key intersections and roadways to identify future deficiencies, and recommending motor vehicle, bicycle, and pedestrian projects to meet future needs. Based on this traffic impact analysis, KAI will prepare a final technical memorandum (Technical Memorandum #7) that documents the results of the modeling for the Project Area, organized to support compliance findings with the Transportation Planning Rule at OAR 660-012-0060. This final technical memorandum will include planning level (Class 5) cost estimates for transportation facilities, with the cost estimating method consistent with that used to update the Bend Transportation Plan and the recent SDC updates. KAI's technical memo will include an executive summary that can be used as descriptive text and graphics in the final Area Plan report. DKS will conduct a peer review, and prepare a memo (Technical Memorandum #8, commenting on consistency with the in-progress TSP update. City will create findings for compliance with OAR 660-012-0060.

KAI will participate in two team meetings and work sessions as part of this task. Preliminary, the steps in the analysis are listed below. The approach is to assess whether the proposed SE Expansion Area will result in significant impacts to the transportation system (as documented in the Transportation Planning Rule (TPR), OAR 660-012-0060) as well as to identify the potential multi-modal mitigation improvements needed to support the expansion. KAI will compare transportation system impacts, with existing rural zoning and with proposed urban zoning, using the following steps/subtasks:

1. Coordinate with the MPO to obtain year 2040 traffic forecasts, using existing rural zoning, for the following locations (15):
 - a. SE 27th Street/Reed Market Road;
 - b. SE 27th Street/SE Stevens;
 - c. SE 27th Street/US 20
 - d. SE Knott/SE Rickard Road;
 - e. SE 15th Street/Reed Market Road;
 - f. SE 15th Street/Knott Road;
 - g. SE 15th Street/Murphy Road (future);
 - h. SE 15th Street/Ferguson Road;
 - i. SE 27th Street/Ferguson Road;
 - j. SE Brosterhous/Knott Road;
 - k. SE Country Club Road/SE Knott Road;
 - l. Murphy Road/Brosterhous Road;
 - m. Murphy Road/Country Club Road;
 - n. Murphy Road Road/US 97;
 - o. Knott Road/US 97;

- p. China Hat Road/US 97;
- q. China Hat Road/Knott Road; and
- r. China Hat Road/Parrell Road.

KAI will check the land uses and forecasts to ensure they accommodate the most recent zone change activity (e.g. schools in SE Bend).

2. Coordinate with the MPO to re-populate the Transportation Analysis Zones in the SE Expansion area assuming the properties are developed under the proposed Comprehensive Plan and Zoning Designations. TAZs will be refined as needed.
3. Coordinate with the MPO to obtain year 2040 traffic forecasts, assuming urban zoning in the SE Area Plan (and new proposed transportation facilities, if any, for the SE Area Plan), at the 18 locations identified above. KAI will check the land uses and forecasts to ensure they accommodate the most recent zone change activity (e.g. schools in SE Bend).
4. Based on the travel forecasts obtained from the MPO, identify the locations where the expansion area would result in an increase in 50 weekday PM hour trips at ODOT intersections in the area as well an increase in 15 or more weekday PM peak hour trips at the City intersections within the impact area defined in the methodology memo. Prepare a brief memo documenting the difference and confirming the results with ODOT and City staff (Transportation analysis methodology memorandum). Should this analysis result in additional impacted intersections beyond those identified in the list of 18 above KAI will prepare a modified scope and budget for City review.
5. KAI will analyze year 2040 weekday PM peak hour intersection operations, both with and without the Area Plan's proposed urban zoning, at the 18 study intersections. KAI will identify locations where the proposed urban zoning would change the needed improvements to the roadways and/or intersections to assess the impacts of the expansion per the TPR.
6. KAI will identify mitigation measures associated with the impacted locations to address the TPR.
7. KAI will perform an analysis of the available pedestrian and bicycle facilities within 1.5 miles of the UGB expansion area and identify gaps in this system and documented plans to address these gaps. KAI will identify whether additional multimodal facilities are needed to support the Area Plan.
8. KAI will work with the team to identify key pedestrian, bicycle and transit infrastructure needed within the Expansion Area as well as the key "portal locations" into the area.

KAI will document the findings of the above analysis in a memorandum addressing the TPR and the City-related transportation criteria.

Infrastructure analysis - The City will facilitate reviews of the refined concept by service providers for water, sanitary sewer, parks, and schools. APG will provide land use metrics to support the reviews. Murraysmith (managed by the City) will prepare a memorandum describing and illustrating planning-level facilities for sanitary sewer, with cost estimates (Technical

Memorandum #9). The City will obtain cost estimates for parks and schools from the districts, and for water from Avion Water Company.

Service provider review - The City will request a review and comments from the Bend-La Pine School District, the Bend Park and Recreation District, and Avion Water Company. For other services providers (e.g. irrigation, power, gas), the City will send letters and provide opportunity to comment. Murraysmith's technical memo will include an executive summary that can be utilized as descriptive text and graphics in the Area Plan report.

Draft plan - Based on the infrastructure analyses and service provider input, APG and WM will prepare the draft plan drawing for public review at Community Workshop #3. The graphics from Task 12.5 will be revised if needed, and 3-5 additional graphics will be prepared to illustrate the proposed plan and its implementation.

Deliverables:

- a. Refined plan map, supporting GIS data, and metrics for use in infrastructure analysis
- b. Two transportation analysis work sessions (GoTo, or in-person if possible)
- c. Coordination meeting with ODOT and transportation analysis methodology memorandum (Technical Memorandum #6, KAI)
- d. Traffic impact analysis
- e. Draft and final transportation analysis memo to be used as technical basis for TPR compliance (Technical Memorandum #7, KAI)
- f. Peer review memo on consistency with the in-progress TSP update (Technical Memorandum #8, DKS)
- g. Sewer Infrastructure analysis memo (Technical Memorandum #9, Murraysmith)
- h. Draft plan drawing
- i. Update of Task 12.5 graphics (as needed) and 3-5 additional graphics

TASK 12.7 – IMPLEMENTATION AND ADOPTION DOCUMENTS

Area Plan summary report – APG and WM 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. Narratives will be concise, and graphics will be emphasized. A physical report and online version will be prepared. APG will compile a Technical Appendix for the summary report, which will include Technical Memoranda #1-12.

Definition of adoption products – The Southeast Area Plan will be the first Area Plan prepared and adopted under the Comprehensive Plan policies adopted in 2016. As such, it is especially important to define the actual adoption products. Prior to the start of the project, the City will review the legal and planning considerations to guide clarity on several key questions, for example: (a) what is an Area Plan in the Bend context; (b) what land use actions will be required to adopt the Area Plan; and (c) what is the anticipated list of adoption products. The team will review that guidance when the draft plan is partially complete, and update (if needed) the defined list of adoption products. The plan and zoning amendments tasks described below will operationalize that approach.

Comprehensive plan amendments and policies – APG will lead a work session with City staff to discuss potential Comprehensive Plan amendments and policies to implement the Area Plan (this meeting may be combined with the zoning implementation meeting described below). This scope assumes the direction will be to draft approximately five to ten enabling comprehensive plan policies. If a more robust approach is defined, a scope and budget amendment will be discussed to determine the Consultant’s role in that product.

TSP amendments – Based on the work in Task 12.6, the team 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.

Zoning implementation – APG will lead a work session with City staff to discuss the potential zoning implementation for the Area Plan. The team will explore whether to use existing zones and standards or create a Special Planned District. Following the meeting, a memo will be prepared describing the approach and outline to be used for the zoning implementation (Technical Memorandum #10). For purposes of initial scoping and budgeting, this scope assumes that a Special Planned District, similar in structure to Northwest Crossing (see BDC 2.7.300 – 2.7.330) will be prepared. The City will take the lead on drafting the code, following the approach and outline prepared by APG. APG will support City staff by answering questions and reviewing up to three drafts of the code.

Infrastructure funding plan – This task will prepare an implementable strategy and funding plan (Technical Memorandum #11) for infrastructure, including water, sewer, and transportation. Although a Funding Plan sounds like a technical document, in many ways it represents a policy-making or policy-implementation process. Accordingly, the City will provide policy guidance and finance staff participation during preparation of the funding plan.

The funding plan process will start with an “initial funding analysis” where ECO will prepare a preliminary transportation funding gap analysis, using the City’s 2018 Return on Investment Study document and other previously prepared reports¹. The purpose of the initial analysis is to estimate the size of the gap and identify new funding sources that may be needed. This work will support input into the TSP process and discussions with ODOT, Deschutes County, and the Bend MPO. Following the initial funding analysis, ECO will prepare the funding plan, following the steps outlined below.

ECO will provide the following services and deliverables:

- One funding team workshop in Bend, and two work sessions by GoTo conference. APG will participate.
- Identification of potential revenues for each infrastructure type.
- Identification of potential costs for each infrastructure type. Transportation costs will be provided by KAI. Sanitary sewer costs will be provided by the City, via their consultant

¹ See Final Return on Investment Study Report and Appendices - <https://www.bendoregon.gov/home/showdocument?id=36542>.

(Murraysmith). Water costs will be provided by Avion. The City will be the lead for obtaining costs from Avion.

- Estimates of gaps between revenues and costs, and recommendations for filling the gaps. The recommendations may describe options, but will take the next step to reach conclusions as to the gap filling strategies and amounts the City should implement. The funding strategies will identify recommended funding sources.
- All of the above will be captured in a Funding Plan technical memo, with an executive summary suitable for use in the Area Plan summary report.

The funding plan is a unique element of the Area Plan that will be focused on the technical and policy implications of infrastructure funding. It requires the input and expertise from internal stakeholders, including the City's Finance Department. A funding work group for the Area Plan may be formed for this specialized and limited-duration function. There is a coordination opportunity to tap into the expertise of the TSP Funding Work Group, and the City's Finance and Engineering and Infrastructure Planning Departments. This scope assumes two trips to work with City staff. For the meetings, the Consultant will prepare the agenda and materials, and facilitate the meeting.

Implementation report – APG will package the Comprehensive Plan amendments, TSP amendments, zoning implementation, Comprehensive Plan and Zoning Map designations, and Infrastructure Funding Plan into an Implementation Report (Technical Memorandum #12). The report 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.

Deliverables:

- a. Area Plan summary report and technical appendix
- b. Comprehensive plan amendments
- c. Transportation System Plan amendments
- d. Zoning implementation memorandum (Technical Memorandum #10)
- e. GIS dataset showing final comprehensive plan and zoning designations
- f. Funding team workshop and Initial funding analysis
- g. Funding plan part 1 – revenue, costs, gaps, strategies
- h. Funding plan part 2 – Draft recommendations
- i. Funding plan report (Technical Memorandum #11)
- j. Implementation Report (Technical Memorandum #12)
- k. Two trips/meetings to work with City staff on the funding plan.

TASK 12.8 – ADOPTION

The Consultant will support City staff in the adoption and implementation processes for the Area Plan. The Consultant will prepare adoption documents as described in this scope, and a presentation for use in the hearings. The City will prepare all notices, findings, staff reports and record entries, and comment logs associated with the hearings. The Consultant will support the City in developing staff recommendations regarding testimony received. The Consultant will

attend one meeting of the Planning Commission and one meeting of the City Council. Additional meeting attendance will be addressed through Contingency budget, if needed.

Deliverables:

- a. Finalization of scoped deliverables for use as adoption documents
- b. Review of findings and staff reports
- c. Participation in two Planning Commission meetings (one work session and one hearing) and two City Council meetings (one work session and one hearing)

CONTINGENCY TASKS FOR THE AREA PLAN

The City may authorize additional work, as described below, without a contract amendment. If requested by the City in order to provide additional specificity to the descriptions given below and the budget estimates provided, Consultant shall provide a written description of the additional services, and cost estimate, for the City to review. No work will be completed under these contingency tasks unless written authorization is provided by the City. The Contingency budget identified for this Area Plan project are resources that may be flexibly used as directed and authorized by the City.

The anticipated Contingency services include but are not limited to:

- a. An additional Community Workshop
- b. Participation in additional work sessions or hearing with the Planning Commission or City Council
- c. Additional graphics and visualizations
- d. Use of the Envision model
- e. Additional analysis to support compliance with the Transportation Planning Rule

Exhibit A
Preliminary List of Stakeholders – Southeast Bend Expansion Area Plan

External Stakeholders

Bold = high direct stake in the process and outcomes

- 1. Elbow Property Owners**
- 2. Southeast Bend Neighborhood Association**
- 3. Old Farm District Neighborhood Association**
- 4. Bend LaPine School District**
- 5. Bend Parks and Recreation District**
6. Avion Water Company
7. Arnold Irrigation District
8. Cascade Natural Gas
9. Pacific Power
10. Transcanada - natural gas transmission company that manages pipeline that bisects the southeast corner of the Elbow
11. Oregon Department of Transportation
12. Deschutes County Community Development
13. Deschutes County Road Department
14. Property owners to the north and west
15. JL Ward Company (See 15th Street Opportunity Area)
16. Property owners to the south and east, outside of the UGB
17. Department of Land Conservation and Development
18. Department of State Lands
19. Deschutes County Solid Waste Department (Knott Landfill)

Internal Stakeholders

- a. City Manager's office
- b. City Attorney's office
- c. Community Development Department
- d. Communications Department
- e. Engineering and Infrastructure Planning Department
- f. Growth Management Department
- g. Streets & Operations Department
- h. Utility Department
- i. Finance Department
- j. Bend MPO