WELCOME!

SOUTHEAST AREA PLAN ADVISORY COMMITTEE

JANUARY 17, 2019
BEND TRANSPORTATION AND LAND USE PROGRAM
Southeast Area Plan Work Plan and Process

SE AREA PLAN

2018
Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Orientation
Existing conditions, market analysis, vision

2019
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Plan concepts
Concept plans
Modeling
Refined plan, implementation ideas
Draft plan, implementation
Area plan report, implementation report

2020
Aug Sep Oct Nov Dec

WS#1 Existing conditions
WS#2 Plan concepts
WS#3 Plan, implementation

Old Farm
SE Bend
Old Farm

CITY OF BEND
SOUTHEAST AREA PLAN
PUBLIC INVOLVEMENT PLAN
These slides present several examples of special planned districts in Bend.

The districts differ in size, land use planning, road alignment, and building design standards.

They’re intended to show how special planned districts have been used to plan for areas with or without a master plan or area plan.

The City has eighteen (18) special planned districts that include master planned communities, smaller planned neighborhoods, schools and colleges, and natural areas.
SPECIAL PLANNED DISTRICTS

• Cover areas of various size in Bend
  • For example: Dean Swift – 29 Acres; NorthWest Crossing – 486 acres

• Some allow land uses different from those allowed in base zones

• Some rely on overlay zones or overlay districts to allow different densities and types of housing

• Several have specific roadway and right of way plans

• Several have their own design and development standards for homes and buildings
• Bend Development Code, Chapter 2.7: Special Planned Districts:
  • 2.7.300 to 2.7.330 – NorthWest Crossing Overlay Zone
  • 2.7.400 – Dean Swift Refinement Plan Development Standards
  • 2.7.800 to 2.7.930 – Murphy Crossing Refinement Plan
  • 2.7.1000 to 2.7.1010 – Central Oregon Community College (C OCC) Special Planned District/Overlay Zone

• See Development Code online - https://www.codepublishing.com/OR/Bend/
• Special planned district with overlay zone

• Implements Public Facilities Zone (PF) at the Awbrey Butte Campus

• Describes allowed land uses in Core Campus Area and Campus Village Area

• Includes road and circulation plan for campus
• Implements refinement plan for Dean Swift Area
• Overlay zone includes development standards for four residential subareas
• Mixed employment area
• Design standards
• Road layout plan
• Special planned district implements Murphy Crossing Refinement Plan

• Street plan includes specific ROW specs for internal streets and frontage road

• Plan designations include standard and medium residential, mixed employment, general commercial
• Overlay zone implements NorthWest Crossing Master Development Plan and Bend Comp Plan policies

• Five (5) overlay districts for different types of housing

• Two commercial districts

• Two employment areas zoned ME and IL

• Two schools, four public parks
LEARNING FROM OTHER AREA PLANS
• 500 Acres
  o 220 ac. in UGB
  o 280 ac. in urban reserve
• 52 properties
• Area Planning completed in 2017
• Middle school built
• 35 acres annexed and under construction
• 28 acres submitted/pending for 2019 development
• High pace of activity and sense of momentum
• Variety of residential zones
• Framework Streets (solid black lines)
• Local Street Connections Guidance (dashed lines)
STREET AND INTERSECTION TYPES WITH TRANSPORTATION ANALYSIS
BICYCLE, PEDESTRIAN AND TRAIL FRAMEWORK
STRONG CONNECTIONS TO EXISTING CITY
The area is pre-planned for local streets.

There is flexibility to provide “substantially equivalent connectivity” through development review.
• Gateways
• Design Standards
• Street Tree Plan
• Boeckman Creek Trail
THE FROG POND FUNDING PLAN

- Identifies key Master Plan projects, costs and timing
- Determines who pays for what
- After a review of multiple tools, adopted a new funding tool: the Frog Pond Infrastructure Supplemental Fee:
  - Pays for the portion of Master Plan infrastructure not covered by SDCs or other sources
  - Distributes costs equitably to all development (equivalent dwelling unit basis)
  - Adds $15,000 (approx.) to each EDU
## FROG POND FUNDING PLAN

### SUMMARY MASTER PLAN PROJECTS

<table>
<thead>
<tr>
<th>Project</th>
<th>Estimated Total Cost*</th>
<th>Who Builds</th>
<th>Proposed Funding Sources</th>
<th>Notes / Amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boeckman Road with sanitary sewer</td>
<td>$ 4,438,000</td>
<td>City</td>
<td>Supplemental fees SDCs</td>
<td>South side North side $2.02 million $2.42 million</td>
</tr>
<tr>
<td>Stafford Road with water and sanitary sewer</td>
<td>3,164,000</td>
<td>City</td>
<td>Supplemental fees SDCs</td>
<td>West side only, east side pending UGB expansion</td>
</tr>
<tr>
<td>Neighborhood Park</td>
<td>2,407,000</td>
<td>City</td>
<td>Supplemental fees</td>
<td>Land Improvements $980,000 $1,427,000</td>
</tr>
<tr>
<td>Trailhead Park</td>
<td>1,143,000</td>
<td>City/Developers</td>
<td>SDCs</td>
<td>Land Improvements $588,000 $555,000</td>
</tr>
<tr>
<td>Boeckman Trail</td>
<td>850,000</td>
<td>City/Developers</td>
<td>SDCs</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$ 12,002,000</strong></td>
<td></td>
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</tbody>
</table>

*All costs are planning level estimates and assume public sector construction*
• Added to UGB in 2004 for large lot industrial uses
• Concept Plan (2007) - identified land uses, streets, needed infrastructure, zoning, funding tools (not a plan)
• Overall, slow to annex and develop due to:
  • Recession
  • Big infrastructure needs
• City formed an urban renewal district, and built some key infrastructure
• Area is now experiencing high level of development interest and activity
• 300+ acres zoned, served and available industrial sites
• Established in 1999, following completion of master plan and city investment in trunk infrastructure
• About 1/3 developed, with 14 industrial companies, totaling about 1000 jobs
• Multiple industrial prospects looking at sites in 2018
• Viewed as local success story
• Source: 2018 Canby State of the City address to Canby Area Chamber of Commerce
Pioneer Industrial Park, Canby

Evergreen Concept Plan, Hillsboro

Frog Pond Area Plan, Wilsonville

AREA PLAN EXAMPLES
EXISTING CONDITIONS
AREAS OF SPECIAL INTEREST
Existing trail looking north

Terminus of existing trail at High Desert Middle School, looking south
ACTIVE TRANSPORTATION
SE EXPANSION AREA MARKET AND LAND USE ANALYSIS
WHY A MARKET ANALYSIS?

• A Market Analysis synthesizes data analytics and qualitative information to show current and projected future market trends.

• A Market Analysis helps to illustrate what is possible

• A Market Analysis is not a crystal ball.
  • Market cycles happen, real estate trends change.
NEW DEVELOPMENT – DEMAND DRIVERS
WHAT DRIVES NEW DEVELOPMENT?

• Development Drivers
  • Demographic Trends
  • Economic Growth
DEMOGRAPHICS TRENDS

Bend population growth, 1990-2040

Data source: US Census Bureau, Population Research Center and PSU
Unemployment Rate, 2008-2017

Data source: US Census Bureau, Population Research Center and PSU
Industry by occupation for the civilian employed population 16 years and over, Bend, 2000 to 2012-2016

<table>
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<tr>
<th>Industry</th>
<th>2000</th>
<th>2012-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance, Insurance, and Real Estate</td>
<td>1,909</td>
<td>2,613</td>
</tr>
<tr>
<td>Construction and Resources</td>
<td>3,213</td>
<td>3,681</td>
</tr>
<tr>
<td>Wholesale Trade, Transportation, and Utilities</td>
<td>1,278</td>
<td>1,862</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2,680</td>
<td>2,883</td>
</tr>
<tr>
<td>Retail</td>
<td>4,119</td>
<td>5,566</td>
</tr>
<tr>
<td>Education</td>
<td>5,033</td>
<td>9,439</td>
</tr>
<tr>
<td>Retail</td>
<td>8,333</td>
<td>15,958</td>
</tr>
</tbody>
</table>

Data source: US Census Bureau, Population Research Center and PSU
DEMOGRAPHIC AND ECONOMIC TREND SUMMARY

• Bend’s population is growing

• The economy is expanding

• SE Expansion Area was identified to absorb new homes and businesses

Data source: US Census Bureau, Population Research Center and PSU
COMMERCIAL REAL ESTATE TRENDS
Industrial Real Estate Market

Industrial Rent per Square Foot and Vacancy Rate, Bend, 2003-2018

Industrial Deliveries and Absorption (square feet), Bend, 2003-2018
RECENT INDUSTRIAL DEVELOPMENT

Building Type: Warehouse  
Year Built: 2016  
Tenant: Brewery (Warehousing)  
Size: 38,000 SF

Building Type: Flex  
Year Built: 2016  
Tenant: Data Center  
Size: 13,500 SF

Building Type: Warehouse  
Year Built: 2016  
Tenant: Multi-tenant  
Size: 8,400 SF
Office Rent per Square Foot and Vacancy Rate, Bend, 2003-2018

Office Deliveries and Absorption (square feet), Bend, 2003-2018
RECENT OFFICE DEVELOPMENT

**Building Type: Office**
**Year Built:** 2017
**Tenant:** Multi-tenant
**Size:** 50,000 SF

**Building Type: Office**
**Year Built:** 2014
**Tenant:** Multi-tenant
**Size:** 6,400 SF

**Building Type: Neighborhood Office**
**Year Built:** 2016
**Tenant:** Medical Office
**Size:** 5,100 SF
Retail Real Estate Market

Retail Rent per Square Foot and Vacancy Rate, Bend, 2006-2018

Retail Deliveries and Absorption (square feet), Bend, 2003-2018
RECENT RETAIL DEVELOPMENT

Building Type: Retail and Office
Year Built: 2017
Tenant: Multi-tenant
Size: 3,500 SF

Building Type: Retail
Year Built: 2018
Tenant: Multi-tenant
Size: 4,400 SF

Building Type: Retail
Year Built: 2018
Tenant: Multi-tenant
Size: 4,800 SF
RESIDENTIAL REAL ESTATE TRENDS
Household Size, Bend, 2000, 2012-16
Median Sales Price and Median Sales per SF, Bend, 2017 and 2018
RECENT MULTIFAMILY DEVELOPMENT

Building Type: Market Rate Rental  
Year Built: 2017  
Units: 132  

Building Type: Market Rate Rental  
Year Built: 2017  
Units: 228  

Building Type: Affordable Housing  
Year Built: Under Construction  
Units: 50
WHAT DOES THIS ALL MEAN FOR THE SE EXPANSIONS AREA?
RESIDENTIAL DEVELOPMENT – RESEARCH IMPLICATIONS

- Strong demand for new housing units of all types
- Demographic trends point to demand for smaller housing units
COMMERCIAL DEVELOPMENT – RESEARCH IMPLICATIONS

• Demand for industrial/flex uses will push incremental development

• The market potential of neighborhood office uses will increase over time

• Neighborhood retail will rely heavily upon future residential uses
ACHIEVING COMMUNITY ASPIRATIONS
IMPLICATIONS FOR IMPLEMENTATION

• Housing development will lead

• Achieving diverse housing types will require intentional action

• Bend has a strong and urgent need for more affordable housing

• Small businesses present opportunities for economic growth

• Proactive infrastructure funding and phasing is crucial
QUESTIONS AND CONCERNS – GRAB-BAG

• Compatibility and adjacencies

• Retail viability
COMPATIBLE ADJACENCIES

NW Lolo Drive (Facing South)

NW Lolo Drive (Facing North)
COMPATIBLE ADJACENCIES

Hood River Waterfront

Industrial Area

Awesome public park
RETAIL VIABILITY

<table>
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<tr>
<th>Retail Types</th>
<th>Population Factors</th>
<th>Locational Factors</th>
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<tr>
<td>Mid-Small Grocery Store</td>
<td>6,000 to 8,000</td>
<td>Clustered near other retail uses; High Visibility and Access</td>
</tr>
<tr>
<td>(10,000 to 40,000 sq. ft.)</td>
<td>people per store</td>
<td></td>
</tr>
<tr>
<td>Supermarket</td>
<td>10,000 people</td>
<td>Formulated for suburban shopping centers</td>
</tr>
<tr>
<td>(50,000 to 100,000 sq. ft.)</td>
<td>within 8 to 10-minute drive</td>
<td></td>
</tr>
<tr>
<td>Coffee Shop</td>
<td>15,000 to 20,000</td>
<td>Convenient access for pedestrians and drivers</td>
</tr>
<tr>
<td></td>
<td>people per store</td>
<td></td>
</tr>
<tr>
<td>Movie Theater</td>
<td>8,000 to 9,000</td>
<td>Located at least 4 to 5 miles from another theater (film zone)</td>
</tr>
<tr>
<td></td>
<td>people per screen</td>
<td></td>
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Imagine you had to leave SE Bend to go live on a South Sea Island. You return in 20 years, and the SE Area Plan, has been successfully implemented. You really like what you see. What do you see?
NEXT STEPS

BEND TRANSPORTATION AND LAND USE PROGRAM
Southeast Area Plan Work Plan and Process

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SE AREA PLAN

Old Farm, SE Bend, Old Farm