

Attachment A: Summary of MUPTE Application and Public Benefit Requirements, Criteria, and Reporting Requirements

APPLICATION REQUIREMENT & SUBMITTAL ITEM	DESCRIPTION OF MATERIALS THAT NEED TO BE SUBMITTED WITH APPLICATION
PRIVATE DEVELOPMENT ENGINEERING LETTER	<ul style="list-style-type: none"> • Applicant must submit letter from City of Bend Engineering Department stating that the proposed use can be served by existing sewer and water services and/or has coordinated with the Engineering Division on all necessary infrastructure mitigation requirements. <ul style="list-style-type: none"> ○ Letter only necessary if project, as proposed in MUPTE application, has not yet received land use approvals
LEGAL DESCRIPTION	<ul style="list-style-type: none"> • A legal description of the property and the assessor's property account number for the site, and indication of site control.
PROOF OF OWNERSHIP	<ul style="list-style-type: none"> • Provide proof of ownership in the form of a deed, or other recorded document. Applicant can submit application without ownership of site secured so long as they demonstrate intent to own or owner authorization (e.g. accepted LOI, binding PSA, owner authorization etc.), however exemption approval will not be allowed until site ownership or owner authorization by the applicant is demonstrated
PROJECT DESCRIPTION	<ul style="list-style-type: none"> • A detailed description of the project, including the number, size, and type of dwelling units; dimensions of structures, parcel size, amount of open space, if applicable; type of construction, public and private access; parking and circulation plans; landscaping; uses; and a description of the public benefit(s) which the applicant proposes to include in the project. Additional public benefits associated with the project that fall outside the scope of the public benefit requirements for MUPTE may also be included in this project description.



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EXISTING USE OF SITE AND JUSTIFICATION FOR DISPLACEMENT	<ul style="list-style-type: none"> • A description of the existing use of the property, including a justification for the elimination of existing sound housing or commercial uses on the property and what efforts or strategies the applicant has made to mitigate displacement impacts to existing businesses or residences, if the project is anticipated to displace any existing businesses or residents. • Identify the number of housing units and businesses that will be impacted by the project, if applicable • If applicable, describe what measures applicant is taking or has taken to mitigate impacts of displacement for residents and businesses such as: <ul style="list-style-type: none"> ○ Advanced notice/communication ○ Relocation assistance (funding or services) ○ Reduced lease rates/rents ○ Right or first option to return
SITE PLAN	<ul style="list-style-type: none"> • A site plan and supporting materials, drawn to a minimum scale of one inch equals 20 feet, which shows in detail the development plan of the entire project, showing streets, driveways, sidewalks, pedestrian ways, off-street parking, and loading areas, location and dimension of structures, use of land and structures, major landscaping features, and design of structures.
DESCRIPTION OF PUBLIC ASSISTANCE	<ul style="list-style-type: none"> • A description and the monetary value of any other public assistance including, but not limited to, grants, loans, loan guarantees, rent subsidies, fee waivers, or other tax incentives, which the property is receiving or which the applicant plans to seek.
ASSESSOR PROPERTY ACCOUNT NUMBER	<ul style="list-style-type: none"> • Provide property account number(s) for the site(s) for which the exemption is being sought. If planning to complete lot line adjustments, please provide a description of proposed lot line adjustments and which lot/site(s) the future exemption should be applied to.
PROJECT RENDERINGS	<ul style="list-style-type: none"> • If available, please include project renderings to help decision makers visualize the proposed project and improvements.



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APPLICATION/ELIGIBILITY REQUIREMENT	EVALUATION CRITERIA	REPORTING REQUIREMENTS
NEW CONSTRUCTION PROJECT	<ul style="list-style-type: none"> Project is new residential development including newly constructed structures, stories, or other additions to existing structures and structures converted in whole or part from other use to housing per ORS 307.603(b) 	No reporting requirements
ELIGIBLE AREA AND/OR PROJECT TYPE	<ul style="list-style-type: none"> Project is located within eligible Core Area TIF boundary; Central Business District (CB); the High Density Residential zone (RH) adjacent to the Core TIF Area between NE 4th Street and NE 5th Streets, a portion of NE Studio Rd between Webster Avenue and SE Alden Avenue, and along NE Irving Avenue between NE 4th Street and NE 8th Street; or is an Urban Dwelling Site project 	No reporting requirements
3 OR MORE DWELLING UNITS ON THE PARCEL	<ul style="list-style-type: none"> Site Plan includes plans for 3 or more units on the parcel seeking the exemption 	No reporting requirements
MULTI -STORY REQUIREMENT	<ul style="list-style-type: none"> For lots greater than 10,000 square feet (sf) in size, Site Plan must demonstrate the project includes 3 or more building stories For lots that are 10,000 sf or less in size, Site Plan must demonstrate that the project includes 2 or more building stories 	No reporting requirements
HOTELS, MOTELS, SHORT TERM VACATION RENTALS PROHIBITED	<ul style="list-style-type: none"> Site Plan must not include any hotels or motels Applicant will be required to provide proof of a deed restriction that prohibits hotel, motel, and short-term rental uses for the period of the exemption (10 years from CofO) Site will not be eligible to receive short term vacation rental permit for the duration of the exemption 	<ul style="list-style-type: none"> Provide proof of a deed restriction that prohibits these uses for the period of the exemption, this will need to be submitted prior to the exemption being applied Staff may verify that STR's are not operating on the site at



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APPLICATION/ELIGIBILITY REQUIREMENT	EVALUATION CRITERIA	REPORTING REQUIREMENTS
		any time during the period of the exemption
<p>PROJECT PROFORMA INCOME STATEMENT WITH AND WITHOUT TAX EXEMPTION THAT DEMONSTRATES PROJECT WOULD NOT BE FEASIBLE BUT FOR THE EXEMPTION</p>	<ul style="list-style-type: none"> • Two project proformas- one proforma with the MUPTE applied and one proforma without it. Both proformas should include: <ul style="list-style-type: none"> ○ Individual operating revenues by type, including rents, non-residential lease rates and parking fees, if applicable ○ Individual operating expenses by type, including vacancy loss, maintenance, and repair/replacement reserve ○ Detailed site costs including acquisition or lease cost and site development costs, including any preliminary bids ○ Detailed horizontal development costs, including any preliminary bids ○ Lending assumptions, including debt to equity split, principal and lending terms ○ specifically highlight any costs associated with meeting public benefit requirements • Project proformas must demonstrate that project, including the inclusion of the required public benefits, is not feasible but for the exemption 	<ul style="list-style-type: none"> • No annual reporting requirements
<p>PUBLIC BENEFITS CHECKLIST</p>	<ul style="list-style-type: none"> • Checklist and submittal items must demonstrate that: <ul style="list-style-type: none"> ○ At least one priority public benefit below is met <ul style="list-style-type: none"> • At least three total public benefits below are met 	<ul style="list-style-type: none"> • See requirements for each individual public benefit below



PUBLIC BENEFIT REQUIREMENTS- PRIORITY PUBLIC BENEFITS (MUST HAVE AT LEAST ONE)

PRIORITY PUBLIC BENEFIT & SUBMITTAL ITEM	APPLICATION EVALUATION CRITERIA	REPORTING REQUIREMENTS
<p>AFFORDABLE HOUSING- LETTER FROM CITY OF BEND HOUSING DEPARTMENT</p>	<ul style="list-style-type: none"> • 10% of units are deed restricted as Affordable Housing for the length of the exemption. <ul style="list-style-type: none"> ○ 60% Area Median Income for rental units ○ 80% Area Median Income for sale units • Appropriate rental rates must be shown in the project proformas submitted as part of the application • For the purpose of calculating unit requirements, fractional units are rounded up to the next whole unit (e.g.. if providing less than 10 units, at least 1 unit must be Affordable) <p>Letter from City of Bend Housing Department</p>	<ul style="list-style-type: none"> • Applicant will be required to provide proof of a deed restriction that restricts income levels for 10% of the units prior to exemption being applied <p>Annual reporting on initial tenants and any new tenants' certification of household income qualifications</p>
<p>MIDDLE INCOME HOUSING- LETTER FROM CITY OF BEND HOUSING DEPARTMENT</p>	<ul style="list-style-type: none"> • 30% of units are deed restricted as Middle Income (120% Area Median Income) housing for the length of the exemption • Appropriate rental rates must also be shown in the project proformas submitted as part of the application • For the purpose of calculating unit requirements, fractional units are rounded up to the next whole unit • Letter from City of Bend Housing Department 	<ul style="list-style-type: none"> • Applicant will be required to provide proof of a deed restriction that restricts income levels for 30% of the units prior to exemption being applied • Annual reporting on initial tenants and any new tenants' certification of household income qualifications



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PRIORITY PUBLIC BENEFIT & SUBMITTAL ITEM	APPLICATION EVALUATION CRITERIA	REPORTING REQUIREMENTS
CHILD CARE FACILITIES- SITE PLAN	<ul style="list-style-type: none"> • Site Plan <ul style="list-style-type: none"> ○ Must demonstrate location of childcare facilities and that it meets all code requirements for those facilities • Identify which childcare provider that the applicant plans to locate in the facility, if available, in the Project Description 	<ul style="list-style-type: none"> • Proof of childcare license before exemption is applied • Annual reporting to verify childcare license
OPEN SPACE AND PUBLICLY ACCESSIBLE PARK OR PLAZA SPACE- LETTER FROM BEND PARK AND RECREATION DISTRICT AND SITE PLAN	<ul style="list-style-type: none"> • More than 10% of site area is dedicated to BPRD (if acceptable to BPRD) or in a public access easement • Dedicated area is located in one continuous area or provides sufficient public benefit, as determined by City Council • Incorporates usable amenities • Application includes a letter from Bend Park and Recreation District demonstrating that the applicant has met and coordinated with BPRD. BPRD's letter should provide an evaluation of how the Open Space, Park or Plaza space meets the intent of the program • Any additional information from the applicant about how the applicant has addressed BPRD's comments 	<ul style="list-style-type: none"> • Land dedication or public access agreement • Staff verification that usable amenities are incorporated into final project before exemption is applied <p>No annual reporting requirements</p>
ENERGY EFFICIENCY DOCUMENTATION FOR HIGH STANDARD OF ENERGY	<ul style="list-style-type: none"> • Applicant must indicate which energy efficiency standard they plan to utilize to qualify for this public benefit and some form of documentation that demonstrates that they have coordinated with the certifying agency 	<ul style="list-style-type: none"> • Submit documentation of 3rd party verification of energy efficiency standard that is met before exemption is applied



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PRIORITY PUBLIC BENEFIT & SUBMITTAL ITEM	APPLICATION EVALUATION CRITERIA	REPORTING REQUIREMENTS
EFFICIENCY/GREEN BUILDING FEATURES	and are on track to meet certification requirements: <ul style="list-style-type: none"> ○ Energy Trust New Buildings Path to Net Zero; or ○ LEED Platinum; or ○ Earth Advantage Platinum or higher 	No annual reporting requirements

PUBLIC BENEFIT REQUIREMENTS- ADDITIONAL PUBLIC BENEFITS (MUST HAVE AT LEAST TWO)

ADDITIONAL PUBLIC BENEFITS & SUBMITTAL ITEM	APPLICATION EVALUATION CRITERIA	REPORTING REQUIREMENTS
ENERGY EFFICIENCY DOCUMENTATION FOR ADDITIONAL ENERGY EFFICIENCY/GREEN BUILDING FEATURES	<ul style="list-style-type: none"> ● Applicant must indicate which energy efficiency standard they plan to utilize to qualify for this public benefit and some form of documentation that demonstrates that they have coordinated with the certifying agency and are on track to meet certification requirements: <ul style="list-style-type: none"> ○ Energy Trust of Oregon New Building Whole Building; or ○ Energy Trust Multifamily Market Solutions Best; or ○ Earth Advantage Silver or higher; or ○ LEED Silver; or ○ Solar installation that will supply some of the building's energy using solar. 	<ul style="list-style-type: none"> ● Submit documentation of 3rd party verification of energy efficiency standard that is met before exemption is applied ● If utilizing the solar installation, submit City of Bend solar permit and coordinate with City staff to verify requirement is met before exemption is applied ● No annual reporting requirements



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ADDITIONAL PUBLIC BENEFITS & SUBMITTAL ITEM	APPLICATION EVALUATION CRITERIA	REPORTING REQUIREMENTS
<p>TRANSIT SUPPORTIVE AMENITIES- LETTER FROM CASCADE EAST TRANSIT</p>	<ul style="list-style-type: none"> • Site Plan must include proposed facilities used to meet this public benefit • Application includes a letter from Cascade East Transit (CET) demonstrating that applicant has met and coordinated with CET • Project provides all of the following facilities or facilities that they deem to be equivalent in relevance and/or need: <ul style="list-style-type: none"> ○ A transit stop or transfer station ○ ADA compliant accessways to the transit stop ○ A concrete pad to support a covered shelter at the transit stop ○ Conduit for power and data for transit signage ○ Secure bicycle parking for a minimum of 10 bikes ○ A bench ○ Pedestrian scaled lighting 	<ul style="list-style-type: none"> • City to verify proposed facilities are constructed before exemption is applied • No annual reporting requirements
<p>MOBILITY SUPPORTIVE AMENITIES- LETTER FROM COMMUNITY & ECONOMIC DEVELOPMENT DEPARTMENT</p>	<ul style="list-style-type: none"> • Mobility hub elements including but not limited to shared micromobility facilities (meeting the requirements of BC Chapter 7.60 if proposed in the public right-of-way), enhanced pedestrian and bicycle facilities, amenities, and storage such as secure bike lockers, upgraded crosswalks, street lighting, curb bulb-outs, pedestrian plazas, and dedicated spaces for bikeshare, or shared vehicle, or taxi pick-up and drop-off 	<ul style="list-style-type: none"> • City to verify proposed facilities are constructed before exemption is applied • No annual reporting requirements



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ADDITIONAL PUBLIC BENEFITS & SUBMITTAL ITEM	APPLICATION EVALUATION CRITERIA	REPORTING REQUIREMENTS
	<ul style="list-style-type: none"> • Minimum of two site elements from the following list in a consolidated area on the site: <ul style="list-style-type: none"> ○ Pedestrian Plaza (minimum of 500 square feet) ○ Flex mobility space (a minimum of 250 square feet) ○ Secured bicycle lockers for a minimum of 10 bicycles ○ Passengers pick up and drop off areas that are designed to protect pedestrians and bicyclists from vehicle conflicts. Queue areas must provide adequate capacity to prevent vehicles from blocking streets and access corridors. ○ Pedestrian scaled lighting that serves mobility supportive amenities ○ Accommodation of micromobility services and parking ○ Enhanced pedestrian crossing that serves mobility supportive amenities 	
<p>GROUND FLOOR COMMERCIAL-SITE PLAN</p>	<ul style="list-style-type: none"> • More than 35 percent of the ground floor is commercial uses not including accessory residential uses such as residential lobby, storage, etc • Commercial use ground floor calculation must be included as part of the application and be consistent with site plan 	<ul style="list-style-type: none"> • City to verify before exemption is applied. • No annual reporting requirements



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ADDITIONAL PUBLIC BENEFITS & SUBMITTAL ITEM	APPLICATION EVALUATION CRITERIA	REPORTING REQUIREMENTS
STORMWATER- LETTER FROM BEND UTILITY DEPARTMENT	<ul style="list-style-type: none"> Application must include both a letter from City of Bend Utility Department indicating that site plan and proposed stormwater infrastructure is consistent with City of Bend Stormwater Credit Program requirements as well as the Stormwater Credit Program application 	<ul style="list-style-type: none"> Must submit approved Stormwater Credit Program application before exemption is applied Submit recorded stormwater management agreement before exemption is applied Annual reporting throughout the duration of the exemption on stormwater management in compliance with management agreement
ENVIRONMENTAL REMEDIATION DOCUMENTATION	<ul style="list-style-type: none"> Copy of documentation of any recent environmental clean-ups and site status from other governmental agencies (ie. DEQ) 	<ul style="list-style-type: none"> Verified documentation by City of Bend staff before exemption is applied No annual reporting requirements
PUBLIC FACILITIES- DESCRIPTION OF PUBLIC FACILITIES	<ul style="list-style-type: none"> Description of public facilities that will be included in the project, and indicated on site plan Facility will be open to the public or description of how the facility provides sufficient public benefit if not open to the general public 	<ul style="list-style-type: none"> City to verify public facility is included in the project before exemption is applied Annual reporting on public facility use and how the facility is remaining open to the general public as applicable
ENHANCED LANDSCAPING- LANDSCAPING PLAN	<ul style="list-style-type: none"> All landscaping proposed on site is in compliance with Chapter 12 of the Bend Standards and Specifications and should include native, pollinator-friendly and water-wise landscaping best practices 	<ul style="list-style-type: none"> Water budget must remain within 20% of the approved water budget for the site as monitored by the City or the exemption may be subject to termination



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ADDITIONAL PUBLIC BENEFITS & SUBMITTAL ITEM	APPLICATION EVALUATION CRITERIA	REPORTING REQUIREMENTS
	<ul style="list-style-type: none"> Submit water budget prepared by a licensed landscape industry professional. If needed, this item can be submitted following approval but must be submitted and approved before exemption is applied. 	
ELECTRIC VEHICLE (EV) CHARGING STATIONS- SITE PLAN	<ul style="list-style-type: none"> Demonstrate on site plan how applicant plans to provide EV charging infrastructure to 10% more parking spaces than code minimum requires Must include calculation for proposed EV charging spaces compared to total parking spaces proposed 	<ul style="list-style-type: none"> City of Bend to verify total number of spaces that are provided with EV charging infrastructure before exemption is applied No annual reporting requirements
WRAPPED PARKING STRUCTURE- SITE PLAN	<ul style="list-style-type: none"> Site Plan must demonstrate that retail and residential uses are provided on the street level for any frontages on a street level with a higher classification than an alley for any above-grade parking structures 	<ul style="list-style-type: none"> City of Bend to verify construction of wrapped parking as proposed in approved site plan and building permits before exemption is issued No annual reporting requirements
OTHER PUBLIC BENEFIT THAT EXTENDS BEYOND THE PERIOD OF THE EXEMPTION, MUST BE APPROVED BY CITY COUNCIL.	<ul style="list-style-type: none"> Description of proposed public benefit and how the benefit extends beyond the lifetime of the exemption 	<ul style="list-style-type: none"> City Council must authorize the public benefit before it is approved for exemption Staff will verify benefit is constructed as presented

