

CITY OF OREGON CITY EQUITABLE HOUSING

SCOPE OF WORK

Revised July 10, 2017

Task 1 (Milestone 2). Project Initiation, Public Engagement and Information Materials

The City will provide the Consultant with background information including the grant scope of work, development criteria, known barriers and opportunities, processes, fees, and other policy information associated with project goals. The consultant will hold a kick-off meeting with the City project team to review required background information and grant tasks, clarify desired outcomes, roles and responsibilities, communication protocols and stakeholder groups and representatives.

The consultant will outline a project management approach and schedule for preparing and reviewing materials with advisory teams. City staff will have one week to review draft material and provide comments to consultant before material available to the public or finalized. Biweekly project management phone calls throughout the process between the consultant and City project managers will be used to track progress on key tasks and deadlines, identify unanticipated issues and develop alternative approaches as needed. The consultant will prepare monthly progress reports and invoices that describe the activities undertaken, estimate the percent completion of each task, and track expenditures and hours.

Project Advisory Team

Public Involvement will be primarily through a Project Advisory Team (PAT), which will be selected and appointed by the Mayor. The PAT will meet up to five (5) times during the course of the project. Selection of the PAT will be through an application process administered by the City to include a variety of positions including: City Commission (1), Planning Commission (1), Citizen Involvement Committee (2), Oregon City Resident (2), Single-Family Developer Interest (1), Multi-Family/Mixed Use Developer Interest (1), Business Community (OC Chamber, Main Street or OC Business Alliance) (1), At large (Youth, Elderly, Working Family) (3) and Technical Advisory Team (TAT), a developer of regulated affordable housing (1) and, an organization representing low income families and/or communities of color (1), and one at large position to be filled if needed based on any additional needs.

Technical Advisory Team

A Technical Advisory Team (TAT) of experts will also be formed and appointed by the Mayor. The TAT will meet up to five (5) times over the course of the project. Selection of the TAT will be through a recruitment process administered by the City to include a variety of positions including: Oregon City Building Division (1), Oregon City Economic Development Department (1), Oregon City Public Works (1), Clackamas County Health, Housing and Human Services (H3S) (1), Affordable Housing Developer - Northwest Housing Alternatives (1), Metro (1), and one at large position to be filled if needed based on any additional needs. The city project manager will also communicate with TAT members outside of meetings via phone and email. PAT and TAT meetings will be held consecutively on the same day whenever possible.

Public Engagement Methods

The success of this project is dependent on successful integration with a variety of community members through various methods throughout the course of the project. The following engagement methods shall occur:

- Project Website
- Kick-off Meeting
- 6 Meetings (including kick-off meeting) with the Project Advisory Team
- 5 meetings with the Technical Advisory Team
- 2 Citizen Involvement Committee (CIC) dates (one will be City only)
- 2 Public Open House
- 3 Online Surveys (designed by consultant and surveys and website administered by City)
- 5 (30 minute) stakeholder interviews
- 2 Extra Meetings

Milestone 2 Consultant Deliverables:

- a) Kickoff meeting
- b) Scope refinement and project schedule including detailed approach to the decision making process: including schedule for completion of all memoranda and deliverables for Milestones 3-10.
- c) Public involvement outline, schedule and plan to include a commitment to prepare agendas and presentation materials for PAT and TAT meetings and meeting summaries, PAT and TAT guidance documents including meeting procedures and consensus process, for up to five (5) PAT meetings and five (5) TAT meetings, with attendance and facilitation at five (5) PAT and five (5) TAT meetings.
- d) Informational materials for City website and other community engagement activities

Milestone 2 City Deliverables:

- a) Background information including code regulations, processes, fees, preferred and regularly scheduled meeting dates, etc.
- b) Website Development
- c) Application Process for PAT positions / Recruitment for TAT positions
- d) Work with Consultant to finalize PAT and TAT positions: appointment by Mayor
- e) Advertise Meetings / Providing meeting facilities, food, refreshments, copies
- f) CIC Meeting

Milestone 2 Schedule: Months 1-2, due end of August 2017.

Task 2 (Milestone 3). General Code and Policy Audit

Consultant will prepare a Code and Policy Audit for review by City staff and members of the PAT and TAT to identify priority policies and code provisions to be targeted amendments and optional approaches to amendments, where applicable. The consultant shall as an initial step in the code audit solicit comments on the City's codes and policies from identified developers of single family housing, multi-family housing, ADU, cottage, and regulated affordable housing. Following review of the Code and Policy Audit, Consultant shall prepare proposed Policy and Code amendments.

The consultant will interview development professionals to get specific, detailed feedback about particular code sections and policies as they impact development of a range of housing types. For broader context, the consultant will consider work being undertaken by Metro's Build Small Coalition and similar efforts that analyze regulations across the Metro region, to take advantage of regional attention and work around equitable housing issues for inspiration and specific insights into opportunities as well as best practices for regulating housing.

Milestone 3 Consultant Deliverables:

- a) Code Audit Report Outline (Memo #1) – Initial memorandum which may include a menu of potential local regulatory barriers, constraints and incentives for equitable housing, including but not limited to processes, standards, fees, etc.
- b) Interview questions
- c) Interview results to be incorporated into Code Audit Report
- d) Code Audit Report – Draft #1 – Building on (a) above, this report will be prepared for initial review by staff, pending circulation to PAT and TAT for feedback and lead to (c) below.
- e) Code Audit Report – Draft #2 – Targeted memorandum based on PAT and TAT feedback documenting specific barriers and constraints for implementing equitable housing in Oregon City, including analysis of code regulations, processes, fees, etc. and a comparison to other jurisdictions.
- f) PAT Meeting #1
- g) TAT Meeting #1
- h) Code Audit Report – Draft #3 – Final Audit

Milestone 3 City Deliverables:

- a) Review, comment, and provide direction.

Milestone 3 Schedule: Months 3-4, due end of September 2017.

Task 3 (Milestone 4). Code and Policy Amendments – Part 1

The Code and Policy Amendments will be accomplished in 3 parts, listed in the Metro/Oregon City IGA as Milestones 4 through 6. The consultant will group regulatory and policy updates into three policy areas: zoning, engineering and economics.

Milestones 4 through 6 will consist of amending and reformatting portions of the development standards within the Oregon City Municipal Code to provide greater clarity to the development community and public. The Consultant, where possible and practical, will shorten or reformat, improve readability, remove unneeded or unclear standards, and consider new standards as they relate to the future development of equitable housing projects. The following portions of the Oregon City Municipal Code will be reviewed in this task: Chapters 12.04, 12.08, 13.12, 14.04, 15.48 and Titles 16 and 17. In addition, all other applicable City documents, plans, ordinances, and written policies will also be revised for clarity. The PAT will focus on broad concepts around equitable housing, while the TAT will focus on impacts of specific regulations with the specific regulatory drafting to be drafted outside of the PAT.

Milestone 4 Consultant Deliverables:

- a) Code Amendments Part 1 Memo (Memo #2). Memo #2 will provide and explain the initial direction for code and policy changes based on the Final Code Audit Report from Milestone 3.
- b) Amendments – Part 1, Draft #1
- c) PAT Meeting #2
- d) TAT Meeting #2
- e) Amendments – Part 1, Draft #2

Milestone 4 City Deliverables:

- a) Review, comment, and provide direction.

Milestone 4 Schedule: Month 4-5, Due end of October 2017.

Task 4 (Milestone 5). Code and Policy Amendments – Part 2

Milestone 5 will continue with the process of amending and reformatting portions of the development standards and provide more targeted policy recommendations that began in Milestone 4. This may include, but is not limited:

- a) Revisions of listed Permitted Uses by District
- b) Revisions to Dimensional Standards
- c) Revisions to specific Site Plan and Design Review Standards such as parking, architectural, landscaping, etc.
- d) Reformatting or simplifying the language of the development code
- e) Revisions to System Development Charges and other fees
- f) Revisions to review and processing timelines and procedures (e.g. Expedited reviews, Type I through Type IV land use processes)
- g) Identification of needed new housing types, and applicable standards
- h) Identification of zoned areas throughout the City with greatest potential for construction of needed housing types, in anticipation of Milestone 7, Equitable Housing Sites
- i) Other revisions as needed

The consultant will deploy an online survey (and hard copy if deemed necessary by the City) to identify needed housing types among various population groups. The PAT will distribute surveys within their communities to expand reach of surveys. At their meetings, PAT and TAT meetings will focus on larger substantive concepts behind zoning code such as desired housing types and parking needs, rather than specific code language. Members also will review and comment

on sample “guides for development” to provide the consultant team with direction prior to drafting the Educational Materials in Task 7.

Milestone 5 Consultant Deliverables:

- a) Code and Policy Amendments Part 2 Memo (Memo #3)
- b) Amendments – Part 2, Draft #1
- c) PAT Meeting #3
- d) TAT Meeting #3
- e) Amendments – Part 2, Draft #2

Milestone 5 City Deliverables:

- a) Review, comment, and provide direction.

Milestone 5 Schedule: Months 5-6, due end of November 2017.

Task 5 (Milestone 6). Code and Policy Amendments – Part 3

Milestone 6 will finalize the process of amending and reformatting portions of the development standards, procedures and other policy recommendations from Milestone 5. The consultant will translate code and policy language into core concepts for PAT and TAT review. PAT meetings #4, #5 and #6 and TAT meetings #4 and #5 be combined into two longer meetings for cost savings and scheduling purposes. Prior to the PAT/TAT work sessions, the consultant team will provide draft materials for PAT/TAT review with a detailed guide for reviewing:

- Code Amendments Part 3 Memo
- Equitable Housing Sites
- Educational Materials

The guide will describe key aspects of each deliverable and questions for PAT/TAT members to consider. The consultant also will provide a mechanism for PAT/TAT members to submit comments prior to the work sessions. This process will help the consultant team and PAT/TAT members come prepared for in-depth discussions on these milestones.

Milestone 6 Consultant Deliverables:

- a) Code Amendments Part 3 Memo (Memo #4)
- b) PAT/TAT Review Guide for Tasks 5, 6 and 7
- c) PAT Meeting #4
- d) TAT Meeting #4
- e) Amendments – Part 3, Draft #1
- f) Amendments – Part 3, Draft #2

Milestone 6 City Deliverables:

- a) Review, comment, and provide direction.

Milestone 6 Schedule: Months 6-7, due end of January 2018.

Task 6 (Milestone 7). Equitable Housing Sites

Milestone 7 consists of the creation of a series of maps identifying equitable housing opportunities and detailed information supporting development of the properties. Such properties identified as opportunities for multifamily housing, duplex/triplexes, and Accessory Dwelling Units (ADUs), as well as other housing types which may not yet be permitted but which have been recommended as a consequence of the work completed in Milestones 3 through 6. Consultant will assist in identifying elements which should be mapped, including but not limited to: zoning, transit locations, employment centers, social services, sidewalk gaps, overlay districts and utility locations, etc. City staff will obtain mapping information as available and conduct the GIS analysis. The Consultant will advise on selection of target

areas, analysis methodology and assumptions, and the format of the resulting maps and report. The task will provide a base of information which will be shared with the public to encourage development of these sites.

Milestone 7 Consultant Deliverables:

- a) Review and comment on products prepared by City staff

Milestone 7 City Deliverables:

- a) Meeting to review methodology
- b) Comments on methodology
- c) Draft maps and summary report
- d) Review, comment, and provide direction.

Milestone 7 Schedule: Months 7-9, due end of February 2018.

Task 7 (Milestone 8). Educational Materials

Milestone 8 consists of producing educational materials to understand the housing options available and the associated approval processes and costs. The educational materials will easily identify the opportunities and processes for creating additional housing would provide transparency to the development community and public. This will include a list of items a developer or property owner would typically need to know in order to conduct due diligence, including all processes, potential fees, likely development exactions and dedications, types of consultants, permits and inspections needed, system development charges, and financing options if available.

Ultimately, these education materials need to be tailored to the various housing unit types that are envisioned to be developed as a result of the code and policy amendments, including but not limited to:

- Guides for constructing a new home, accessory dwelling units (ADUs), apartment or condo units, cottage housing, subdividing or partitioning land, converting commercial or office space to housing units, and converting a single-family home into a duplex or multi-family property.
- Plans and specifications for two model accessory dwelling unit types, including engineering and material lists. These will be made available to the public to utilize at no cost.
- Templates for developers to develop a pro-forma and track pro-forma of all project costs for due diligence.

The consultant will compile a development fees calculator that can help to inform developers' own pro forma assumptions about soft costs. The calculator can include a costs related to fees, processes, inspection, and potential incentives available to offset or finance these costs for eligible projects. The calculator also will provide “toggles” that estimate costs based on site size, project geography, project type, and other factors depending on the City's needs.

Milestone 8 Consultant Deliverables:

- a) Guides for Development – Draft #1
- b) Guides for Development – Draft #2
- c) Guides for Development – Final Draft
- d) Pro-Forma Template – Draft #1
- e) Comments from City Staff
- f) PAT Meeting #5
- g) TAT Meeting #5
- h) Pro-Forma Template – Draft #2

Milestone 8 City Deliverables:

- a) Review, comment, and provide direction.

Milestone 8 Schedule: Months 9-10, due end of March 2018.

Milestone 9. Final Memo, CIC and Public Meeting / Open House

Prior to beginning the formal review process by Planning Commission and City Commission, the consultant shall prepare and present all recommended policy and code amendments with a final summary memorandum and technical memorandum to the Citizen Involvement Committee (CIC) and in an informal public open house.

Milestone 9 - Consultant Deliverables

- a) Policy and Code Amendments Summary Memo (Memo #5) and Final Technical Memo
- b) Creation of materials and attendance at a CIC Meeting
- c) Creation of materials and attendance at an additional Public Meeting / Open House

Milestone 9 – City Deliverables

- a) Coordinate support and meeting space and resources
- b) Support for and attendance at CIC meetings and Open House

Milestone 9 Schedule: Months 10-11, due end of May 2018.

Milestone 10. Planning Commission and City Commission Hearings & Adoption

It is expected that a Legislative approval process, and potentially a Resolution may be needed to implement the recommendations of this project. The Legislative approval process is required to amend the Oregon City Municipal Code and includes mailing a postcard to all property owners within the Urban Grown Boundary, a meeting with the Citizen Involvement Committee and a series of public hearings before the Planning Commission and City Commission.

Milestone 10 - Consultant to attend and present during plan adoption:

- Pre-Application Conference (1)
- Planning Commission (PC) Work Session (1)
- Planning Commission (PC) Hearings (1)
- City Commission (CC) Work Session (1)
- City Commission (CC) Hearings (1)

Milestone 10 Consultant Deliverables:

- a) Attendance and presentation at up to four (4) PC and CC meetings and hearings
- b) Creating application materials for inclusion in a standard Legislative application, including responses to the applicable sections of the Oregon City Municipal Code and any other applicable criteria or document.
- c) Presentations and materials for review and adoption process
- d) Final Memorandum summarizing project, analysis and recommendations.

Milestone 10 City Tasks and Deliverables:

- a) Process Type IV Legislative application, including public notices and drafting of findings
- b) Review by City Attorney

Milestone 10 Schedule – Months 11-12, due end of July 2018, although hearing process may be longer.