



EXHIBIT A – AMENDMENT 1 SCOPE OF WORK

An Inclusive Planning Process to Define the Future Growth Plan for Bend

This Scope of Work details the tasks associated with the creation of the Bend Growth Plan which is a term used in the Bend City Council's 2025/2027 goals to describe the work, process, and deliverables detailed in this scope and work in future phases of the contract. The growth plan process is fundamentally about engaging in a broad based and inclusive community process to define common values, a shared vision, and the plans and policies that will guide Bend's growth to 2050. There are many technical steps described in this Scope of Work, but underpinning all of them is a public engagement process that is accessible, exciting, and meaningful. This is a planning process for Bend residents to define their future that will also satisfy the various state-level requirements cited throughout this scope.

The Bend Growth Plan Is an Integrated Workplan

The Bend Growth Plan is unique not because of the individual components it includes - all of which are required as part of the Oregon planning system - but because the City of Bend (the "**City**") is taking an integrated approach. This integrated approach will yield several benefits. First, a coordinated work plan is easier for the public to understand, track, and engage with. The engagement process defined in this scope is designed to allow the public to weigh in on a host of growth-related questions that impact multiple deliverables at once. Second, consolidating intensive analysis, technical modeling, and engagement will result in a more cost-effective process overall. Finally, the adopted plans and policies that are produced will be strategically aligned, internally consistent, and reinforce one other. The integrated approach described in this Scope of Work will complete eight statutorily required plans across five adoption packages and, more importantly, the coordinated approach will result in a broadly supported, consistent, and implementation-ready growth plan.

The work involved in completing the Bend Growth Plan will begin now but extend beyond the current biennium budget. This scope includes detailed descriptions of tasks and deliverables that will occur during this budget biennium. In order to provide a complete picture of the entire work plan for the Bend Growth Plan, an outline of future tasks that will occur in future biennium budget periods has been provided at the end of this scope.

The Scope of Work for the Bend Growth Plan organizes tasks into 5 Phases: *Mobilize, Frame, Plan, Strategize, and Adopt*.

The goals of **Phase 1 Mobilize** are to establish project management and governance bodies, project branding, and the full community engagement strategy; complete initial data gathering and analysis, policy context review, and select the primary modeling tool(s).

In **Phase 2 Frame** we will thoroughly understand current housing and economic conditions, quantify growth demand and land needs, and prepare early, illustrative VMT-related future growth scenarios to understand development implications.

In **Phase 3 Plan** we will co-create a shared Vision for future growth and co-design the future with the public in hands-on public workshops across the City; evaluate and compare different locations, patterns, and policy options using scenario planning tools; and decide on a preferred growth map for Bend. The engagement and analysis tasks in Phase 3 are substantial and will extend beyond the current budget biennium.

Phase 4 Strategize is focused on implementation and will translate the preferred growth map into concrete, adoption-ready plans with prioritized policies and investments, including specific strategies for housing production and a transportation improvement project list.

Phase 5 Adopt is the final step and will compile, finalize, and secure the official adoption of the final, biggest project deliverables, including the primary land use and transportation plans for the City (the Comprehensive Plan and the Transportation System Plan), specific land use efficiency measures, and any UGB expansions. During

1 MOBILIZE our team and prepare our community to envision the future

2 FRAME a shared understanding of future possibilities

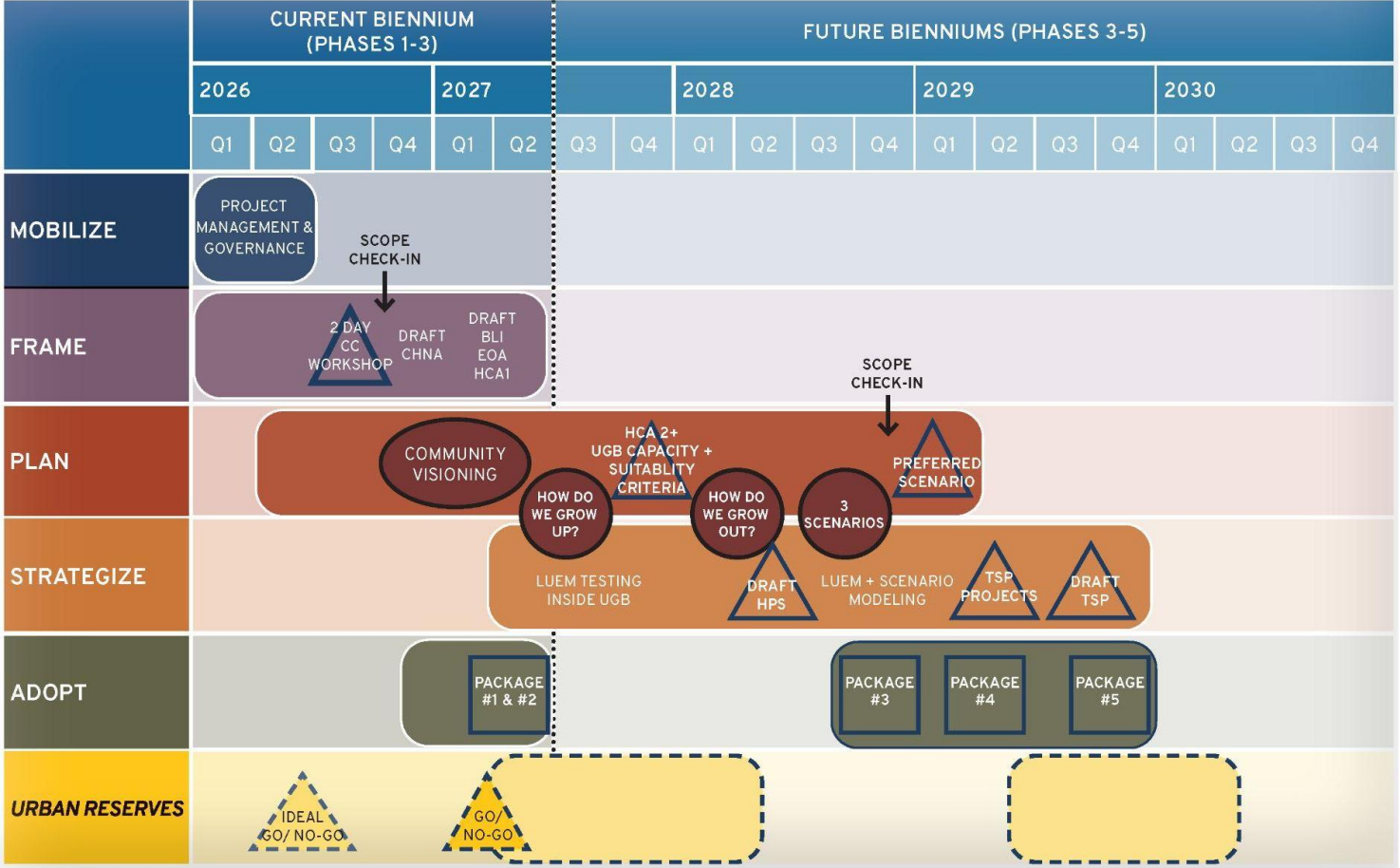
3 PLAN for how and where we want to grow

4 STRATEGIZE how best to achieve our plan

5 ADOPT policy changes and investments to realize our vision

previous phases, other key deliverables will be adopted and approved according to the Local Adoption Packages and State Sequential Review process outlined on page 5.

Project Schedule with Key Milestones



MAJOR CITY COUNCIL DECISION
LARGE EFFORT COMMUNITY ENGAGEMENT
ADOPTION PACKAGE HEARINGS

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Local Adoption Packages & Sequential State Review

Many of the deliverables associated with the Bend Growth Plan require formal adoption by City Council and approval by the State. The City is seeking sequential review (see Oregon Administrative Rules (OAR) 660-025-0185(2)) approval from the State to sequence and package most project deliverables. This Scope of Work reflects this sequencing and packaging of tasks that have finite deliverables to be adopted by the City; these have been grouped into individual Adoption Packages. The proposed sequencing and grouping of adoption products is intended to provide more certainty, maximize efficiency, and ensure integrated land use and transportation planning across deliverables. A Conceptual Adoption Package Framework is described below.

Adoption Package 1: Q1 2027

The **Contextualized Housing Needs Analysis (CHNA)** will develop a comprehensive understanding of the amount, type, and location of housing needed in Bend including an analysis of housing affordability, past discriminatory actions, and fair housing choice issues. It will be adopted by City Council resolution and reviewed by the Department of Land Conservation and Development (DLCD) under a segmented review and is estimated to be completed by **March 30, 2027**.

Adoption Package 2: Q3 2027

Adoption Package 2 is estimated to be completed by **September 30, 2027**. It will include three major deliverables: The **Housing Capacity Analysis (HCA) Phase 1**, The **Buildable Lands Inventory (BLI)**, and the **Economic Opportunities Analysis (EOA)**. This package of deliverables will identify the amount of growth Bend can expect and will need to plan for over the next 20 years including the types of housing units and jobs by type. This package of amendments will be adopted through a public hearing process with both the Planning Commission and City Council and ultimately reviewed and acknowledged by DLCD.

Adoption Package 3: Q4 2028

The **Housing Production Strategy (HPS)** is estimated to be completed by **December 31, 2028** and will be adopted by City Council Resolution, since it is not a land use decision, and ultimately reviewed and approved by DLCD. The HPS will identify the actions the City will take to support the production of needed housing. The technical work needed to support the HPS will take place concurrently with many of the deliverables associated with Adoption Package 4.

Adoption Package 4: Q1 2029

Adoption Package 4 is anticipated to be completed **by the end of March 2029**. It includes several land use decisions intended to implement the Bend Growth Plan and preferred growth scenario for the City. It will be adopted through a public hearing process with both the Planning Commission and City Council and ultimately reviewed and acknowledged by DLCD. It will include multiple deliverables including the adoption of the **HCA Phase 2** and tasks associated with **Urbanization and Growth Planning** that will identify **Land Use Efficiency Measures (LUEM)** and potential **UGB expansion areas** to provide for needed housing, employment and other urban uses such as public facilities, streets and roads, schools, parks and open space over the 20-year planning period.

This package of amendments will result in a completely redesigned **Bend Comprehensive Plan** as well as **Climate Friendly Area (CFA) Designation** and adoption of an updated Comprehensive Plan map that will guide all future development within the City's UGB.

Adoption Package 5: Q4 2029

Adoption Package 5 will update Bend's **Transportation System Plan (TSP)** to implement the Bend Growth Plan. The City Council will adopt the TSP into the new Comprehensive Plan by ordinance, following Planning Commission recommendation. It will ultimately be reviewed by DLCD review through the required post-acknowledgment plan amendment (PAPA) process. Adoption is anticipated **by the end of 2029**.

Transportation system components will be informed by earlier modeling and land use scenario integration associated with technical work to support Adoption Package 4 to ensure the preferred growth scenario does not increase VMT above baseline levels and positions the City to meet state-required regional performance targets for a successful TSP.

Contingency Task: Urban Reserves

One contingency task is adopting an **Urban Reserve** after establishing a new 20-year UGB and once the TSP is adopted. If the Bend City Council decides to move forward with an Urban Reserve, then the last remaining work on the project will include adopting a new Urban Reserve.

Phase 1: Mobilize

This phase will establish the foundational structure, governance, engagement strategy, and core analytical tools required for successful project execution, and ensure strategic alignment across the entire work plan from the outset.

Task 1 Project Management

Purpose: Coordinating an inclusive public process that will shape multiple technical deliverables requires a clear structure and system of project management in order to maintain momentum, public credibility, and legal integrity. The management approach described in the tasks below will support efficient coordination between the City and the Contractor, and define a process to solicit meaningful public input and facilitate City Council decision making at key milestones.

The tasks described below include project oversight and ongoing project management to support Phases 1-3 of the project that will occur in the 25-27 biennium. The Project Management Team (PMT) refers to a project management team consisting of key members of the Contractor's team and City staff.

Primary Legal Citations: 1.20.030 Bend Municipal Code; Oregon Revised Statute (ORS) 197.626(3); OAR 660-025-0185 for Sequential Review Proposal (Task 1.5).

Task 1.1 Project Oversight

The Contractor's project management team members will manage all aspects of the Contractor's work on the project including coordination with other team members, updating the project schedule, invoicing, budget tracking, and monthly project reporting. In addition, this task includes hours for the Contractor's project manager to review all draft and final deliverables to ensure a high standard of quality and analytical rigor. This task also includes hours for scope check-ins with the PMT at identified milestones within the first biennium.

Task 1.2 Project Kick-off Meeting

Key members of the PMT will prepare for and assemble for a virtual two-hour meeting at the beginning of the project to review the key tasks and schedule milestones for the first biennium period to ensure all team members understand and are in alignment on purpose. The kick-off meeting will clarify the project management roles and practices necessary to advance several technical and engagement related tasks concurrently. A priority for this meeting is to map out a coordinated 90-day workplan across all tasks to get the project work started quickly and efficiently.

Task 1.3 Project Management

Task 1.3.1 Project Management Team (PMT) Meetings

The Contractor will work with the City to establish a regular schedule of PMT meetings (assumed to occur bi-weekly). These PMT meetings will provide a regular venue for deliverable updates, problem solving, and ensuring alignment of work across multiple concurrent deliverables. Attendees will be decided based on the agenda for each meeting. Meetings may be hybrid or in person. The Contractor will prepare an agenda ahead of each meeting and summarize and share action items following each meeting.

Task 1.3.2 City-Led Project Management Resources

The City will also establish various project management resources to support the project including a project charter outlining City staff member roles and responsibilities, internal project management and executive management team meetings, a file sharing site (Microsoft Teams/SharePoint) and associated file naming structure, conventions, and project file templates and graphic standards for the Contractor's team to utilize to support the project. The City will also be responsible for ensuring all final deliverables made available to the public meet City and Federal ADA accessibility guidelines and requirements.

Task 1.4 Project Schedule

The Contractor will establish a project schedule that is consistent with the City's Sequential Review Proposal, as approved by DLCD. The Contractor will develop three draft schedule graphics for City review. It is anticipated that these three graphics will be established at onset of the project and then updated by the City as needed within the first biennium.

Task 1.5 Sequential Approvals Decision

The City will lead the local and state approvals process to secure a sequential review work program approval from DLCD (ORS 197.626(3); OAR 660-025-0185). For this task, the Contractor will participate in a review of DLCD's decision, suggest any changes that need to be made to the Contractor's proposal to meet the deliverables and dates included in DLCD's review, and adjust any project materials (e.g. project schedules) so DLCD's approval is fully integrated into the scope of work. The Contractor will provide the City with a summary of work program and timeline changes needed to conform to the DLCD sequential review work program decision. If this review identifies major discrepancies between the approved scope of work and DLCD's sequential approvals decision, then the Contractor and City may enter a more formal scope change process.

Task 1 Consultant Deliverables

- 1.1 Project Kick-Off Meeting including Agenda, action item summary, and preliminary work plan
- 1.2 Bi-weekly PMTs including agendas and action item summaries (assumes 1.5 PMTs per two weeks)
- 1.3 Review of City's Project Charter
- 1.4 Up to three draft schedule graphics in format editable by the City (Adobe Illustrator)
- 1.5 Up to three final schedule graphics in format editable by the City (Adobe Illustrator)
- 1.6 Review of DLCD's Sequential Review Decision
- 1.7 DLCD Decision and Scope Considerations Summary

Task 1 City Deliverables

- 1.1 Attendance at Project Kick-Off Meeting
- 1.2 Project Charter
- 1.3 Attend bi-weekly PMT meetings
- 1.4 Internal staff coordination
- 1.5 Sharepoint Site, File Structure, File Naming Structure
- 1.6 Project/File Templates (Powerpoint, Word (memo, report), flyer and social media post)
- 1.7 City Graphic Standards
- 1.8 Schedule graphic revisions/updates as needed
- 1.9 Identification of noticing requirements for each deliverable
- 1.10 Accessibility Compliance for all public-facing documents

Task 2 Early Data Gathering, Management, and Reporting Frameworks

See Task 2: Early Data Gathering, Management, and Reporting Frameworks from the original Contract.

Task 2.1 Data Management

See Task 2.1: Data Management from the original Contract.

Task 2.1.1 Data Management Plan

See Task 2.1.1 Data Management Plan from the original Contract.

Task 2.1.2 Data Wishlist

See Task 2.1.2 Data Wishlist from the original Contract.

Task 2.1.3 Data Inventory & Organizational Framework

See Task 2.1.3 Data Inventory and Organizational Framework from the original Contract.

Task 2.1.4 Data Schema

See Task 2.1.4 Data Schema from the original Contract.

Task 2.2 Project Spatial Data Portal

See Task 2.2 Project Spatial Data Portal from the original Contract.

Task 2.3 Community Impact Analysis

See Task 2.3 Community Impact Analysis from the original Contract.

Task 2.4 Project Basemaps & Cartographic Style

See Task 2.4 Project Basemaps and Cartographic Style from the original Contract.

Task 2 Contractor Deliverables

See Task 2 Contractor Deliverables from the original Contract.

Task 2 City Deliverables

See Task 2 City Deliverables from the original Contract.

Task 3 Modeling Tool Evaluation & Selection

See Task 3 Modeling Tools Evaluation and Selection from the original Contract.

Task 3.1 Understanding City Priorities and Constraints

See Task 3.1 Understanding City Priorities and Constraints from the original Contract.

Task 3.2 Modeling Tool Evaluation Memorandum

The Contractor shall prepare a memo comparing the advantages and disadvantages of different land use, transportation, climate, and demographic modeling tools for use in this project and future City projects. The Contractor shall review and provide suggested edits to the memorandum. The memorandum will include a discussion of various model capabilities to address both “must have” and “nice to have” performance measures and functions such as Climate Friendly and Equitable Community (CFEC) Division 12 Performance Measures and Targets, scenario-based transportation modeling functions and Vehicle Miles Traveled (VMT) per capita analysis, proforma analysis, and climate action plan metrics. A detailed list of modeling tool capabilities desired by the City is included in Task 8 of the detailed scope included in the City’s request for proposals number 26-2405 issued October 1, 2025 (the “RFP”).

The Contractor shall host an additional two modeling tool selection work sessions with relevant City staff and Contractor team members to help the City select a tool.

Task 3.3 Modeling Tool Training + Capacity Building

It is assumed that the Contractor will be the primary operator of the selected modeling tool(s) for the duration of the project. The Contractor will provide up to four training sessions for City staff to build internal city capacity to use the tools during the project and beyond. These sessions will coincide with key stages of project work in order to make the trainings relevant and practical. In addition, the Contractor will be available for up to 15 hours for on-call support to support modeling tool training, use, and capacity building during the first biennium.

Task 3 Consultant Deliverables

- 3.1 Summary of City modeling tool priorities and constraints
- 3.2 Facilitate up to four modeling tool selection work sessions
- 3.3 Draft and Final Modeling Tool Evaluation Memorandum
- 3.4 Facilitate up to four modeling tool training sessions
- 3.5 Up to 15 hours of on-call modeling tool support

Task 3 City Deliverables

- 3.1 Participate in up to four modeling tool work sessions
- 3.2 Review of Modeling Tool Evaluation Memorandum
- 3.3 Selection of modeling tool
- 3.4 *Participate in up to four modeling tool training sessions*

Task 4 Growth Context & Community Impact Analysis

This Task 4 (Growth Context and Community Impact Analysis) is a new and distinct task added under this amendment. It is separate and unrelated to Task 4 (Illustrative VMT Scenario Modeling and Evaluation) in the original Contract.

Purpose: A first step in defining where we want to go is understanding where we've been, how we got here, and where the path we are currently on is taking us. Understanding how Bend has grown over time and how demographic changes, our physical landscape, and human practices have shaped where we are today allows us to identify mistakes we want to fix or opportunities we want to leverage when making plans for the future. Benchmarking where we are now and the trajectory our current policies and investments put us on is necessary to compare the effectiveness of different approaches during the scenario testing phases of this process. This task will provide a foundational set of spatial analyses (maps and visual stories) that will be used to support and enhance several subsequent parts of the process. The analyses described below will result in a visually rich set of maps and diagrams that are broadly accessible to the public, and help to establish a shared understanding of Bend's past growth and "what makes Bend, Bend." Establishing this shared understanding is a key first step in any public process focused on planning for the future.

A key component of this task is to establish a framework to evaluate the community impact of the project and policies considered as part of it. Considering community impact means analyzing how people are affected by decisions on growth, land use, transportation, housing, and infrastructure including an analysis of who benefits, who is burdened, and where systemic barriers exist. The Community Impact Analysis will integrate the legal requirements of OAR 660 Divisions 8 and 12 across disciplines which can then be applied to major deliverables and engagement activities across the project into an integrated community impact reporting process.

Primary Legal Citations: OAR 660-012-0125, 660-012-0130, 660-012-0135, 660-008-0075, 660-008-0200

Task 4.1 Community Growth Context

This task includes a variety of methods to understand Bend's growth context including an urban morphology assessment, developing a spatial understanding of Bend's existing policies and plans, as well as identifying drivers of change that will be used in a future exploratory scenario planning process. Key findings from Tasks 4.1.1-4.1.4 will be summarized into a technical memo, an interactive online Storymap, and slide deck in Task 4.4.

Task 4.1.1 Urban Morphology Assessment

The Contractor shall use Geographic Information System (GIS) datasets, historical maps, and other readily available data sources to examine how the community has evolved and urbanized over time, and identify constraints and opportunities that should be considered as part of planning for the future. This will illustrate how the interaction between people and environment have shaped and been shaped by each other, showing up in unique and changing patterns of development, urban form, and travel patterns. The assessment will:

- Map the primary natural systems that define Bend, and show how they shaped growth and have been shaped by growth over time
- Map the historic evolution of land use and physical form, and the relationships between landform, transportation, and growth
- Identify constraints and opportunities associated with local ecology and natural systems that should be considered when making plans for the future

Task 4.1.2 Current Policy Trajectory

- a. **Policy Framework Memo (final from City):** The City will be responsible for developing an Existing Plans and Policy Framework Memorandum that will identify existing plans and policies as well as stated policy goals, intentions, and programs that may not yet be memorialized into adopted plans such as Council Goals, prioritized Climate Friendly Areas, Urban Renewal Areas, infrastructure plans and investments, and other relevant incentive programs and new policy initiatives (neighborhood commercial, etc).
- b. **Growth Policy Spatial Framework:** The Contractor shall review the City's Existing Plans and Policy Framework and create a spatial representation of the policy framework by mapping all relevant and related current policies to show effective entitlements and other policy initiatives across the City. The methodology used to create a spatial representation of the policy framework will be documented in the memo summarizing all work in this task (Task 4.1.5).

Task 4.1.3 Drivers of Change Assessment

The Contractor shall review up to five recent strategic planning or research documents and conduct up to ten interviews with local and regional experts to identify future-looking trends that could be major drivers of change in the future. The purpose of this task is to help better understand the potential "critical uncertainties" facing the City associated with the economy, demographics, federal and state policies, and climate change such as localized climate impacts like wildfire and smoke risk.

Identifying these drivers of change will inform the themes explored in the scenario planning stages of this process and help define the evaluation metrics that are used to evaluate and compare scenarios. They can also inform the organization, topics, and policies included in the updated Comprehensive Plan.

A prioritized list of documents and interviewees will be finalized in collaboration with the City. Data and trends identified in recently completed projects, like the City's Economic Development Strategy, and data analysis from other tasks in this project, like the CHNA, could be part of what is reviewed and summarized by the team. Interview summaries will be included in a technical memo in Task 4.1.5.

Task 4.1.4 Climate Change and Risk Assessment

The Contractor shall conduct a review of existing research on proposed climate change impacts to Bend and the region (including the Bend Community Climate Action Plan and other relevant research and plans) and interviews conducted as part of Task 4.1.3.

The Contractor shall map previous wildfire extents in and around the City and summarize any available public agency research on the wildfire risk present in existing forests (including wildfire urban interface risk mapping) along with forecasts for changes in vegetation, declining snowpack and associated water levels, and drought as a result of climate change. A summary of findings will be included in the Growth Context Technical Memo in Task 4.1.5.

Task 4.1.5 Growth Context Technical Memo

The Contractor develop a technical memo that summarizes sources and findings from Tasks 4.1.1 to 4.1.4.

Task 4.2 Community Impact Spatial Analysis

The Contractor shall develop a methodology to assess and evaluate Community Impact throughout the project which will be memorialized into a Community Impact Report as well as a Community Impact Framework that will influence technical analysis and engagement throughout the project.

Task 4.2.1 Community Impact Spatial Analysis Methodology

The methodology will identify a process to conduct demographic, spatial, and historical research and analysis to understand how current and past land use and transportation practices and investments have affected members of the community. The report will address rules for both Divisions 8 and 12 to meet the data and mapping requirements for the CHNA and the TSP Major Equity Analysis (MEA). Once a methodology has been established, the Contractor shall begin the data collection process to begin the analysis.

Task 4.2.2 Community Impact Spatial Analysis

Using the methodology established in the prior task, the Contractor shall complete a spatial analysis to evaluate community impact and identify key demographic and socioeconomic trends including a displacement and vulnerability analysis to identify communities most at risk of housing instability, neighborhood change, or exclusion as Bend grows and redevelops including identification of equity priority areas for future planning, engagement, or anti-displacement tools.

Task 4.2.3 Community Impact Draft and Final Report

The Contractor shall draft a Community Impact Report which will be a mapping tool and a written document consisting of demographic analysis, spatial analysis, and historical research to analyze how current and past land use and transportation practices and investments have affected members of the community and address rules for both Divisions 8 and 12. This will meet the data and mapping requirements for the CHNA and the TSP MEA.

The City will be responsible for providing written documentation based on the City's historical research of past harms. The Contractor shall integrate this written documentation into the final report.

Once the City reviews the report and provides directive comments for changes, the Contractor shall develop a final Community Impact Report. Additional Community Impact Findings will be packaged into a storymap in Task 4.4.

Task 4.3 Community Impact Reporting Framework

Based on findings from the previous task, the Contractor shall develop a community impact reporting framework, rooted in both Division 12 and Division 8 requirements, to ensure that community impact considerations extend to all areas of project work.

Task 4.3.1 Review Reporting Frameworks

To develop the framework, the Contractor shall review two Community Impact and Equity Frameworks including the City's AIM Equity toolkit to help identify best practices, common formats, and key considerations.

Task 4.3.2 Draft Reporting Framework

Using the City's AIM Toolkit as a starting point, the Contractor shall evaluate opportunities to tailor the City's AIM toolkit to support the Bend Growth Plan project. The Contractor shall then draft a tailored reporting framework that integrates the Community Impact Spatial Analysis findings as well as Division 8 and 12 requirements. The framework will be used to consider how different members of the community are

impacted by the existing conditions, implications, and decisions within key technical deliverables throughout the project, and how to address, mitigate, or redress these impacts. The City will review the framework and ultimately approve it for future use.

Task 4.4 Growth Context & Community Impact Summary

The Contractor shall package together a summary of key findings and maps from the Growth Context and Community Impact Analysis into a final Growth Context & Community Impact Summary Storymap and slide deck. In addition, the Contractor prepare a Growth Context & Community Impact Summary One-Pager that summarizes purpose and key findings from Task 4.

Task 4 Consultant Deliverables

- 4.1 Review of Existing Plans and Policy Memo and Equity Analysis Historical Narrative
- 4.2 Growth Context Technical Memo
- 4.3 Community Impact Spatial Analysis Methodology Memo
- 4.4 Draft and Final Community Impact Report integrating City's Equity Analysis Historical Narrative and Community Impact Spatial Analysis
- 4.5 Review of other Community Impact Reporting Frameworks
- 4.6 Draft and Final Community Impact Reporting Framework
- 4.7 Growth Context + Community Impact Summary Storymap & Presentation including associated maps in both PDF and GIS formats acceptable to the City
 - Urban Morphology Assessment
 - Growth Policy Spatial Framework
 - Climate Change Risk Assessment
 - Community Impact Assessment
- 4.8 Growth Context & Community Impact One-Pager in English and Spanish

Task 4 City Deliverables

- 4.1 Existing Plans and Policy Framework Memo
- 4.2 Equity Analysis Historical Narrative
- 4.3 Review and comment on Growth Context Technical Memo
- 4.4 Review and comment on Draft Community Impact Spatial Methodology
- 4.5 Review of Community Impact Spatial Analysis Preliminary maps

4.6 Review and comment on Draft Community Impact Report

4.7 Review and approval of Community Impact Reporting Framework

4.8 Review and comment on Growth Context + Community Impact Summary Storymap

Task 5 Project Governance

Purpose: this task defines a structure to solicit input from a variety of local stakeholders and agency partners, and a process for City Council to provide regular project input, guidance, and make decisions.

The tasks below define a governance structure and regular touchpoints with Bend City Council, a Joint Committee Working Group (JCWG), and an Agency Advisory Group (AAG). Regular touchpoints with these groups will support the engagement and governance necessary to support and guide the project at key decision-making milestones.

Primary Legal Citations: Sections 1.10, 1.20.005-1.20.015 of Municipal Code, Oregon Revised Statute (ORS) 192.610-192.670

Local Ordinances: Ord. NS-2442, 2022; Ord. NS-2395, 2020; Ord. NS-2299, 2017; Ord. NS-2172, 2011; Ord. NS-2159, 2011 (these have to do with groups that are advisory to the City Manager)

Oregon Revised Statutes: ORS 192.610-192.670; ORS 162.690; HB 2805; Noticing: ORS 192.640(1) and (2)

Task 5.1 Joint Committee Working Group

The JCWG will be composed of representatives from existing City advisory bodies to bring perspectives from a variety of backgrounds and advisory body subject matter expertise together to provide input on this project.

Task 5.1.1 Working Group Charter

The City will be responsible for creating a Working Group Charter and will determine the participants, roles, bylaws, or operating procedures for the committee. The Contractor shall review the charter and suggest any recommended changes before finalizing.

Task 5.1.2 Working Group Meetings Facilitation and Attendance

The Contractor is responsible for creating meeting agendas and will provide facilitation services at meetings. The Contractor shall attend in-person and/or virtually at meetings

and prepare materials related to project deliverables. Material and presentation development is resourced in other tasks and deliverables.

The Contractor assumes five quarterly meetings will occur within the first biennium of the project. Additional meetings will be addressed through future scope modifications or utilization of governance and engagement contingency (see Task 21). The City will host working group meetings and prepare meeting summaries and notes. The City will also be responsible for providing stipends to working group members.

Task 5.2 Bend City Council Work Sessions

The Bend City Council will be actively engaged in this project through regular work sessions or separate meetings prior to formal adoption of deliverables. The Contractor shall prepare materials related to project deliverables, agendas, creating presentations, attending in-person and/or virtually, and assisting City staff with necessary follow-up materials to support these quarterly work sessions. The Contractor is assuming four quarterly Council work sessions may occur within the first biennium of the project. Additional work session participation will be addressed through future scope modifications or utilization of governance and engagement contingency (Task 21).

The City will be responsible for creating meeting recordings and minutes, scheduling meeting locations, public notices, and hosting the hybrid meeting format at City facilities. The Mayor will facilitate Council Worksessions.

Task 5.3 Agency Advisory Group

The City will host regular but infrequent informal meeting opportunities with representatives from special districts, state agencies, and Deschutes County to coordinate project deliverables throughout the project. The group will also be used as a technical sounding board as needed. The City will lead those meetings including agenda, facilitation and materials development. The Contractor shall provide support for meetings and meeting follow-up, if needed, will be addressed through use of Governance & Engagement contingency funds (Task 21).

Task 5 Consultant Deliverables

- 5.1 Prepare for, attend and facilitate up to five (5) Joint Committee Working Group meetings
- 5.2 Review of Joint Committee Working Group Charter
- 5.3 Prepare for and attend up to four (4) council work sessions

Task 5 City Deliverables

- 5.1 Committee Roles, Participants, Bylaws, Operating Procedures
- 5.2 Draft and Final Committee Charter
- 5.3 Meeting scheduling, logistics and notice
- 5.4 Stipends to City-appointed CoC members following the City's adopted [Advisory Body Stipend Program \(Policy No. ADM 2022-6\)](#) and as allowed under [Bend Municipal Code \(BMC\) 1.20.010.F](#).
- 5.5 Agency Advisory Group Meetings facilitation, scheduling, hosting, agenda preparation, meeting materials, and follow-up

Task 6 Community Engagement Program

Purpose: This task defines a holistic, coordinated Community Engagement Program that spans the entire Bend Growth Plan. The Engagement Program is designed to educate and involve the community in an integrated way across all growth-related topics over the life of the project, while intentionally prioritizing inclusive and accessible engagement for communities that have historically been underrepresented in planning processes. This task establishes strategies, tools, and systems that will guide engagement across the project. Phase-specific Engagement Action Plans and periodic project and engagement summaries will translate the program into targeted activities aligned with key project milestones and deliverables.

Primary Legal Citations: Oregon Administrative Rule (OAR) 660-012-0120 - 0135, OAR 660-008-0075

Task 6.1 Draft Community Engagement & Communications Strategy

The City will develop a draft Community Engagement and Communications Strategy for the project. The draft will include a demographic analysis, engagement goals and metrics (for Council consideration and confirmation), engagement decision making process, key messages, as well as engagement methods, tools and tactics including online communication tools and a social media strategy. The Contractor shall ultimately be responsible for finalizing the Strategy.

Task 6.1.1 Evaluation of Communication Engagement Tools and Methods

See Task 1.1: Communications Engagement Methods, Tactics, and Tools from the original Contract.

Task 6.1.2 Community Impact Engagement Framework

See Task 1.2 Community Impact Engagement Framework from the original Contract.

Task 6.2 Final Community Engagement & Communications Strategy

The Contractor shall finalize the Community Engagement & Communications Strategy incorporating any identified new tools, methods, equitable engagement, and community impact framework considerations.

Task 6.2.1 Engagement & Communications Worksession

The Contractor shall lead another follow-up worksession with City Staff and the Communications and Engagement Department to finalize any additional tools and/or methods for inclusion in the City's Community Engagement and Communications Strategy.

Task 6.2.2 Final Community Engagement & Communications Strategy

The Contractor shall finalize the Engagement and Communications Strategy in collaboration with the City, incorporating any new and selected tools from Task 6.1.1 and the Community Impact Engagement Framework from Task 6.1.2 as well as any Key Messages developed to support the project. The Contractor shall format the final strategy into a graphic layout. Deployment of any tools not already included within this scope of work will need to be authorized by the City through the use of Engagement Contingency funds.

Task 6.2.3 Strategy Summary

The Contractor shall develop a concise public-facing summary of Engagement and Communications Strategy in English and Spanish.

Task 6.3 Engagement Action Plans

Building from the final Community Engagement and Communications Strategy, the Contractor shall prepare up to two phase-specific Engagement Action Plans aligned with key milestones within the first biennium. Each Engagement Action Plan will translate the overarching Engagement Strategy into a clear, implementable roadmap identifying

target audiences, outreach methods, engagement tools, materials, roles, and timing for the applicable project phase.

Across all phases, it is anticipated that in-person engagement will be primarily led by City staff, with the Contractor attending and facilitating engagement activities as specified in each Engagement Action Plan and this scope of work. The Contractor is responsible for preparing engagement materials and coordinating Spanish translation and interpretation services, as further described in related engagement tasks.

Each draft and final Engagement Action Plan will include a concise public-facing executive summary in English and Spanish describing the purpose, focus, and planned engagement activities for the applicable phase.

Task 6.2.1 Action Plan #1: Community Visioning

The first Engagement Action Plan will guide outreach and engagement for the Community Visioning phase of the project which is further discussed in Task 15, with a particular emphasis on reaching underrepresented and historically marginalized communities. Engagement activities outlined in this Action Plan will be structured to satisfy applicable OAR Division 12 (Transportation System Plan) and OAR Division 8 (Contextualized Housing Needs Analysis, Housing Production Strategy, Housing Capacity Analysis) requirements specifically OAR 660-012-0120 - 0135, OAR 660-008-0075. Targeted engagement in this phase of the project will inform subsequent phases of work, including economic, housing, and policy-related analyses. Engagement may include a combination of broad community outreach (e.g., pop-ups, workshops, passive installations, tabling) and focused engagement activities (e.g., small-group focus groups, interviews, and participation in community-based organization meetings).

Task 6.2.2 Action Plan #2: Scenario Planning and Preferred Growth Scenario

The second Engagement Action Plan will describe engagement activities supporting the Urbanization and Growth Planning Scenario Planning Process, including outreach designed to inform and refine a preferred growth scenario for Bend through 2050. This Action Plan will identify key audiences, engagement methods, and timing associated with reviewing and testing alternative growth scenarios and building community understanding and support for a preferred approach. *Note that the majority of engagement activities identified in Action Plan #2 will occur in the 2027-2029 biennium, however planning and preparation for those engagement activities is anticipated to occur in the current 2025-2027 biennium.*

Task 6.4 Project Branding, Key Messages, and Project Website

The Contractor shall facilitate up to five meetings with the City's project team and Communications and Engagement Department on project branding and key messaging.

Task 6.4.1 Project Branding

The City will design a project logo and project name for external use. The Contractor shall review and provide one round of feedback on draft logo concepts and project names for further refinement. The City will provide digital files of the final logo (in English and Spanish) to the Contractor for use on project materials, and provide a brief brand style guide to establish consistent and accessible logo use, fonts, and colors.

Task 6.4.2 Branding and Key Messages Collaboration

The City will lead development of project branding, title, logo, and key messages to support the project and may consult with a public relations firm to do so. The Contractor shall review and provide one round of consolidated feedback on draft messages to the City's project team and Communications and Engagement Department. Final key messages will be integrated into the Final Community Engagement & Communications Strategy.

Task 6.4.3 Project Website

The City is responsible for building and maintaining a project website/webpage that includes a project overview and timeline, important contacts, opportunities to get involved, updates on the project's status, and the ability to view or download documents. The Contractor shall provide one round of review and comments for major website updates at up to three key milestones.

Task 6.5 Engagement Feedback

Task 6.5.1 Engagement Feedback System

The Contractor shall develop a system for engagement documentation and feedback to be used by both the City and the Contractor when conducting any engagement activities. This tool may be a shared database or spreadsheet for the purpose of tracking and categorizing feedback from various sources and inputs. In addition, the tool will be designed with specific consideration of Division 8 and 12 requirements (OAR 660-012-0120 - 0135 and OAR 660-008-0075) to ensure that the City will maintain required documentation from specific targeted and under-represented groups.

Task 6.5.2 Engagement Feedback Responsibilities

Both the City and the Contractor will utilize the Engagement Feedback System to summarize feedback. The Contractor is responsible for summarizing feedback for engagement tasks that the Contractor's team is leading and attending. The City will be responsible for summarizing feedback for engagement activities the City is leading.

Task 6.5.3 Interested Parties Database

The City will be responsible for maintaining an interested parties database and mailing list, and email lists for consistent communication throughout the project.

Task 6.6 Project and Engagement Summaries

The Contractor shall prepare concise summaries at key project milestones to provide transparent, ongoing updates to the public and decision-makers on project progress, engagement activities, and key decision points. The summaries will highlight work underway or completed across multiple topic areas, including housing, transportation, economic development, and related tasks. Summaries will also include a brief overview of engagement and governance activities conducted during the reporting period and integrate Community Impact considerations. The summaries will be designed for use across multiple City communication channels and formats to support accessible, consistent project updates. *Note: It is assumed that up to five project and engagement summaries may be developed in English and Spanish within the 2025-2027 biennium.*

Task 6.7 Translation and Interpretation Services

The Contractor shall provide Spanish-language translation and interpretation services for focused community outreach. Other language translation services, such as American Sign Language, will be managed and secured by the City or through the use of Engagement Contingency funds.

Task 6.8 Stipend Program Management

The Contractor shall oversee stipend distribution and management. All stipends will be documented in a tracking sheet to record delivery method, amounts, fees, and receipt status. The Contractor shall work with the City to follow any legal requirements, confirm stipend amounts, and confirm what engagement activities we can offer stipends for.

Task 6 Consultant Deliverables

6.1 Communication Tools and Methods Slide Deck

6.2 Worksessions with City Staff/Communications and Engagement Department (two total)

- 6.3 Review Draft Community Engagement & Communications Strategy
- 6.4 Draft and Final Community Impact & Equitable Engagement Framework Section of the Draft Community Engagement & Communications Strategy
- 6.5 Final Community Engagement & Communications Strategy, integrating City-led Project Key Messages
- 6.6 Graphic Layout of Community Engagement & Communications Strategy
- 6.7 Community Engagement & Communication Strategy Summary in English and Spanish (public-facing)
- 6.8 Two (2) Draft and Final Engagement Action Plans
- 6.9 Two (2) Engagement Action Plan Summaries in English and Spanish
- 6.10 Up to two (2) 1-hr Project Branding & Key Messages meetings with Communications and Engagement Department
- 6.11 Review and comment on City's Project Brand and draft Key Messages
- 6.12 Three rounds of review of City's project website/webpage
- 6.13 Develop and maintain Engagement Feedback Tracking Tool
- 6.14 Up to five (5) project and engagement summaries in English and Spanish
- 6.15 Spanish Interpretation & Translation Services (to support Action Plan #1)
- 6.16 Management and deployment of a stipend program
- 6.17 Stipend tracking sheet

Task 6 City Deliverables

- 6.1 Selection of Desired Methods and Tools including resource allocation to deploy engagement methods and tools
- 6.2 Draft Community Engagement & Communications Strategy
- 6.3 Review of Community Impact & Equitable Engagement Framework within Strategy
- 6.4 Final project name, logo and brand identity guide including Spanish project name and logo
- 6.5 Draft and Final Project Key Messaging, to be integrated into Final Communications & Engagement Strategy
- 6.6 Project material templates with chosen logo
- 6.7 Project website/webpage
- 6.8 Ongoing updates to Engagement Feedback Tracking Tool

6.9 Interested Parties Database

6.10 American Sign Language Interpretation, as needed

PHASE 2: FRAME

This phase will frame a shared understanding of today, quantify the growth we need to plan for, and engage with the City Council to understand their priorities for the future that should be the focus of this planning process.

Completion of Phase 2 will result in the adoption of Adoption Packages #1 (Contextualized Housing Needs Analysis) and Adoption Package #2 (Buildable Lands Inventory, Housing Capacity Analysis Phase 1, and an Economic Opportunities Analysis).

Task 7 Illustrative Land Use and Transportation Scenarios

Purpose: This task will prepare, model, and illustrate a series of land use scenarios that demonstrate the land use implications of complying with the state’s Vehicle Miles Traveled (VMT) reduction requirements. This task will also help the project team to understand major land use and transportation factors that influence VMT early on in the project. Creating illustrative (non-binding), future land use scenarios for Bend early in the project will allow the City Council and community to understand potential legal risks that may manifest years from now while also providing a more localized understanding of Bend’s opportunities and constraints. The scenarios developed and illustrated in this task will be further contextualized in Task 8 and become a key part of the material shared with City Council at the Workshops described in Task 9.

Primary Legal Citations: Oregon Administrative Rule (OAR) Chapter 660, Division 12

Task 7.1 Scenario VMT Sensitivity Testing

See Task 4.1 Scenario VMT Sensitivity Testing from the original Contract.

Task 7.1.1 Data Collection and Model Setup

See Task 4.1.1 Data Collection and Model Setup from the original Contract.

Task 7.1.2 Define Key Assumptions and Method

See Task 4.1.2 Define Key Assumptions and Method from the original Contract.

Task 7.1.3 Prepare TAZ-level GIS Files

See Task 4.1.3 Prepare TAZ-level GIS Files from the original Contract.

Task 7.1.4 Model Scenarios (assume 3 model runs)

The Contractor shall share the initial Transportation Analysis Zone (TAZ) level land use scenario inputs with City staff for review and facilitate a small group meeting to define key parameters and assumptions for developing up to two additional land use scenarios and up to two additional transportation network scenarios.

The Contractor shall develop travel model inputs for the new scenarios and run the models in coordination with the Oregon Department of Transportation's Transportation Planning and Analysis Unit (TPAU) to capture VMT and other model-wide results (e.g., mode shift).

Task 7.1.5 Summarize Model Findings

The Contractor shall develop draft and final presentation slides to help explain drivers of VMT within the model based on the findings from the model scenario evaluation. Results will include maps highlighting VMT by TAZ.

Task 7.2 Illustrative Land Use Scenarios

See Task 4.2 Illustrative Land Use Scenarios from the original Contract.

Task 7.2.1 Define Methodology for Land Use Scenario Translation

See Task 4.2.1 Define Methodology for Land Use Scenario Translation from the original Contract.

Task 7.2.2 CFA Assessment

The Contractor shall conduct one site tour and host two collaborative mapping worksessions with the City team to evaluate the CFA areas identified in the City's CFA study with the purpose of identifying potential study boundaries and options for primary, secondary, and abutting CFAs. Following the first work session, the Contractor shall evaluate redevelopment indicators of the surrounding CFA areas (parcel size, land to improvement ratio, etc) and develop a draft map of potential primary, secondary, and abutting CFA locations to review with the City's team. Taking a fresh look at potential primary and secondary CFA locations will help inform a refined allocation of future growth for scenario modeling. In addition, refined CFAs will be a primary input into the Infill Opportunity Areas (IOA) map in Task 17.3.3, which will be vetted publicly in the Growing Up workshops anticipated to take place at the start of the second biennium.

Task 7.2.3 Land Use Translation of TAZ Scenarios

The Contractor shall disaggregate the TAZ-level scenario files down to the parcel and building level using a set of Envision Tomorrow scenario tool parameters for up to three

scenarios. The goal is to develop a plausible, ground-level reflection for how the future growth could be accommodated on parcels within each TAZ. The team will isolate redevelopable and infill parcels, and convert the growth numbers from net densities into building-level assumptions.

Task 7.2.4 Scenario Visualizations

The Contractor shall develop a set of citywide heat map visualizations, subarea 3D visualizations, and eye-level photomorph visualizations (three sets each assumed) that will be used to help visualize the distribution, scale, impact, and assumed density for the three scenarios. Heat maps can be used to show the location and relative intensity of assumed future growth at a citywide scale. 3D subarea visualizations will illustrate how the urban fabric - including building scale and urban design - would need to change in familiar contexts, such as a portion of the Bend Central District (BCD) or the east side CFA. Eye-level photomorphs provide a before and after visualization of familiar locations from a pedestrian perspective making them accessible and understandable for a broad audience.

Task 7 Contractor Deliverables

- 7.1 Facilitate up to two meetings to define the set of TAZ-level scenarios, key parameters and assumptions for VMT modeling
- 7.2 VMT TAZ Summary Maps in .pdf and GIS file formats, highlighting areas with the highest VMT reduction potential (GIS layer with elasticity variable attributes for symbolizing)
- 7.3 Draft transportation modeling TAZ land use files (GIS) and maps for one initial scenario
- 7.4 Facilitate up to three meetings to agree upon a technical method and key assumptions for land use scenario translation
- 7.5 Summary memo of the combined technical method and assumptions for both the TAZ-level modeling and land use translation process
- 7.6 Three travel demand model runs
- 7.7 Two CFA Mapping Worksessions
- 7.8 Land Use Translation of three TAZ Scenarios (GIS and spreadsheets)
- 7.9 Draft and final Illustrative Land Use Scenario Findings slide deck
- 7.10 Heat map visualizations (three sets, citywide)
- 7.11 Plan view subarea visualizations (three sets)

7.12 Eye-level Photomorph visualizations (three sets)

7.13 Files associated with visualizations (likely Adobe Illustrator or Photoshop, Sketchup or similar)

Task 7 City Deliverables

7.1 Participate in up to one meetings to define VMT, transportation and land use assumptions

7.2 Participate in two CFA mapping work sessions

7.3 Review of Illustrative Land Use Scenario Findings slides

7.4 Review and comment on draft scenario visualizations

Task 8 Contextualize Scenarios and Understand Policy Implications

Purpose: This task provides an understanding of how the illustrative scenarios developed in Task 7 compare to where Bend is today and the trajectory of current policies. Utilizing the Growth Context and Community Impact Analysis work produced in Task 4, the team will summarize the scale of policy changes, investment increases, and community impacts that are implied by the illustrative VMT scenarios. This contextualization and comparative analysis completed in this task will be a primary source of presentation content for the Council Workshops described in Task 9 and help the project team frame key questions for Council discussion and input.

Primary Legal Citations: Oregon Administrative Rule (OAR) Chapter 660, Divisions 8, 9, 12, and 24 (Goal 10 Housing, Economic Development, Transportation, and UGBs)

Task 8.1 State Policy Framing

The Contractor shall provide a summary of the most relevant and impactful statewide rules that will influence the anticipated outcomes of the Bend Growth Plan, including new rules associated with the CFEC changes to State statutes. This will be provided in a draft slide deck summary.

Task 8.2 Planning Best Practices

The Contractor shall investigate, summarize, and share best practice approaches, policies, and results from up to four other peer communities that have achieved ambitious outcomes similar to those implied by the illustrative scenarios. The Contractor shall develop four case studies so Council can understand what policy options exist and the scale of impacts that could be achieved through different approaches. The findings

of this best practice research will be helpful for several parts of this project, including at the land use efficiency measure (LUEM) identification and testing stage and when considering policies to include in the Comprehensive Plan.

Task 8.2.1 Case Study Research

The Contractor shall conduct research to identify a priority set of up to four communities that have succeeded in implementing policy changes similar to those that may be needed to meet the goals of the Illustrative Scenarios and that can be used to identify planning best practices. Potential topic areas could include (but are not limited to and will be decided in consultation with the project team and City staff):

- Achieving substantial infill/redevelopment within multiple community nodes
- Reducing Vehicle Miles Traveled (VMT) per capita and shifting mode choice, particularly in growing communities
- Placemaking and urban form
- Climate, wildfire, resilience, and evacuation Planning
- Natural and recreational area planning (nature in the city)

Task 8.2.2 Case Study Interviews

The Contractor shall conduct up to four interviews with case study stakeholders, staff, and/or leaders to help identify best practices, policies, investments, and tools that were critical towards achieving results such as incentives, urban amenities, and infrastructure investments.

Task 8.2.3 Case Studies

The Contractor shall develop up to four case studies to summarize best practice policies and outcomes from other communities in the form of presentation slides and brief written summary memos.

Task 8.3 Illustrative Growth Scenario Gap Assessment

The goal of this task is to build on Tasks 8.1 & 8.2 to help Council understand the local policy and investment implications of the illustrative growth scenarios across multiple dimensions, including climate, market, mobility, and placemaking. This will evaluate where Bend is today, what trajectory it is on, and how that compares to the futures implied in the Illustrative Scenarios.

Task 8.3.1 Climate and Community Impact

Through planning and investment, the City has the ability to influence two of the most significant (and interrelated) contributors to climate impact: land use patterns and transportation choices. The Contractor shall summarize the implied climate and community impact of the scenarios and compare them to Bend today and historic trends with the goal of answering the following key questions:

- How different is Bend's current path towards reduced climate impacts from land use and transportation compared to the path implied by the illustrative scenarios?
- What kinds of community impacts are implied by the illustrative scenarios, and how do those compare to past harms? Which impacts could be negative and which could be positive?

The scenario modeling will estimate changes in VMT resulting from the location and development types assumed in the scenarios. Vehicular use contributes to climate impact through the emission of greenhouse gases. The assessment of community impact will be informed by the Community Impact Spatial Analysis created earlier, but could include an assessment of gentrification and displacement risk associated with the location of assumed growth in the scenarios or perhaps changes to new housing affordability that result from the mix of housing options implied by the scenarios.

Task 8.3.2 Market and Land Use Policies

The Contractor shall assess the market conditions implied by the scenarios and summarize the gap between the illustrative scenarios and Bend today considering the following key questions:

- What can today's market reasonably do in different areas, and how does that compare to the scenario results?
- What level of rent or sales price would be necessary to achieve the outcomes? In what comparable neighborhoods in Bend or other cities are these outcomes observed; why, and how? How do those rents compare to incomes and what does this imply about affordability?
- How do today's land use policies compare to what would be necessary to allow the market to build the implied land use patterns in the scenarios, and what level of additional entitlement and/or incentives could be necessary to support market feasibility?

Task 8.3.3 Mobility and Transportation System

The Contractor shall summarize the gap between the City's existing transportation system plan in comparison to the VMT goals of the Illustrative scenarios. The goal is to help the Council understand what kinds of transportation approaches, project types, and investments that may be needed to reach the VMT goals of the illustrative scenarios, and how those compare to the policies, project types, and investment levels outlined in the existing TSP. In addition, the Contractor shall identify transportation planning best practices and policy drivers that could guide future transportation planning, including transportation project prioritization, performance standards, measures, and targets. The key objective of this Task is to identify a framework for how the existing Bend TSP may need to be modified to meet new state requirements.

Task 8.3.4 Urban Amenities and Placemaking Investment

The Contractor shall evaluate what level of investment in urban amenities and placemaking it would take to achieve the scenario results in different areas, and how that compares to recent levels of public investment in areas like downtown and the BCD. The market potential of a location is a function of desirability, and a key way that Cities can influence desirability (and thus market potential) is through investments in high quality urban amenities and placemaking.

Task 8.4 Scenario Findings and Implications Presentation

The Contractor shall develop a slide deck that synthesizes interim deliverables developed in Task 8.1-8.3 to evaluate the gap between existing conditions, the trajectory of adopted policies, and the Illustrative VMT scenarios. The goal of this summary is to provide a clear understanding of the following questions: "How far are existing conditions on the ground today from the future implied by the illustrative scenarios? And how big of a lift is implied by the illustrative scenarios compared to the trajectory of our currently adopted policies?" Understanding these conditions relative to one another is important in order to understand the scale of local action and investment that is implied. This task will also summarize and share best practice policies and outcomes from other communities through case studies so Council can understand what options exist and the scale of impacts that could be achieved relative to goals and modeled results.

Task 8 Contractor Deliverables

- 8.1 Conduct up to four interviews to support Case Studies
- 8.2 Four Case Studies (in annotated slide format and summary memo)
- 8.3 Scenario and Policy Gap Findings Slide Deck:

- Climate & Community Impact
- Market & Land Use Policies
- Mobility and Transportation System
- Urban Amenities and Placemaking

Task 8 City Deliverables

8.1 Review of Scenario and Policy Gap Findings Presentation

Task 9 City Council Project Guiding Workshop

Purpose: This task defines the planning and preparation for an up to two day workshop with City Council to provide early input and direction on the Growth Planning process. The workshop is intended to accomplish several objectives. First, it will provide City Council with an understanding of the Bend Growth Plan process defined in this Scope, including the inclusive public engagement approach. In addition, it will provide a high level understanding of the state planning directives and implications of the illustrative VMT scenarios modeled in Task 7 and contextualized in Task 8. Lastly, this workshop is the first step in the Visioning process described in Task 15 and an opportunity for Council to share their highest priority values and goals that should shape the Bend Growth Plan project.

Task 9.1 Workshop Planning

The Contractor shall work collaboratively with the City to prepare an agenda, run of show, and meeting materials to support an assumed two-day workshop with the Bend City Council.

Task 9.1.1 Agenda and Logistics Planning

The Contractor shall work collaboratively with the City to prepare an agenda and logistics plan for the workshop.

Task 9.1.2 Run of Show & Facilitation Guide/Questions

The Contractor shall develop a run of show for the workshop that will include a facilitation guide and key questions that will be used to gather Council direction. Specific topics may be included to prompt discussion and solicit targeted guidance from Council, such as issues of future urban form and walkable neighborhood commercial, or building scale and form-based code considerations, or climate change resilience and

wildfire adaptation strategies. A preliminary outline of potential topics is listed below but will be decided in collaboration with City staff.

- Project Goals and Outcomes
- State Rules and Requirements
- Process, Roles, and Responsibilities
- Schedule, Key Milestones, and Decision Points
- Plan for Community Engagement and Visioning
- Growth Context and Trends Findings
- Illustrative Scenarios and Implication Findings
 - Climate and Community Impact
 - Market and Land Use Policies
 - Mobility and Transportation System
 - Urban Amenities and Placemaking
- Early Council Policy Direction to Guide Project
 - Priority Values, Goals, Outcomes
 - Input on Key Growth-related Topics

Task 9.2 Workshop Facilitation and Participation

The Contractor shall facilitate a two-day City Council workshop. Note: that the development of presentation material content is primarily resourced in Tasks 6-8.

Task 9.3 Workshop Feedback Summary

The Contractor shall prepare a workshop feedback summary that summarizes Council direction themes and any formal direction. Using the subsequent PMT meeting, the project team will reflect on Council feedback and determine if any necessary scope or work program changes are needed.

Task 9 Contractor Deliverables

- 9.1 Prepare for, participate and facilitate one (1) 2-day Council Workshop
- 9.2 Meeting agenda and run of show
- 9.3 Meeting materials and presentations, primarily resourced in Tasks 6-8
- 9.4 Council Workshop Feedback Summary

Task 9 City Deliverables

- 9.1 Review of Council Workshop agenda and materials
- 9.2 Council Workshop logistics, scheduling and notice
- 9.3 Review and provide comments on Council Workshop Feedback Summary

Task 10 Contextualized Housing Needs Analysis

Purpose: This task will result in a comprehensive understanding of the amount, type, and location of housing needed in Bend over the planning horizon. The tasks below describe the development and adoption of the Contextualized Housing Needs Analysis (CHNA). The CHNA will incorporate information from the Community Impact Analysis (Task 4). The CHNA will include analysis of housing affordability, past discriminatory actions, and fair housing choice issues.

Primary Legal Citations: Oregon Administrative Rule (OAR) 660 Division 8, OAR 660-008-0075

Task 10.1 Introduction to Contextualized Housing Needs Analysis

The Contractor shall produce a one-pager outlining the intended outcome and key drivers for the CHNA, using a format provided by the Contractor, that can be used for the City Council and at engagement events. The Contractor will translate the one-pager to Spanish.

Task 10.2 Contextualized Housing Needs Analysis Methodology Memorandum

The Contractor shall prepare a draft methodology memorandum that identifies the timeline and major steps involved in completing the CHNA consistent with the relevant OARs and major issues and methods and data needed to complete the HCA. The memorandum will identify Contractor and City roles, methods, and data needed to complete the task.

The Contractor shall ensure the methodology considers Community Impact Spatial Analysis Findings (from Task 4) which will be further addressed in Task 10.5. The methodology will discuss how community engagement from past engagements and from engagements in Task 15.2 will inform the CHNA analysis and results.

The City must approve the methodology memorandum before the Contractor engages on the subsequent subtasks outlined in this section.

Task 10.3 Contextualized Housing Needs Analysis Draft Report

The Contractor shall develop a CHNA that is consistent with state statutes and administrative rules and guidance. The Contractor develop the draft CHNA report, which will include an analysis of housing affordability, a City-led Equity Analysis Historical Narrative that identifies past discriminatory actions, fair housing choice issues, and consideration of Community Impact Spatial Analysis (Task 4) findings. The results of the CHNA will include input from focus groups and interviews (in Task 15.2) with people such as members of the BIPOC (Black, Indigenous, and People of Color) community, people with disabilities, people with low incomes, service providers for people experiencing homelessness, Tribal representatives, workforce service workers, LGBTQ (Lesbian, Gay, Bisexual, Transgender, or Queer) community members, people with disabilities, transit users, and those with limited English proficiency (LEP).

The CHNA will result in a description and identification of housing types, characteristics, locations needed to: remedy or mitigate identified fair housing issues and achieve fair housing choice; meet the City's housing production targets while affirmatively further fair housing; and inform HPS actions. It will include identification of the number of units needed to make progress towards achieving 30% of housing in Climate Friendly Areas.

Task 10.4 Early Identification of Potential Land Use Changes and Land Use Efficiency Measures

The Contractor shall begin to identify potential Land Use Efficiency Measures (LUEMs) to meet identified housing needs. The early assessment of potential Land Use Efficiency Measures will be influenced by engagement and include ideas generated through Community Visioning, discussions with members of the Committee of Committees and Bend City Council Worksessions, as well as the illustrative scenarios (Task 8). It will be supplemented with five interviews or a focus group with people in the development community.

Task 10.5 Contextualized Housing Needs Analysis Final Report

The Contractor shall prepare a final, adoption-ready report that addresses City and Council comments. Any final revisions necessary to address comments raised through the adoption and hearing process will be addressed in Task 14. Adoption Hearing and Support.

Task 10.6 Contextualized Housing Needs Analysis Community Impact Framework

The Contractor shall analyze the CHNA through the Community Impact Framework developed in Task 4 to consider how the CHNA will impact different members of the community. The Contractor shall then develop a Community Impact Summary that documents how the Community Impact framework analysis was used, how engagement feedback was integrated into the draft CHNA and how outcomes of major feedback themes identified through the Community Impact Analysis may be applied to future tasks and deliverables.

Task 10 Contractor Deliverables

- 10.1 CHNA Introduction One-Pager in English and Spanish
- 10.2 CHNA Methodology Memorandum
- 10.3 Draft CHNA Report
- 10.4 Memorandum describing potential LUEMs
- 10.5 Final adoption-ready CHNA Report that addresses City directed comments
- 10.6 CHNA Community Impact Summary in English and Spanish

Task 10 City Deliverables

- 10.1 Review and approval of CHNA Methodology Memorandum
- 10.2 Review Draft CHNA Report
- 10.3 Review memorandum describing potential LUEMs
- 10.4 Review of final adoption-ready CHNA Report that addresses City directed comments
- 10.5 Review of CHNA Community Impact Summary

Task 11 Buildable Residential and Employment Land Inventory

Purpose: This task will result in the creation of a single Buildable Lands Inventory (BLI) for both residential and employment lands, which will replace the 2016 Buildable Lands Inventory as Appendix J to the Bend Comprehensive Plan. The BLI will inform the conclusions of the Economic Opportunities Analysis and Housing Capacity Analysis.

The task also includes developing a Development-Ready Lands Inventory (DRLI) for residential land, as required by Oregon Revised Statute (ORS) 197A.210 which will be a necessary task to inform the the Housing Production Strategy, however this part of the analysis will not be adopted as part of the BLI Report that is adopted as part of the Comprehensive Plan. Per OAR 660-008-0185, the DRLI will be included with the submittal for the City's Housing Production Strategy.

Primary Legal Citations: Oregon Administrative Rule (OAR) 660-024-0050; OAR 660-008-0100; OAR 660-009-0015; ORS 197A.270

Task 11.1 Introduction to Buildable Lands Inventory

The Contractor shall produce a one-pager outlining the intended outcome and key drivers for the BLI, using a consistent format provided by the Contractor, that can be used for the City Council and at engagement events. The Contractor shall translate the one-pager into Spanish.

Task 11.2 Buildable Lands Inventory Methodology

The Contractor shall prepare a draft methodology memorandum which identifies the timeline and major steps involved in completing the BLI consistent with the relevant OARs; includes a recommended approach to completing the development-ready lands analysis based on Oregon Revised Statute (ORS) 197A.210 and identifies Contractor and City roles, methods and data needs to complete the task. The Contractor shall ensure the methodology considers Community Impact Spatial Analysis Findings (from Task 4) which will be further addressed in Task 11.5. The City must approve the methodology memorandum before the Contractor engages on the subsequent subtasks outlined in this section.

Task 11.3 Draft Buildable Lands Inventory Report

Task 11.3.1 Draft Buildable Lands Inventory Analysis

The Contractor shall develop a draft BLI report for residential and employment land consistent with state statutes and administrative rules and guidance. The Contractor shall develop a draft of the BLI analysis and work with City staff to provide comments on it. The City will research and provide an inventory of parcels with restrictive CC&Rs to the Contractor to incorporate into the draft BLI.

Task 11.3.2 Map Review

The Contractor shall prepare a draft BLI map and directions for a map review by internal and external stakeholders. City staff will be responsible for hosting two map review

worksessions. One internally with City staff, including current planners, to review and provide comments on the map.

Task 11.3.3 Draft Buildable Lands Inventory Report

Once the BLI analysis is revised to address map review and other city comments, the Contractor shall develop the draft BLI report. For residential land, the buildable land inventory will include vacant and potential redevelopment based on historical redevelopment trends. For employment land, the inventory must include suitable vacant and developed land designated for industrial or other employment uses. The draft report will be provided to the City for review and comment.

Task 11.3.4 Draft Development-Ready Inventory (DRLI) Report

The Contractor shall develop a draft DRLI, based on the BLI. The Contractor shall work with City staff to refine and revise the analysis of development-ready land and produce a report presenting the results of the development-ready land inventory. The draft report will be provided to the City for review and comment.

Task 11.4 Final Buildable Lands Inventory Report

Task 11.4.1 Final Buildable Lands Inventory Report

The Contractor shall prepare a final, adoption-ready report that addresses City and Council comments which will replace Appendix J of the Bend Comprehensive Plan, following City Council approval. Any final revisions necessary to address comments raised through the adoption and hearing process will be addressed in Task 14. Adoption Hearings and Support.

Potential redevelopment opportunities will be identified through discussions with staff and development of scenarios in Task 7 and Task 8.

Task 11.4.1 Final Development-Ready Inventory Report

The Contractor shall prepare a final DRLI Report that City and Council comments. This report may be adopted with the Housing Production Strategy. Any final revisions necessary to address comments raised through the adoption and hearing process will be addressed through a future contract amendment as part of the Adoption Hearings to support adoption of the Housing Production Strategy.

Task 11.5 Buildable Lands Inventory Community Impact Framework

The Contractor shall analyze the BLI through the Community Impact Framework developed in Task 4 to consider how the BLI may impact different members of the community. The Contractor shall then develop a Community Impact Summary that documents how the Community Impact framework analysis was used, how engagement feedback was integrated into the draft BLI and how outcomes of major feedback themes identified through the Community Impact Analysis may be applied to future tasks and deliverables.

Task 11 Contractor Deliverables

- 11.1 BLI Introduction One-Pager in English and Spanish
- 11.2 BLI Methodology Memorandum
- 11.3 BLI Analysis for City review
- 11.4 Draft Buildable Lands Inventory Report
- 11.5 Development-Ready Land Inventory Analysis for City review
- 11.6 Draft Development-Ready Land Inventory Report
- 11.7 Final adoption-ready Buildable Lands Inventory Report that addresses City directed comments
- 11.8 Final adoption-ready Development-Ready Land Inventory Report that addresses City directed comments
- 11.9 Buildable Lands Inventory Community Impact Summary in English and Spanish

Task 11 City Deliverables

- 11.1 Review and approval of BLI Methodology Memorandum
- 11.2 Draft CC&R Research and associated GIS layers
- 11.3 Review BLI Analysis
- 11.4 Review BLI Report
- 11.5 Review Development-Ready Land Inventory Report
- 11.6 Review of BLI Community Impact Summary

Task 12 Economic Opportunities Analysis

Purpose: This task will result in the development and adoption of an Economic Opportunities Analysis (EOA) for the City. The EOA will identify the City's needs for employment land and sites in alignment with a newly adopted Target Sector Analysis received and approved by the Bend City Council. The EOA will incorporate information from other analysis by the City, including the City's upcoming strategic plan for economic development, information about the City's Urban Renewal Districts, and the City Council goal about economic prosperity. The final product will replace the City's current EOA as Appendix E of the Bend Comprehensive Plan.

Primary Legal Citations: Oregon Revised Statute (ORS) 197.712(2); Oregon Administrative Rule (OAR) Chapter 660, Division 009

Task 12.1 Introduction to Economic Opportunities Analysis

The Contractor shall produce a one-pager, using a format provided by the Contractor, outlining the intended outcome and key drivers for the EOA that can be used for the City Council and at engagement events. The Contractor shall translate the one-pager into Spanish.

Task 12.2 Economic Opportunities Analysis Methodology Memorandum

The Contractor shall prepare a draft methodology memorandum that identifies the timeline and major steps involved in completing the EOA consistent with the relevant OARs, major issues and methods and data needed to complete the EOA identifies Contractor and City roles, methods and data needs to complete the task. The Contractor shall ensure the methodology considers Community Impact Spatial Analysis Findings (from Task 4) which will be further addressed in Task 12.5. The City must approve the methodology memorandum before the Contractor engages on the subsequent subtasks outlined in this section.

Task 12.3 Economic Opportunities Analysis Draft Report

The Contractor shall develop an EOA that is consistent with state statutes and administrative rules and guidance. The Contractor shall develop the draft EOA report. The EOA will identify the need for sites and acreages of employment land. Subsequent work for Task 17 will address how this need will be met through Land Use Efficiency Measures (LUEMs) related to housing and employment, and a potential Urban Growth Boundary (UGB) expansion in Adoption Package 4. Therefore, adopting the EOA with the Sequential Approvals package including the Buildable Lands Inventory (BLI) and

Phase 1 of the Housing Capacity Analysis (HCA) will set the stage for addressing the total 20-year land needs of the City alongside one another in the PLAN phase (Phase 3) of the project.

Task 12.4 Economic Opportunities Analysis Final Report

The Contractor shall prepare a final, adoption-ready report that addresses City and Council comments which will replace Appendix E of the Bend Comprehensive Plan, following City Council approval. Any final revisions necessary to address comments raised through the adoption and hearing process will be addressed in Task 14. Adoption Hearings and Support.

Task 12.5 Economic Opportunities Analysis Community Impact Framework

The Contractor shall analyze the EOA through the Community Impact Framework developed in Task 4 to consider how the EOA may impact different members of the community. The Contractor shall then develop a Community Impact Summary that documents how the Community Impact framework analysis was used, how engagement feedback was integrated into the draft EOA and how outcomes of major feedback themes identified through the Community Impact Analysis may be applied to future tasks and deliverables.

Task 12 Contractor Deliverables

- 12.1 EOA Introduction One-Pager in English and Spanish
- 12.2 EOA Methodology Memorandum
- 12.3 Draft EOA Report
- 12.4 Final adoption-ready EOA Report that addresses City directed comments
- 12.5 EOA Community Impact Summary in English and Spanish

Task 12 City Deliverables

- 12.1 Review and approve EOA Methodology Memorandum
- 12.2 Review draft EOA Report
- 12.3 Review final adoption-ready EOA Report
- 12.4 Review of EOA Community Impact Summary

Task 13 Housing Capacity Analysis Phase 1

Purpose: This task will result in the development and adoption of an Housing Capacity Analysis (HCA) for the City. This HCA will be Phase 1 of the HCA and intended to determine the baseline development capacity of the existing Urban Growth Boundary (UGB) and identify potential capacity shortfall. Phase 1 of the HCA covers the requirements under Oregon Revised Statute (ORS) 197A.270(1)-(4), primarily determining capacity and housing need. The HCA Phase 2 (Task 16) covers the requirements under ORS 197A.270(5)-(6), addressing the actions (Land Use Efficiency Measures (LUEMs) and UGB expansion) to accommodate needed housing.

The HCA will build from a draft HCA that was completed in 2023, incorporating updated information into the HCA and complying with new Goal 10 administrative rules.

Primary Legal Citations: OAR 660-008-0100, ORS 197A.270(1)-(4)

Task 13.1 Introduction to Housing Capacity Analysis (Phase 1)

The Contractor shall produce a one-pager, using a Contractor provided template, outlining the intended outcome and key drivers for the HCA that can be used for the City Council and at engagement events. The Contractor shall translate the one-pager to Spanish.

Task 13.2 Housing Capacity Analysis Methodology Memorandum

The Contractor shall prepare a draft methodology memorandum that identifies the timeline and major steps involved in completing the HCA consistent with the relevant OARs, major issues and methods and data needed to complete the HCA identifies Contractor and City roles, methods and data needs to complete the task. The Contractor shall ensure the methodology considers Community Impact Spatial Analysis Findings (from Task 4) which will be further addressed in Task 13.5. The City must approve the methodology memorandum before the Contractor engages on the subsequent subtasks outlined in this section.

Task 13.3 Housing Capacity Analysis Draft Report

The Contractor shall develop an HCA that is consistent with state statutes and administrative rules and guidance. The Contractor shall develop the draft HCA report, which will build from the allocation of needed housing from the State. The HCA will incorporate the results of the CHNA in Task 9 about needed housing and inventory of land from BLI in Task 10, including considerations of housing affordability in the CHNA.

The HCA will determine the capacity of buildable land based on analysis of historical development trends developed for the HCA, as required by ORS 197A.270. This analysis will use and refine (as needed) the City's Historical Density Analysis to document trends in density and mix of housing types that have actually been developed, market factors that may substantially impact future urban development, and related factors. The result of the HCA will be a determination of whether Bend has sufficient land to accommodate needed housing growth.

Task 13.4 Housing Capacity Analysis Final Report

The Contractor shall prepare a final, adoption-ready report that addresses City and Council comments which will replace Appendix K of the Bend Comprehensive Plan, following City Council approval. It is anticipated that adoption of the HCA Phase 2 will ultimately replace this document when completed. Any final revisions necessary to address comments raised through the adoption and hearing process will be addressed in Task 14. Adoption Hearings and Support or through use of Adoption Support Contingencies (Task 21).

Task 13.5 Housing Capacity Analysis Community Impact Framework

The Contractor shall analyze the HCA Phase 1 through the Community Impact Framework developed in Task 4 to consider how the HCA may impact different members of the community. The Contractor shall then develop a Community Impact Summary that documents how the Community Impact framework analysis was used, how engagement feedback was integrated into the draft HCA and how outcomes of major feedback themes identified through the Community Impact Analysis may be applied to future tasks and deliverables.

Task 13 Contractor Deliverables

- 13.1 HCA Introduction One-Pager in English and Spanish
- 13.2 HCA methodology memorandum
- 13.3 Review and input on City's Historical Density Analysis
- 13.4 Draft HCA Report
- 13.5 Final adoption-ready HCA Report that addresses City directed comments
- 13.6 HCA Community Impact Summary in English and Spanish

Task 13 City Deliverables

- 13.1 Historical Density Analysis
- 13.2 Review of Draft HCA Report
- 13.3 Review of final adoption-ready HCA Report
- 13.4 Review of HCA Community Impact Summary

Task 14 Adoption Hearings and Support

Task 14.1 Adoption Package #1 Adoption Hearings

The Contractor shall support the local adoption of the CHNA including attendance at one City Council Work Session and up to two Council Hearings. The hearings process may necessitate minor changes to the CHNA which are accounted for in this task. Should significant changes be required or should Council's decision be remanded by DLCD, additional hours to support changes are included as a Contingency task.

Task 14.2 Adoption Package #2 Adoption Hearings

The Contractor shall support the local adoption of a package of amendments, including the Buildable Lands Inventory, The Economic Opportunity Analysis, and the Housing Capacity Analysis Phase I, that will be adopted as a land use decision. This assumes attendance at one City Council Work Session, one Planning Commission Work Session, up to three Planning Commission Hearings, and up to three City Council Hearings. The hearings process may necessitate minor changes to deliverables which are accounted for in this task. Should significant changes be required or should Council's decision be remanded or appealed, additional hours to support subsequent needs and substantial revisions to support adoption are included as a Contingency task.

Task 14 Contractor Deliverables

- 14.1 Attend one (1) City Council Worksession and up to two (2) Council Hearings (for Adoption Package #1)
- 14.2 Attend one (1) City Council Worksession and one (1) Planning Commission Work Session (for Adoption Package #2)
- 14.3 Attend up to three (3) Planning Commission Hearings (for Adoption Package #2)
- 14.4 Attend up to three (3) City Council Hearings (for Adoption Package #2)
- 14.5 Adoption Package #1 and #2 Hearing Presentations

14.6 Review and comment on City's Draft Findings

Task 14 City Deliverables

14.1 Meeting facilitation and logistics

14.2 Adoption materials (staff reports, draft findings, responses to decision makers)

PHASE 3 PLAN

This phase will include broadbased public engagement to define a shared Growth Vision and co-design the future of Bend through hands-on public workshops across the city. Growth scenarios and specific policies will be modeled and evaluated, and results shared for feedback and refinement into a preferred Growth Plan for Bend. Phase 3 will be initiated but not finished in the current biennium ending June 30, 2027. Below are the tasks that will be completed within the current biennium.

Task 15 Community Visioning and Engagement

Purpose: The Community Visioning step is a foundational step of the Bend Growth Plan. This is the highest profile part of the Bend Growth Plan and offers the most broadly accessible and inclusive opportunities for public engagement. The Visioning process will identify shared values and craft a set of vision statements, growth goals, and associated principles that will shape and guide all subsequent steps of the project. The values and goals established in the Growth Vision will form a shared language that will ensure consistent messaging during all engagement, define the evaluation criteria used in measuring scenario performance, and shape the organization and priorities reflected in the Comprehensive Plan.

This phase is designed to reach the greatest number and diversity of participants of any stage in the project. By front-loading this engagement early in the process, the project team can engage far and wide before technical alternatives are defined, creating space for open-ended input about values, tradeoffs and priorities rather than reactions to predetermined solutions.

Community Visioning offers the widest possible range of input for people at different levels of understanding and interest. Some participants will want to engage at a big-picture level, reflecting on what makes Bend special, what concerns them about growth, and what kind of community they want in the future. Others will want to dive into more detailed conversations about housing types, transportation investments, economic trends, or infrastructure constraints. The visioning framework is intentionally structured to capture both types of input. By asking broad but thoughtfully designed questions, there is space to hear about values, lived experience, technical concerns, and community

aspirations. The Contractor shall capture and synthesize public input into meaningful direction on the technical products.

Visioning activities will be supported by a coordinated set of engagement materials and communication tools designed to implement both broad and targeted participation simultaneously, allowing activities to occur in parallel and promoting project awareness. These tools will enable consistent use by both the project team and community partners. Specific methods, tools and tactics will be outlined in the first Engagement Action Plan (Task 6.2.1), and be informed by the Community Impact Analysis to ensure populations are being reached through appropriate mechanisms.

A consistent set of core visioning questions will be used across engagement formats to ensure that feedback gathered in different settings can be compared, synthesized, and translated into actionable insights. This consistency strengthens the analytical integrity of the process and allows themes to emerge clearly across audiences.

The Vision will provide a recognizable and consistent framework for all subsequent work in this process, including all engagement touchpoints, indicators to compare land use scenarios, and organizing the new Comprehensive Plan. Input gathered through all the activities will be synthesized to inform multiple components of the project, including the Contextualized Housing Needs Analysis (CHNA), Economic Opportunities Analysis (EOA), Housing Capacity Analysis (HCA), and the Transportation System Plan (TSP), and the Urban Form Report. In this way, Community Visioning is not a standalone exercise, but the foundation upon which the Bend Growth Plan is built.

Task 15.1 Review of Prior Visioning Efforts

The City will provide a summary of prior visioning efforts that have taken place in Bend in recent years (i.e.- Envision Bend, Council Goal setting, etc) to identify common themes and community values across other visioning efforts to inform the Community Visioning work. This will ensure the project team understands the history of previous visioning efforts. During the two day worksession with Council, the team will seek guidance on what aspects of these past visioning exercises are still relevant and a priority to include in this planning effort.

Task 15.2 Visioning Engagement Activities and Materials

The Contractor shall design and facilitate a mix of broad-based and targeted visioning activities that emphasize reaching people where they already gather. Building on the framework described above, engagement tools and materials will be deployed across multiple settings and audiences in alignment with the Engagement & Communications Strategy and detailed further in Engagement Action Plan #1.

Rather than tailoring entirely separate conversations for each activity, the team will apply a shared set of core prompts that anchor discussions across formats and allow input to be analyzed collectively. Maintaining a common structure ensures that feedback can be compared across audiences, strengthens transparency, and supports clear synthesis into themes that meaningfully inform technical work. Feedback for all activities will be logged in the engagement feedback system developed in Task 6.5 and regularly summarized as part of the engagement summaries described in Task 6.6.

Engagement efforts will be launched concurrently to create a defined and visible window for participation. Running activities in parallel builds project awareness, reinforces consistent messaging, and allows community members to engage through the format that best fits their interests, comfort level, and availability. Input from this phase will be distilled into cross-cutting themes and guiding principles that inform the CHNA, EOA, HCA, TSP, and other major deliverables, while satisfying applicable Division 8 and 12 engagement requirements. Materials will be designed for consistency and reuse across multiple settings and audiences to ensure both efficiency and clarity of message. Activities will include but are not limited to:

- **Visioning Roadshow:** The Contractor shall design and facilitate a series of neighborhood-based workshops, structured as a “roadshow” that travels to different parts of the city. These workshops will offer a hands-on, interactive, play-based visioning activity that allow participants to explore and build their ideal future city. Workshops will be hosted in familiar, accessible venues and scheduled at varied times to support participation by different audiences. The Contractor facilitate up to three roadshows and provide training and materials so City staff may host additional roadshows throughout the City.
- **Community Conversations:** The Contractor shall support a series of Community Conversations designed to extend the reach of the visioning process directly into existing community networks throughout Bend. These conversations are intentionally structured as a “meeting-in-a-box” model and prioritize “going to where people are,” focusing on existing meetings, gatherings, and trusted spaces where people already connect and exchange information. The Contractor shall design and prepare a downloadable “Community Conversation Kit” that includes step-by-step instructions, facilitation guidance, core discussion prompts, note-taking templates, and simple tools for submitting feedback. The Contractor shall also conduct up to six Community Conversations in partnership with City staff. The kit will allow committee members, City staff, and community partners to independently host a discussion within their own networks and trusted spaces, then submit summarized notes back to the project team through a structured feedback portal. The goal is to multiply the project’s reach by empowering community members to host self-directed visioning conversations within their

own circles, whether that be neighborhood groups, business associations, school communities, faith-based groups, recreational clubs, or other social networks.

- **Focus Groups and Interviews:** To supplement broad outreach, the team will conduct more targeted engagement with specific communities whose perspectives are essential to understanding growth-related impacts and meeting Division 8 and Division 12 requirements. These will include members of the BIPOC community, people with disabilities, people with low incomes, service providers for people experiencing homelessness, Tribal representatives, workforce service workers, LGBTQ community members, people with disabilities, transit users, and those with limited English proficiency (LEP). These conversations will extend the reach of the visioning process but also be more tailored to uncovering challenges associated with housing access, affordability, job access, business needs, and transportation. These questions will be reviewed in advance by staff. The Contractor shall conduct up to six focus groups and ten interviews and develop summarized notes.
- **Community Events and Pop-Up Engagement:** Community events provide an opportunity to engage large and diverse audiences in informal, approachable settings. Tabling activities will range from information booths to intercept surveys, designed to create awareness of the project and invite participants of all ages to share what they value about Bend today and what they would like to see change in the future. City staff will be the primary staff at these events.
- **Youth Centered Activities:** Involving youth in a discussion about Bend's future is critical to the integrity of the visioning process. The Contractor shall provide flexible support for youth engagement in ways that align with available staff resources and existing school or community structures. The Contractor shall prepare youth-friendly engagement materials that can be easily integrated into existing structures such as high school government or civics classes, student leadership programs, clubs, and other youth-serving organizations. For example, the Community Conversation "meeting-in-a-box" model can be adapted specifically for youth settings, allowing the project team, teachers or youth leaders to host a structured discussion as part of a class period or club meeting and submit summarized feedback through the same project portal. The Contractor shall design the materials and prompts and conduct up to two youth-centered activities in partnership with City staff such as engaging with Central Oregon Community College's Avanza Program. Classroom incentives or stipends may be recommended where appropriate to support participation.
- **Online Survey:** A community-wide survey will supplement in-person and partner-led engagement activities, providing a flexible, accessible way for community members to share input throughout the visioning phase. The online

survey will intentionally mirror other engagement formats, using the same core visioning questions and prompts deployed at events and small group discussions to ensure a recognizable framework regardless of how someone participates. The survey will be live for the duration of the Visioning phase and promoted through multiple channels.

- Public Installations:** Deployment of passive installations, such as place-based prompts or visual displays in high-visibility locations, allow community members to engage on their own time and contribute ideas in a low-barrier way. Installations may include sidewalk decals or chalk stencils featuring short prompts and QR codes linking directly to the online survey; temporary chalkboard or whiteboard murals in public plazas where people can respond to a rotating “Vision Question of the Week”; poster boards or window displays in storefronts and community hubs; or pop-up boards at libraries, recreation centers, and transit stops. QR codes can be embedded across materials to ensure that even brief interactions connect back to the consistent core questions used throughout the Visioning phase. The scale and type of installations will depend on staff capacity, available resources, permitting considerations, and partnerships with local businesses, arts organizations, or community groups. CP will develop adaptable templates, prompts, and visual assets that can be deployed in a range of formats, allowing the City to scale installations up or down as feasible. All feedback mechanisms will be designed to feed into a recognizable framework used across other engagement activities, ensuring passive participation meaningfully contributes to the overall Vision.

The Contractor shall develop and design up to ten communications materials to inform the public about upcoming engagement opportunities, project developments, and other Vision-related updates. Materials could include, but are not limited to, social media posts and graphics, event flyers and posters, newspaper ads, mailers, and website content. The City will disseminate materials and coordinate logistics for producing printed materials and posting online content.

Task 15.3 Bend’s Growth Vision

Upon completion of the Visioning engagement activities, the Contractor shall synthesize community input to develop Bend’s Growth Vision. The Growth Vision will be a clear set of values-based growth goals and associated principles that links community priorities to and ensures they guide all subsequent planning, performance measuring, and technical efforts including the CHNA, TSP, EOA, HCA.

The Contractor shall analyze input from all visioning activities to identify key themes organized around principles of place, which serve as the project’s shared spatial framework. These principles may include concepts such as play, connection, investment,

innovation, equity, and resilience, and will function both as the organizing framework for the updated Comprehensive Plan and well as a consistent set of evaluation criteria used to assess growth alternatives during scenario planning, creating a direct link between community values and decisions about how Bend grows over time.

The Contractor shall prepare a draft Vision Statement and supporting narrative that articulates Bend's shared aspirations for growth through 2050 and translates those aspirations into place-based principles that can be applied spatially. The draft Vision will be introduced at the first scenario planning workshop (Task 17.4). Based on input from this workshop, the Vision Statement will be refined, finalized, and approved by the City Council. This approach intentionally links the visioning and scenario planning phases, ensuring that growth concepts and tradeoffs are grounded in community values and a common framework is used for comparing scenarios, informing technical analysis, and shaping future Comprehensive Plan goals and policies.

Task 15 Contractor Deliverables

- 15.1 Design and conduct up to three (3) in-person Visioning Roadshows and log feedback
- 15.2 Develop a Community Conversations Kit and tracking log for scheduling coordination
- 15.3 Conduct up to six (6) Community Conversations and log feedback
- 15.4 Conduct up to six (6) in-person focus groups and ten (10) virtual interviews, log feedback, and summary report
- 15.5 Develop one (1) set of tabling/booth activities
- 15.6 Develop one (1) online questionnaire and summary report
- 15.7 Prepare materials for youth engagement and support up to (2) youth activities and log feedback
- 15.8 Develop one (1) set of passive engagement materials for public installations
- 15.9 Preparation of up to ten (10) communication materials to support Visioning Activities
- 15.10 Draft and Final Vision Statement

Note: Engagement summaries are included in Task 6 Deliverables

Task 15 City Deliverables

- 15.1 Summary of prior visioning efforts and vision & values themes

- 15.2 Support logistics and coordination of Visioning Roadshows; conduct additional Roadshows as needed and log feedback
- 15.3 Support logistics and coordination of Community Conversations; conduct additional Community Conversations as needed and log feedback
- 15.4 Review and comment on targeted focus group and interview questions
- 15.5 Support logistics and coordination of focus groups and interviews
- 15.6 Staff tabling at Community Events and log feedback
- 15.7 Coordinate logistics and support youth activities
- 15.8 Coordinate logistics and management of public installations and log feedback
- 15.9 Promotion and dissemination of visioning outreach materials and activities
- 15.10 Review Draft Vision Statement

Task 16 Housing Capacity Analysis Phase 2 (Start-Up Tasks)

Purpose: The Phase 2 portion of the Housing Capacity Analysis (HCA) work will identify the actions needed to accommodate allocated housing need for which there is insufficient capacity for the planning horizon. This task covers the requirements under Oregon Revised Statute (ORS) 197A.270(5)-(6) and is directly tied to Task 17.

The tasks below will begin the second phase of the Housing Capacity Analysis (HCA) within the current biennium, but the remaining tasks needed to complete the HCA Phase 2 will be included in future contract amendments (and take place in future biennium).

Primary Legal Citations: OAR 660-008-0045, ORS 197A.270(5)-(6)

Task 16.1 Housing Capacity Analysis (Phase 2) One-Pager

The Contractor shall update and revise the HCA (Phase 1) one-pager outlining the intended outcome and key drivers for the HCA that can be used for the City Council and at engagement events. The Contractor shall translate the one-pager into Spanish.

Task 16.2 Housing Capacity Analysis (Phase 2) Methodology

The Contractor shall identify any major changes to the HCA Phase 1 methodology to support the Phase 2 analysis in a memorandum that identifies the timeline and major

steps involved in completing the HCA Phase 2 consistent with the relevant OARs, major issues and methods and data needed to complete the HCA, Contractor and City roles, methods and data needs to complete the task.

The Contractor shall ensure the methodology considers Community Impact Framework Findings (from Task 4) which will be further addressed in Task 12.5.

Task 16 Consultant Deliverables

16.1 HCA2 One-Pager in English and Spanish

16.2 *HCA2 Methodology Memorandum*

Task 16 City Deliverables

16.1 Review and comment on HCA2 Methodology Memorandum

Task 17 Urbanization and Growth Planning (Start-Up Tasks)

Purpose: The purpose of this task is to define the growth map for Bend that is consistent with the Growth Vision and co-created with the community during hands-on public workshops across the city. The task will identify and test land use efficiency measures (LUEMs) and evaluate potential Urban Growth Boundary (UGB) expansion areas to provide needed housing, employment, and other urban uses such as public facilities, streets and roads, schools, parks and open space over the 20-year planning period.

This task will be initiated, but not completed, within the current biennium. Work in the first biennium will include establishing a work plan for all urbanization and growth planning tasks anticipated in the project and several tasks to support growth planning within the existing UGB (Growing Up). Future phases of this task will include work related to Growing Out (UGB Analysis, Suitability Criteria, and Land Evaluation), a robust exploratory scenario planning process to evaluate a variety of land use and transportation future states, and an integrated community engagement process that uses hands-on public workshops to select a preferred growth scenario (map) for Bend, including the designation of CFAs, that is reflective of the Community's Vision. Outcomes of this task will ultimately address the land need requirements of Statewide Planning Goal 14.

Primary Legal Citations: Oregon Revised Statute (ORS) 197A.270(5-6), ORS 197A.285, Oregon Administrative Rule (OAR) 660-024

Task 17.1 Growth Planning Introduction One-Pager

The Contractor shall develop a one page-summary document to introduce the topic of Growth Planning including Goal 14 requirements and the evaluation of both growing up (Land Use Efficiency Measures Analysis, CFA Designation) as well as growing out (UGB Analysis) to City Council and the Community that outlines intended outcomes and key drivers of the process and methodology developed in Task 17.2.

Task 17.2 Growth Planning Workplan

The Contractor shall prepare a draft work plan that identifies the timeline and major steps and deliverables involved in growth planning, including public workshops, scenario modeling, CFA Designation, development of a Housing Production Strategy, Land Use Efficiency Measures (LUEM) and UGB Evaluation (associated with Adoption Packages 3 and 4). This memo will address the requirements of Division 12 as well as capacity and efficiency evaluations associated with Statewide Planning Goals 9, 10, and 14 with consideration of Goal 12 as well such as CFAs, equity, key destinations, land use requirements, GHG/VMT targets, and Highway Impacts.

Task 17.3 Growing Up

The Contractor shall identify all infill opportunities and evaluate the capacity created by different LUEM policies within the existing UGB. The mapping of infill opportunities will build on the current spatial policy framework created in Task 4.1.2.

Task 17.3.1 Infill (LUEM & CFA) Methodology Memo

The Contractor shall develop a methodology for evaluating infill opportunities and evaluating the capacity of different LUEM policies within the existing UGB. The methodology will be informed by the policy analysis tool selected by the City in Task 3. The memo will identify the timeline and major steps involved in completing the infill assessment consistent with the relevant OARs; a recommended approach including the process to engage the public in through a “How We Grow Up” Public Workshop; Contractor and City roles; and methods and data needed to complete the task. It will also consider Community Impact Spatial Analysis Findings (from Task 4)

Task 17.3.2 Preliminary LUEM Identification

The Contractor shall compile a list of existing LUEMs and LUEMs identified during the CHNA (Task 10.4) and prior engagement efforts for City review.

Task 17.3.3 Infill Opportunity Area (IOA) Designation and Mapping

The Contractor shall create a draft Infill Opportunity Area (IOA) map building upon the spatial policy framework from Task 4.1.2 and the CFA refinement efforts in Task 7.2.2. The map will be an illustrative composite of all plans (including the preliminary CFAs and any secondary or abutting CFAs) and policies (preliminary LUEMs). This initial map will be used to gather public input in the “How We Grow Up” Public Workshop to identify additional infill opportunities or places where existing policies could be modified to accommodate additional infill growth. Key members of the Contractor team will conduct a visit and tour with City staff to ground-truth the draft IOA map.

Task 17.4 Growth Planning Workshops

A series of public workshops will be used to allow the public to provide direct, spatial input on the best ways to plan for future growth in Bend. In the first biennium, the project team will prepare for the first public growth planning workshop that uses a hands-on “chip game” that will allow members of the public to wrestle with how best to accommodate future growth using scaled “place type” chips. The first round of workshops will focus on gathering community input on how the City should “grow up” and “grow out”. Following this round of engagement, the final workshop(s) will be used to share out the findings from the modeling of different land use scenarios. Scenarios will be evaluated on performance metrics linked to the Growth Vision goals and principles. The scenarios will highlight different themes that came up in the public workshops and allow the public to evaluate and compare the performance of different approaches to achieving the future described by the Growth Vision.

Task 17.4.1 Growth Planning Public Workshop #1 Game Preparation

The purpose of the first public workshop, which will be led by the Contractor, will be to bridge the visioning work with scenario planning. The workshop will provide an opportunity to report out the activities of the visioning phase and unveil the draft Growth Vision. Community members will then have an opportunity to vet the Vision and apply it spatially through a hands-on “chip game” workshop. This will use scaled “place type” chips that have associated densities, use mixes, and affordability and mobility characteristics. CP will prepare a workshop run-of-show (for both in-person and virtual options) and preliminary game materials. *Note: Workshop #1 is assumed to occur in the second biennium and therefore additional resourcing for workshop facilitation, attendance, and developing an online version of the workshop will be addressed in future phases and contract amendments.*

Task 17 Contractor Deliverables

17.1 Growth Planning Introduction One-Pager in English and Spanish

17.2 Growth Planning Work Plan

17.3 Infill Methodology Memo

17.4 Infill and Opportunity Area Mapping Site Tour and Worksession

17.5 Preliminary list of LUEMs

17.6 Draft IOA Map

17.7 Growth Planning Workshop #1 In-Person and Virtual Run of Show and Game Materials

Task 17 City Deliverables

17.1 Review Growth Planning Work Plan

17.2 Participation in CFA Mapping Worksessions

17.3 Review of LUEM List

17.4 Review of Draft IOA Map

17.5 Review of Workshop Materials

Task 18 Transportation System Planning (Start-Up Tasks)

Purpose: This task will begin the work of updating the Bend Transportation System Plan (TSP). The Bend Growth Plan will utilize an integrated land use and transportation planning approach to meet new statewide planning requirements including requirements to size and designate CFAs (Division 12-0320), create walkable land use patterns across an urban area (-0330) and meet a variety of land use and transportation performance targets (-0905). An integration of land use and transportation planning will be critical to achieving state regulatory requirements.

In the first biennium, the project team will complete several start-up tasks to inform the project and the planned update to the TSP. However, necessary tasks to complete an update to the TSP will be included in future contract amendments (and take place in future biennium).

Primary Legal Citations: OAR Chapter 660 Divisions 12

Task 18.1 TSP Goals, Objectives, Performance Standards Memo

The Contractor shall develop TSP Technical Memorandum (TM) #1, which will establish the framework for addressing required land use and transportation performance measures and targets as specified in applicable elements of the TPR and the Statewide Transportation Strategy and as informed by the results of Task 8. TSP TM#1 will start with a review of the City's transportation and planning documents and be based on the 2020 Bend TSP Goals and Policies. TM #1 will establish draft vision, goals, objectives, and evaluation criteria as a basis for public and decision-maker input on policy, selecting a preferred alternative, and project prioritization. These elements will be structured in a way that informs relevant, strategic, actionable policies in support of Statewide Planning Goal 12, "to provide and encourage a safe, convenient, and economical transportation system." The Contractor shall support this task by providing input on system-level performance measures (derived from the regional travel model), system resiliency topics (e.g., evacuation planning), and consistency with Oregon Department of Transportation (ODOT) recommended procedures for implementing CFEC analysis into transportation system planning.

Task 18.2 Transportation System Inventory

The Contractor shall lead TSP TM#2: Transportation Systems Inventory, which will document key elements of Bend's transportation system in support of the TSP update. This scope encompasses assembling inventories for transportation systems in the community, including roadway, bicycle, pedestrian, and transit networks, within the existing Urban Growth Boundary (UGB) based on available City and partner agency data. The Detailed Scope included in the City's RFP documents specific details of these inventories based on the Transportation Planning Rule (TPR). Based on available data, the inventories will capture current facility presence, conditions and key infrastructure attributes. The Contractor shall also inventory the freight system, major freight generators, and the pipeline system within the UGB, using the existing TSP as a starting place. Data for this inventory, which will include multimodal traffic volume counts collected by the City, Bend Metropolitan Planning Organization (MPO), and ODOT, will be coordinated with the Data Portal for the project that will be established through Task 2 of this scope of work.

This scope of work also includes a contingency expense (up to \$20,000) to collect multimodal traffic volume counts at intersection or corridor segments as requested by City staff. The purpose of these counts would be to fill gaps where traffic counts are needed to understand current transportation conditions. Specific requirements for these counts are included in Task 17.2 of the City's RFP.

Based on work in Task 7, the Contractor shall calculate VMT per capita under existing conditions. This calculation will be determined using the Bend-Redmond Travel Demand Model and be consistent with the VMT definition provided in OAR 660-012-0005(64) and 0160. Underlying modeling assumptions and methodology will be clearly detailed.

Task 18.3 Transportation System Existing Conditions Analysis

The Contractor shall lead development of the Transportation System Existing Conditions Analysis (TSP TM#3). This analysis will include the development of a Transportation Analysis Methodology Memorandum that outlines the approach for collecting, analyzing, and interpreting transportation data within the Bend Urban Growth Boundary (UGB) for both existing and future conditions. Analysis methods will be documented for crash analysis, vehicular analysis, VMT computations, and multimodal analysis. The Contractor shall review applicable regulatory requirements and identify appropriate performance standards including pedestrian and bicycle Level of Traffic Stress (LTS) networks as provided by the ODOT Multimodal Inventory, transit service coverage, and applicable vehicular performance standards and targets. The methodology will detail the data sources, analytical tools, and evaluation criteria to be used.

For TSP TM#3, the Contractor shall conduct an analysis of existing transportation conditions by referencing inventory data developed in Task 17.2 or via other sources, such as the Bend TSAP, the ODOT multimodal inventory work, or data developed through the Bend Growth Plan to assess deficiencies in the current transportation system. Modal analysis will focus on gaps and deficiencies for each mode evaluated (including analysis of up to 80 intersections during the PM peak hour where count data is available). The Contractor shall support the analysis by evaluating system and link-level metrics based on the regional travel demand model.

The Contractor shall conduct a high-level emergency evacuation analysis to confirm key corridors and identify potential capacity deficiencies based on potential large-scale evacuations within the Bend UGB (up to nine emergency scenarios that combine variations of event location, time of day, and time of year). The methodology for this analysis will be determined through coordination with City staff, considering options such as GIS network analysis or modified travel demand model assignment scenario.

The Contractor shall collaborate with City staff to engage Emergency Management members as needed to develop scenarios for analysis. Findings will serve as the baseline for use in further emergency evacuation analysis in other tasks that lead to project/policy/study recommendations and prioritization. The findings from this analysis will be summarized into an Emergency Evacuation Planning Technical Memo (TM#4) to

provide a solid foundation for subsequent evacuation planning and decision-making tasks. A more detailed scope of work is included in the Project RFP.

Task 18 Contractor Deliverables

- 18.1 Draft and Final Goals, Objectives, Performance Standards Technical Memo (TM #1)
- 18.2 Draft and Final Transportation System Inventory Technical Memo (TM #2)
- 18.3 Draft and Final Transportation System Existing Conditions Technical Memo (TM #3)
- 18.4 Emergency Evacuation Planning Technical Memo (TM #4)
- 18.5 Draft and Final Transportation Analysis Methodology Memorandum

Task 18 City Deliverables

- 18.1 Review TSP TM #1-4 Transportation Analysis Methodology Memorandum

Task 19 Comprehensive Planning (Start-Up Tasks)

Purpose: This task begins a major update to Bend's Comprehensive Plan. A Comprehensive Plan should be the principal and durable policy framework that guides long term growth and from which subsequent policies and implementation actions flow. The Visioning process defined in Task 15 is a key first step to defining the values and priority focus areas that will shape an updated Comprehensive Plan. The Bend Growth Plan will culminate in a fully updated and legally binding Comprehensive Plan that embodies the community's shared vision for future growth and development and satisfies statewide planning goals and other legal requirements.

Finalizing the Comprehensive Plan update will extend beyond this biennium budget period, however, the tasks described below can happen within this biennium and are generally focused on considering potential organizing structures for the document, evaluating existing policies, and building portions of the factual basis required by law.

Primary Legal Citations: ORS 197.175; OAR Chapter 660 Divisions 18, 23, and 24

Task 19.1 Comprehensive Plan Format Recommendations

The Contractor shall review the City's summary of their research into other Comprehensive Plans and their preferences on format and organizational options. The Contractor shall provide a single round of written input, including additional examples, suggestions, and best practice guidance. The City will be primarily responsible for

making final decisions on the format and structure of the updated Bend Comprehensive Plan. The Visioning process could be an important source of input here and it is recommended that the City wait until after the Growth Vision is created to finalize these decisions. Key decisions include plan organization and chapter structure, integration of vision and place-based frameworks, clarity and hierarchy of goals and policies, and approaches for incorporating supporting technical documents.

Task 19.2 Existing Policies Audit

This task will allow the City to reflect on the existing policies and receive input from the Contractor's team as they consider which to keep, modify, eliminate, or add.

Task 19.2.1 City-Led Policy Reflection

The City will conduct and summarize an initial audit of the existing Comprehensive Plan goals and policies to develop a shared, baseline understanding of the current plan and inform subsequent policy development. Staff will review policies and provide a high-level assessment identifying which policies remain relevant, need refinement, or are no longer applicable. The audit will also document staff reflections on key policy concepts, implementation challenges, and considerations that should be explored as the project moves forward. This may include identifying areas where policies are unclear, difficult to implement, or misaligned with current conditions, community priorities, or anticipated growth patterns.

Task 19.2.2 Consultant Policy Review & Best Practices Guidance

The Contractor shall provide a review and assessment of the City's existing policies and offer guidance on best practice changes. In addition, the Contractor shall provide a preliminary set of policy areas or topics that could be worth considering for additional policies. A more complete and final set of policies will emerge through Council input, the Visioning process, and the exploratory scenario process.

Task 19.3 Comprehensive Plan Background Report

The Contractor shall prepare a Comprehensive Plan Background Report that documents existing conditions, planning context, and regulatory requirements for the City's applicable Statewide Planning Goals. This task will synthesize all relevant technical studies, adopted plans, and supporting documents to establish a shared factual foundation for policy development. This will also include summarizing previous work developed in Task 4 and Task 8. Where pertinent information does not exist, the Contractor shall coordinate with City staff to identify available data sources. Information from these sources will be used to describe the factual basis supporting each statewide planning goal and underlying topics as they relate to the City:

- What are the City's current conditions, assets or practices?
- What trends are driving how the topic has changed and will continue to change the community?
- What are the opportunities and challenges to realizing the City's vision for the topic?

The background report will be written in accessible language and use a combination of narrative, maps, tables and graphics to convey key information.

A final draft of the Background Report will be prepared in the second biennium, and relevant portions of the Background Report will be incorporated directly into the updated Comprehensive Plan document.

Task 19 Contractor Deliverables

- 19.1 Draft and Final Comprehensive Plan Format Recommendations Memo
- 19.2 Policy Review of Policy Audit & Best Practices Guidance
- 19.3 Draft Background Report

Task 19 City Deliverables

- 19.1 Comprehensive Plan Policy Audit
- 19.2 Review of Draft Background Report

Task 20. Housing Production Strategy (Start-Up Tasks)

Purpose: This task begins the work of producing a Housing Production Strategy (HPS) for the City of Bend, which will document the actions the City will take to support the production of needed housing consistent with the requirements in OAR 660-008-0200 and ORS 197A.100. The Contractor shall build upon public engagement, governance, and concurrent City efforts to inform this Task including the City's recent establishment of a Housing Options for Everyone (HOME) Committee who is tasked to advise City Council on strategies to support housing development. Actions that support housing production will be analyzed by the Contractor for effectiveness and will ultimately be implemented with the adoption of Efficiency Measures and a UGB expansion through this project.

The tasks below will begin the Housing Production Strategy (HPS) within the current biennium, but the remaining tasks needed to complete the HPS will be included in future contract amendments (and take place in future biennium).

Primary Legal Citations: OAR 660-008-0200, ORS 197A.100

Task 20.1 HPS Introduction One Pager

The Contractor shall produce a one-pager outlining the intended outcome and key drivers for the HPS that can be used for the City Council and at engagement events. The Contractor shall translate the one-pager to Spanish.

Task 20.2 HPS Methodology

The Contractor shall prepare a draft methodology memorandum that identifies the timeline and major steps involved in developing a HPS consistent with the relevant OARs, major issues and methods and data needed to complete the HPS, Contractor and City roles, methods and data needed to complete the task. The methodology will consider and incorporate Community Impact Framework Findings (from Task 4) and will include guidance for Adoption Ready Actions.

Task 20 Consultant Deliverables

20.1 HPS One-Pager in English and Spanish

20.2 HPS Methodology for City Review

Task 20 City Deliverables

20.1 Review and comment on HPS Methodology

CONTINGENCY TASKS

Task 21 Governance, Engagement, Adoption Support Contingencies

Additional labor hours to support additional governance (Council, Joint Committee Working Group, Agency Advisory Group), engagement and visioning activities, or adoption support needs that may arise.

Task 22 Urban Reserves (Start-Up Tasks)

This task, if initiated by the City, would enable the Contractor to package elements of work related to an Urban Reserve with the tasks related to establishing a new 20-year land supply for sake of efficiency and effectiveness of creating a longer-range perspective in land use and infrastructure planning.

Primary Legal Citations: Oregon Revised Statute (ORS) 197A.245, Oregon Administrative Rule (OAR) 660-021

22.1 Establish 10-30 year housing & employment land needs

The Contractor shall develop extended housing and employment estimates beyond the 20-year planning horizon as a basis for a future Urban Reserve. The Contractor shall use these extended population and employment projections to identify land and site needs for all urban uses to a 10-30 year time horizon beyond the 20 year planning period.

22.2 Establish Study Area, Land priority, Suitability Analysis Methodology

The Contractor shall develop a methodology memo that outlines the timeline, and major steps involved in establishing an Urban Reserve, Contractor and City roles, methods and data needed to complete the task.

Task 23 Travel Demand Model Development Support

ODOT will be developing a new travel demand model tool for Bend. As authorized by the City, the Contractor shall provide as-needed support to help review and update the new travel demand model tool. This may include coordinating with ODOT, MPO, Bend, Redmond and Deschutes County staff to develop a new Baseline 2050 land use scenario (including updating population forecasts, demographic information, housing and employment information) for either the existing trip-based travel demand model or the new activity-based travel demand model. This may include comparisons between the new tool and the existing tool based on either 2045 or 2050 land use scenarios and helping the City understand the impact of the new tool on previously reported metrics (e.g., VMT/capita and mode shift). Results from this task will be summarized in presentation slides for discussion with City staff.

FUTURE PHASE 3-5 TASKS

These tasks are future growth-plan related tasks identified by the City in the RFP. They are described in the Scope at a high-level and are subject to future scope and budget negotiations and City authorization.

Phase 3-5 Project Management

Estimated range: \$350K-\$450K

Future budget and tasks to support project management activities for the duration of the project including project oversight, PMT meetings, and project schedule management.

Phase 3-5 Governance and Engagement

Estimated range: \$500K- \$650K

Future governance and engagement tasks and activities to support project Governance (Council work sessions, Committee of Committees, Agency Advisory Board) and Engagement needs (engagement action plans, activities, materials, translation & interpretation, engagement feedback organization, etc) for the remainder of the project's lifetime.

Phase 3-5 Community Impact Reporting

Estimated range: \$30K-\$50K

Task includes development of a draft and final Community Impact Assessment that integrates findings from Community Impact Spatial Analysis and reporting for all major deliverables throughout the project which will integrate the legal requirements of Oregon Administrative Rule (OAR) 660 Divisions 8 and 12 across disciplines.

Housing Capacity Analysis Phase 2

Estimated range: \$115K-\$150K

Remaining tasks to complete an adoption-ready Housing Capacity Analysis Phase 2 including HCA 2 analysis and ultimately a draft and final Housing Capacity Analysis Report.

Urbanization and Growth Planning

Estimated range: \$700K-\$950K

Remaining tasks necessary for Urbanization and Growth Planning to support Bend's Growth Plan including: Land Use Efficiency Measures Technical Analysis, Infill Opportunity Mapping including CFA Designation, UGB Analysis Land Evaluation and Ranking, Refined UGB Expansion Area Planning, and a holistic Scenario Planning process including the selection and development of a Preferred Growth Scenario for Bend. Scenario planning involves a technical analysis to model and evaluate various growth scenarios including transportation modeling and evaluation as well as other key performance measures. Tasks will also include development of an Urbanization and Urban Form Report to guide Bend's future development. Anticipated outcomes of this task include Climate Friendly Area (CFA) Designation, a preferred land use scenario including preferred Land Use Efficiency Measures and UGB Expansion, and an Urbanization and Urban Form Report.

Housing Production Strategy

Estimated range: \$90K-\$150K

Remaining tasks necessary to complete an adoption-ready Housing Production Strategy Report including potential land use changes and programs as well as a market assessment and testing of various actions to support housing production consistent with Division 8 and ORS 197A.100 requirements.

Comprehensive Plan, Implementation, and Policy Documents

Estimated range: \$300K-\$500K

Remaining tasks to complete a redesign and major update to the City's Comprehensive Plan including drafting and reorganization of chapters, policies, content and factual basis. This could also include identification and support of development code updates to implement the preferred Bend Growth Plan scenario and other prioritized actions identified in the Housing Production Strategy (HPS).

Transportation System Plan Update

Estimated range: \$1M-\$1.5M

Remaining tasks associated with developing an adoption-ready update to Bend's Transportation System Plan consistent with Division 12 requirements including TSP vision, goals and objectives, policies, projects, programs and a financial plan.

Adoption Hearings and Support

Estimated range: \$250K-\$350K

Tasks to support adoption and adoption hearings for Adoption Packages #3-5 that include the following deliverables:

- Adoption Package #3: Housing Production Strategy
- Adoption Package #4: Housing Capacity Analysis Phase 2, Land Use Efficiency Measures, UGB Evaluation, CFA Designation, and Comprehensive Plan Update
- Adoption Package #5: Transportation System Plan

Urban Reserves

Estimated range: \$350K-\$400K

Any remaining tasks to establish an Urban Reserve, if approved by City Council, including adoption hearings and support.