

HISTORIC CITY of CARLTON

PREPARED FOR



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SEPTEMBER 29, 2021

PROPOSAL FOR COMPREHENSIVE PLAN UPDATE SERVICES

SUBMITTED BY 3J CONSULTING

9600 SW Nimbus Ave, Suite 100, Beaverton, OR 97008
503.946.9365 www.3jconsulting.com



September 29, 2021

Aimee Amerson
City Planning and Administrative Manager
City of Carlton
191 E. Main Street
Carlton, OR 97111

RE: City of Carlton Comprehensive Plan Update Services

Dear Ms. Amerson:

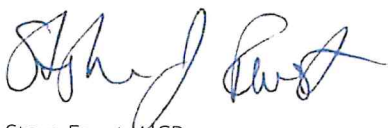
3J Consulting is pleased to submit this proposal to assist the City of Carlton with Comprehensive Plan Update services. We understand that the current Comprehensive Plan was adopted in 2000 does not adequately prepare the City for significant growth expected over the next 20 years. Along with growth comes opportunities and challenges related to housing, economic development, and many other factors that contribute to livability. The Carlton Comprehensive Plan will include a 20-year vision for the city developed through a robust and inclusive public participation process. Comprehensive Plan policies will strengthen community livability by guiding land use decisions through 2042.

3J has led Comprehensive Plan updates with enduring results for several communities throughout the Pacific Northwest, including North Plains, a city of less than 3,000 residents in Washington County. We bring an enthusiastic and experienced team to help you facilitate an inclusive and engaging process. Our approach maximizes public participation in crafting the vision and developing sound policies to guide Carlton's future.

For the **additional proposal** to update the City Development Code, 3J will partner with JET Planning. 3J and JET have a particularly close, effective working relationship, having collaborated on dozens of code-related projects over the past ten years. In particular, we have worked on many housing code-related projects, including projects to comply with HB 2001 for four jurisdictions in 2020-2021.

3J is committed to performing all the work outlined in the RFP within the time periods established by the City. Anaïs Mathez will manage the project and serve as the primary contact for the 3J Consulting team. I will serve as principal-in-charge and oversee all deliverables. We look forward to discussing this exciting opportunity with you.

Sincerely,



Steve Faust, AICP
3J Consulting Project Manager

9600 SW Nimbus Avenue, Suite 100
Beaverton, OR 97008
O: 503.946.9365 x.207
steve.faust@3j-consulting.com

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EXECUTIVE SUMMARY

The Carlton community is changing, and the City is due for an updated Comprehensive Plan that prepares the community for expected growth and meets the needs of the future. 3J Consulting (3J) will design and facilitate a robust community engagement program, and develop a vision and comprehensive plan update that addresses key topics such as housing, economic development, livability and environmental stewardship. We understand that the City has limited resources and staff capacity. 3J proposes a work plan that actively engages advisory groups to reach a broad spectrum of Carlton residents, and utilizes our extensive experience to effectively execute the process.

WE DISTINGUISH OURSELVES IN THREE KEY WAYS:

A CREATIVE AND TAILORED APPROACH

We understand that the end of a planning horizon is looming and the current Comprehensive Plan is due for a fresh look. The City is armed with the information and support needed to make the Comprehensive Plan Update a top priority. With an ambitious timeline, we have developed a unique, responsive approach. This builds on a foundational understanding of Comprehensive Plan work in Oregon, as well as different methods and structures of engagement. More specifically, we will front-load community engagement efforts to maximize the depth and breadth of our outreach. By reaching out early and often, we ensure meaningful input through an iterative process.

AN ENTHUSIASTIC AND EXPERT TEAM

Our deep expertise and experience with long-range, comprehensive planning and community engagement make us poised to lead this effort. We are an enthusiastic, dedicated and creative team that is process-oriented and collaborative. Plus, we have a deep appreciation for our work and are passionate about serving communities in places we also love to enjoy. We recently updated Redmond’s comprehensive plan, will complete an update for Sherwood in October, and are underway in Oregon City and Sandy. Our team has assisted ten communities with visioning and comprehensive planning services since 2010.

OUR PHILOSOPHY

It is our philosophy that residents and stakeholders are the community experts. They know the local needs, strengths, weaknesses, and the development potential. As consultants, our job is to complement that knowledge and expertise with new ideas, a fresh perspective, and the experience that we have acquired in working with communities across the country. This approach serves our belief that one size does not fit all in planning. Instead, our team offers its vast experience developing innovative and implementable strategies for citywide comprehensive plans and our passion for revitalization and development to serve the City. Together—through collaborative and respectful working relationships between our team, City staff, and technical and stakeholder groups—we will provide a creative vision, policy framework and implementable tools to catalyze desired changes and best serve the residents and businesses of Carlton.

3J'S VISION AND COMPREHENSIVE PLAN EXPERIENCE

STARTED	JURISDICTION	VISION	COMP PLAN
2021	Sandy, OR pop. 11,000	X	X
2021	Oregon City, OR pop. 35,000	X	X
2019	Redmond, OR pop. 30,000	X	X
2019	White Salmon, WA pop. 2,500	X	
2019	Sherwood, OR pop. 20,000	X	X
2016	Milwaukie, OR pop. 21,000	X	
2015	North Plains, OR pop. 3,000	X	X
2015	Camas, WA pop. 23,000	X	
2010	Stevenson, WA pop. 1,500	X	X
2010	Lake Oswego, OR pop. 39,000	X	X

3J's experience updating Vision and Comprehensive Plans for clients of all sizes with varying needs will help us tailor an approach that aligns with the City of Carlton's goals.

ADDITIONAL PROPOSAL



As the “legs” of a comprehensive plan, development code should reflect the spirit and policy direction of the City’s Comprehensive Plan. Connecting the two efforts will result in code provisions that translate the community’s aspirations into tangible results. The City Development Code Update project will be an extension of the Comprehensive Plan Update. 3J is partnering with JET Planning (JET) to provide these additional services to the City of Carlton. 3J and JET have successfully completed many similar projects for clients throughout the region.

Our Approach

We tailor code provisions that translate code into core concepts and policy issues for stakeholders and public audiences, and in turn, address public concerns through effectively drafted code provisions. We facilitate discussions of development code issues incorporating a mix of visual illustrations, background information, and key policy issues that engage the audience in robust discussion which then converts directly into responsive code updates.

Our approach to providing code update services for this project combines conceptual understanding to capture big-picture priorities and technical expertise to implement those concepts through adoption-ready code language. We typically employ an iterative process to draft code updates, beginning with development of key code concepts through to final adoption-ready language. Agreeing on conceptual priorities at the outset helps to focus code-writing efforts and avoid getting lost in subsections and cross-references. At the same time, diving into the specifics of code writing often highlights conceptual issues that may have been overlooked initially, which underscores the importance of an iterative process to revisit these conceptual issues.

OUR TEAM MEMBERS HAVE COMPLETED DOZENS OF CODE AUDIT AND UPDATE PROJECTS FOR CLIENTS THROUGHOUT OREGON AND WASHINGTON.

Our Team

Our understanding of development code is grounded in years of experience as staff for jurisdictions in Oregon and Washington, including North Plains, Oregon City, and Sherwood, OR, and Ridgefield, WA. We have gone on to apply that experience to assist dozens of communities with code update projects to implement comprehensive plans and master planned communities, address changes in legislation, and respond to emerging needs and priorities.

EXPERIENCE, TECHNICAL AND OTHER QUALIFICATIONS



FIRM OVERVIEW

3J Consulting

3J provides clients throughout Oregon with exceptional public involvement, land use planning and civil engineering services based on reliable attention to detail and strong project management. Since its founding in 2009, 3J has helped many communities develop successful long-range development and redevelopment plans, as well as detailed designs for individual sites.

We understand how planning, public involvement and engineering work must be delivered to equally support the goals of local agencies and the character of the communities they serve.

3J's office is located in the Portland Metro area at 9600 SW Nimbus Ave, Suite 100, Beaverton, OR 97008. 3J has 37 employees, including six Planning staff. The 3J team members assigned to the Carlton Comprehensive Plan Update Services project are located in this office. They include:

- Steve Faust, AICP - Principal in Charge
- Anaïs Mathez, AICP - Project Manager
- Christina Winberry – Public Involvement
- Kathleen Freeman, PE, CFM – Water Resources Lead
- Phillip Patague, PE – Water Resources

ADDITIONAL PROPOSAL

With the support of JET, 3J's team will also be able to provide the services outlined in the Additional Project Proposal section of the RFQ.

The team members assigned to help update the City's Development Code are:

- Elizabeth Decker (JET) – Development Code Lead
- Heather Austin, AICP (3J) – Development Code

SUBCONSULTANT OVERVIEW

JET Planning

JET was founded by Elizabeth Decker, who has run the firm as a sole proprietor since 2011 and is registered in Oregon as an LLC since 2017. Elizabeth works out of her office in Portland.

JET provides land use planning services to local governments and private clients in Oregon and Washington, specializing in developing zoning code

provisions that translate identified community priorities into implementable regulations. Over the past 10 years, the firm has developed a broad background in core land use planning from comprehensive planning through development review on behalf of cities, and as an applicant negotiating the land use permitting process. JET's client base is 90% state, city and county governments in Oregon, with the remainder including public clients in Washington, as well as institutions and nonprofit organizations.

Recent project experience has zeroed in on housing development regulations and related policy issues, including regulatory audits around housing issues, and related zoning code amendments to support middle housing development with an emphasis on affordability, accessibility, and clear and objective standards.

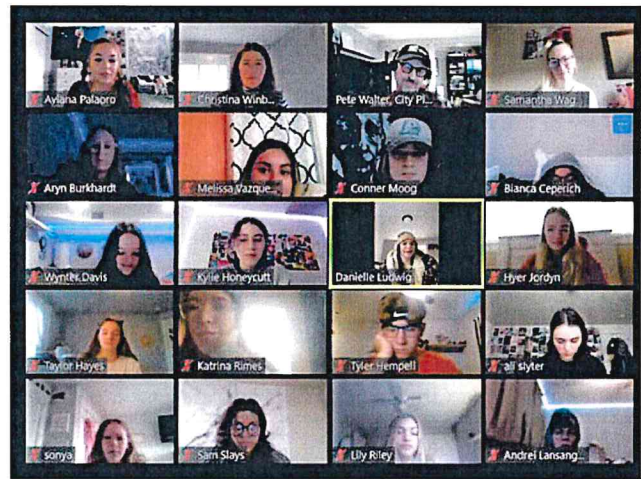
JET and 3J have partnered on dozens of projects and completed 12 residential code audit and update projects together over the past 5 years.

GOVERNMENT CLIENTS

3J has longstanding relationships with government clients. The list below represents current and recent government clients located in Oregon (unless otherwise noted) for whom 3J staff has provided relevant services.

CLIENT	SERVICE	YEAR
City of Cornelius	Town Center Plan On-Call Planning Services	2018 current
City of Grants Pass	Comprehensive Plan and Development Code Update	2021
City of Florence	Residential Zoning and Land Division Code Update	2019
City of King City	Beef Bend South Master Plan	current
City of Lake Oswego	Comprehensive Plan and Vision	2013
City of Lincoln City	Villages at Cascade Head Master Plan	2017
City of Milwaukie	Comprehensive Plan Vision	2016
City of Newberg	Comprehensive Plan and Development Code Update	2021
City of North Plains	Comprehensive Plan and Vision	2014
City of Oregon City	South End Concept Plan Equitable Housing Project Comprehensive Plan and Vision	2010 2018 current
City of Redmond	Neighborhood Revitalization Plan Comprehensive Plan and Vision	2017 2020
City of Roseburg	Model Code Implementation	2021
City of Salem	Multifamily Housing Design Standards Update	2019
City of Sherwood	Sherwood West Concept Plan Comprehensive Plan and Vision	2016 2017 current
City of Silverton	Comprehensive Plan and Development Code Update	2021
City of Talent	Residential Zoning and Land Division Code Update	2019
City of Tigard	Washington Square Regional Center Plan	current
City of Tillamook	Hoquarton Waterfront Plan	2014
Clackamas County Fair	Fairgrounds Master Plan	2018
Coquille Indian Tribe	Comprehensive Plan	2017
Lincoln County	Commons Master Plan	2017
Tillamook County	Cape Kiwanda Master Plan Fairgrounds Master Plan	2015 2016
City of Camas, WA	Comprehensive Plan Vision	2015
City of Stevenson, WA	Comprehensive Plan and Vision	2011
City of White Salmon, WA	Comprehensive Plan Vision	2020

REPRESENTATIVE PROJECTS – COMPREHENSIVE PLAN UPDATE



City of Oregon City, Vision and Comprehensive Plan

3J is leading the development of Oregon City's 2040 Vision and Comprehensive Plan update. The project began with a community-wide visioning process to craft a vision for how to approach development over the next 20 years and guide city decision-making. Through community conversations, online surveys and virtual open houses, the visioning process uncovered key themes and community priorities which will shape the new Comprehensive Plan elements.

3J convenes and manages a 30-member Project Advisory Committee that represents diverse interests and backgrounds, and is leading policy development for the Comprehensive Plan based on its new plan elements. Tasks include facilitating meetings and conducting workshops to identify key concepts for policies and implementation strategies, as well as providing regular project updates to the planning and city commissions.

3J is working with City staff and the advisory committee to draft an updated Comprehensive Plan that will guide City investments and decision-making over the next twenty years.

3J has adapted traditional community engagement strategies to ensure broad participation.



City of Sherwood, Vision and Comprehensive Plan

3J designed, managed and led the City of Sherwood Comprehensive Plan Vision, a city-wide community engagement process that outlined a desired future for the Sherwood community in the year 2040 priorities.

The Visioning Process engaged community members to develop a shared understanding of Sherwood today and set goals for policy development, anchoring a planning process that will address key issues for the future. 3J conducted engagement activities and synthesized feedback from community conversations, stakeholder interviews, online surveys and social media campaigns, two vision summits, and outreach through various city-wide festivals and events. The process had over 1,000 touches with the community over the course of 8 months and resulted in a unanimous acceptance by City Council in January 2019.

Upon successful completion of the vision, 3J was retained to manage and lead the City of Sherwood's Comprehensive Plan update. Following the creation of a vision statement and a set of goals for key topic areas, 3J is leading the development of policies and objectives to realize. In addition, 3J facilitates advisory committees, topic area conferences and outreach activities to identify policy priorities.



Sherwood's Robin Hood Festival is attended by approximately 20,000 people. While working on the Sherwood 2040 Vision, 3J was able to engage hundreds of community members while hosting a tent at the festival.



City of Redmond, Vision and Comprehensive Plan

3J led Redmond 2040, a city-wide effort to update the Redmond Comprehensive Plan. The project kicked off with a robust public engagement program to learn what makes Redmond special, what is important to protect for the future, and what community members would like to see change by 2040. Activities included stakeholder interviews, Community Conversations, tabling at community events and three Redmond Summits. The project resulted in a vision, goals, policies, and implementation measures to guide future growth and development.



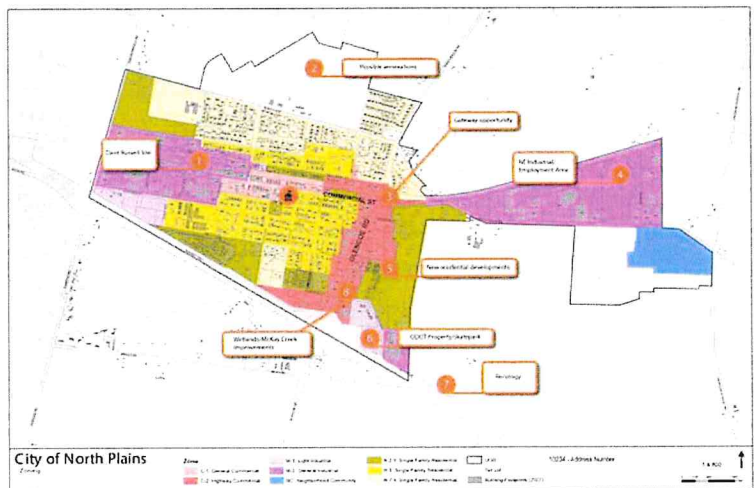
“STEVE AND ANAÏS BOTH HAVE A WONDERFUL ABILITY TO CONNECT WITH PEOPLE AND BRING OUT THE IDEAS THAT WILL SHAPE AND IMPROVE OUR COMMUNITY FOR MANY YEARS TO COME.”

-Deborah McMahon, Planning Manager; City of Redmond



City of North Plains, Vision and Comprehensive Plan

3J assisted the City of North Plains with a three-year process to update the City's comprehensive plan. The first year was a robust community process to create a 20-year vision for North Plains. Tasks included facilitating a Vision Steering Committee, administering two community surveys, conducting community based "community conversations" with a range of community groups and supporting the City to collect surveys and present information at community events. The final vision included focus areas that led directly into the City's comprehensive plan update and the acquisition of three state grants to update the data for specific comprehensive plan elements.



3J worked closely with the City of North Plains to update their comprehensive plan. The 3-year process included robust community engagement, and housing and economic analyses.

In the second and third years, as the City initiated work to update housing and economic analyses, 3J facilitated meetings of the Comprehensive Plan Work Group, reviewing and updating all elements of the comprehensive plan. Each element has been reviewed and approved by the planning commission and city council.



City of Milwaukie, Vision and Action Plan

3J team members assisted the City of Milwaukie with a new Community Vision and Action Plan to guide an update to the City's Comprehensive Plan. Tasks included facilitating a steering committee and advisory committee, conducting stakeholder interviews, developing key messages and a designing a robust community engagement strategy. The strategy included methods for reaching diverse populations through associated translations, conducting community conversations in multiple languages, running a Youth Action Team to canvass local businesses and planning and facilitating two community-wide town halls, complete with childcare and simultaneous translation services. The Community Vision and Action Plan was embraced by the Milwaukie community, City Department Heads and the City Council, and was unanimously adopted in September 2017.

The city's public outreach efforts included:

- 5 fairs and events
- 20 stakeholder interviews
- 30 "Community Conversations" in 2016-17, with more than 500 participants
- 4 online surveys, with more than 500 responses
- 7 Vision Advisory Committee meetings
- Active engagement through its website and on social media



3J led, trained and managed a group of high school students for Milwaukie's Youth Vision Action Team.

THE PROJECT WON THE OREGON CHAPTER OF THE AMERICAN PLANNING ASSOCIATION'S 2017 AWARD FOR PUBLIC INVOLVEMENT.



City of White Salmon, Comprehensive Plan Vision

3J led an effort to create a vision statement for the White Salmon Comprehensive Plan Update. 3J designed and led efforts to engage the White Salmon community in the visioning process. 3J prepared materials for use at a series of community events, starting with a work session for the White Salmon Planning Commission.

Other outreach activities included a booth at the White Salmon Farmers Market and 4th of July Parade and Celebration in the Park, “kits” for Planning Commission members to host their own community conversations and block parties, and an online survey to reach the broader community.

3J developed a draft vision statement tailored to the four focus areas of the Comprehensive Plan and co-facilitated several additional work sessions with the Planning Commission to review and refine the draft vision. The final vision will be approved along with the updated Comprehensive Plan.



3J designed and led efforts to engage the White Salmon community in the visioning process for the City's Comprehensive Plan Update.

ADDITIONAL PROPOSAL

REPRESENTATIVE PROJECTS – DEVELOPMENT CODE UPDATE

City of North Plains, On-Call Land Use Planning

Since 2014, 3J has been providing on-call land use planning services to the City of North Plains. 3J attends every Planning Commission meeting and works closely with the Commission and staff to update the Zoning and Development Code on a regular basis.

3J assisted North Plains in developing and adopting a new Comprehensive Plan in 2019, including updates to the Development Code to implement the new plan. 3J staff stay up-to-date on current state legislation, county regulations and local jurisdictional decisions to ensure Development Code updates are relevant, timely and impactful.

Development Code updates facilitated by 3J in North Plains range from thoughtful balancing of permitted uses and design standards in each zoning district to streamlining the land use review process; from revising provisions for public improvements, floodplains, parks, open space and trails to ensuring orderly and reasonable expansion of the City through standards relating to master planning, concept planning and annexation.



City of Ridgefield, Development Code Rewrite

JET completed a complete rewrite of the development code for this city of 5,000 residents, with emphasis on alignment with the City's new comprehensive plan, introducing design standards including form-based elements, and ease of implementation. The code was developed with significant public input and implemented the City's long-term vision. After initial code adoption, JET continued work with the City of Ridgefield on multiple code updates including annual updates to respond to implementation issues and evolving state requirements and creation of new mixed-use zoning districts.





City of Cornelius, Town Center Master Plan

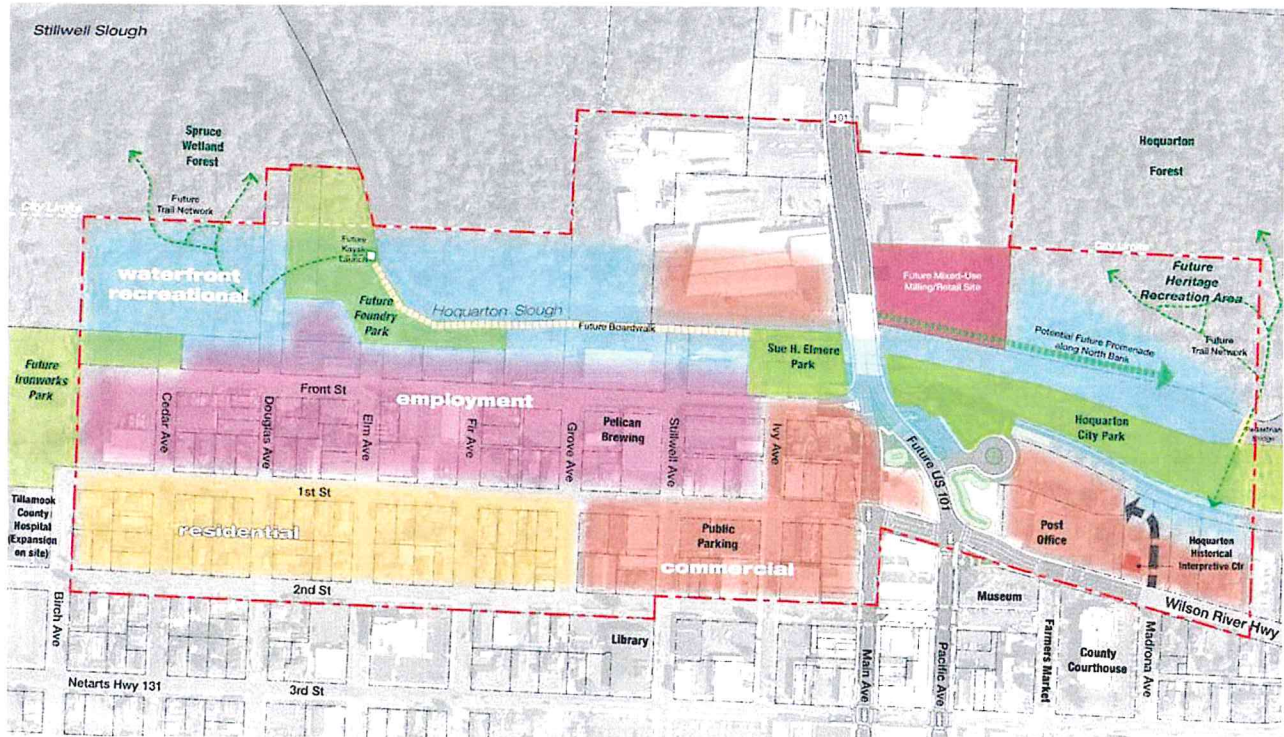
3J and JET worked together on the Cornelius Town Center Master Plan. The Plan establishes a vision for the city's downtown and surrounding neighborhoods linked by a state highway corridor, and which is implemented in part through development code amendments.

The code amendments translate four distinct, interrelated districts into corresponding zones, including simplifying the core elements of the four existing town center zones into one zone that better embodies the functional and design elements prioritized for the subdistrict.

Challenges in the town center core included limited historical building stock, prevailing low rents in the area that did not support significant redevelopment, and a highway bisecting the town center.

The code amendments balance redevelopment potential and maintaining existing businesses by requiring fewer, unifying design elements like weather protection rather than a wide, costly menu of design features designed to keep redevelopment costs lower. The code also built on economic analysis to "right-size" development for the market to support nearer-term development.

**THE PROJECT WON THE OREGON
CHAPTER OF THE AMERICAN PLANNING
ASSOCIATION'S 2019 AWARD FOR
PUBLIC INVOLVEMENT.**



Tillamook County, Hoquarton Waterfront Master Plan

3J led a consultant team to assist the City of Tillamook with a plan to guide redevelopment along the City's historic downtown along the Hoquarton Slough.

JET developed new zoning code provisions and zoning map amendments to implement preferred development scenarios for a mixed-use industrial area adjacent to downtown. The Hoquarton Overlay zone implements the plan goals for an integrated, compact, mixed-use neighborhood with a balanced transportation network that provides safe and attractive access to and from destinations for work, live and play.

Spanning commercial, industrial and residential areas and bisected by a state highway, the overlay zone integrated use, dimensional and design standards to guide integrated development and redevelopment. The code integrated innovative design elements that embraced the grittier, industrial aesthetic of the district, rather than attempting to bury it behind conventional facades, providing a lesson in how code standards can reflect and refine an existing district identity.

The project spanned from early 2015 to early 2016; JET worked with 3J to incorporate technical expertise, community planning goals, and design aesthetics into implementable code regulations.



City of Oregon City, Equitable Housing Policy Project

3J and JET partnered to complete a code audit and update promoting middle housing development opportunities. The code audit informed code updates to spur development of a wide range of housing types to ease housing affordability and availability concerns.

Identified code concepts centered around expanding middle housing types designed for compatibility with the city's existing neighborhoods and resident's evolving needs, maintaining and expanding higher density residential and mixed-use opportunities, and simplifying design and approval criteria to focus on community priorities.

Code concepts and language was drafted through an iterative process to integrate review comments from City staff, stakeholders and the general public, and expert project advisors. Code amendments were developed with significant public input in the form of two advisory committees, stakeholder interviews, open houses and workshops, and online surveys.

3J AND JET COMPLETED A CODE AUDIT AND UPDATE TO PROMOTE MIDDLE HOUSING DEVELOPMENT OPPORTUNITIES IN THE CITY OF OREGON CITY.

PROJECT TEAM



STEVE FAUST, AICP ROLE: PRINCIPAL-IN-CHARGE

Steve is a land use planner with nearly 20 years' experience as a facilitator and community engagement specialist. As a public engagement specialist, Steve has led dozens of public involvement processes for diverse audiences. He is responsible for the oversight of all public involvement tasks from developing public involvement plans, to designing and coordinating implementation of public outreach activities, to documenting and evaluating the effectiveness of those efforts. Steve is an experienced designer of community questionnaires and manager of online tools designed to gather comments from people who prefer virtual forms of participation. He recently led an award-winning public engagement process for the Cornelius Town Center Plan. Steve is a current member and Acting Chair of the Oregon Citizen Involvement Advisory Committee. He is a Public Involvement Provider for the Oregon Department of Justice Alternative Dispute Resolution program.



Education

M.S. in Urban & Regional Planning,
Portland State University

B.S. in Peace Studies, St. Johns
University, Minnesota



Registrations

American Institute of Certified
Planners (AICP)



Affiliations

American Planning Assoc. Oregon
Chapter

Senior-Level Public Policy Facilitator,
Oregon Consensus

Public Involvement Provider, Oregon
Department of Justice Alternative
Dispute Resolution

Chair, Oregon Land Conservation &
Development Commission Citizen
Involvement Advisory Committee

Relevant Experience

- Oregon City Vision and Comprehensive Plan; Oregon City, OR

- Sherwood Vision and Comprehensive Plan; Sherwood, OR

- Redmond Vision and Comprehensive Plan; Redmond, OR

- North Plains Vision and Comprehensive Plan; North Plains, OR

- Cornelius Town Center Plan; Cornelius, OR

- Washington Square Regional Center; Tigard, OR

- Comprehensive Plan Update Facilitation; City of Portland

- Lake Oswego Comprehensive Plan Update; Lake Oswego, OR

- Camas Comprehensive Plan Vision; Camas, WA

- White Salmon Comprehensive Plan Vision; White Salmon, WA

- Stevenson Comprehensive Plan Update; Stevenson, WA

- City of Yachats Comprehensive Plan Update, Yachats, OR



ANAÏS MATHEZ, AICP

ROLE: PROJECT MANAGER

Anaïs works in various capacities as a project manager, facilitator, engagement specialist and writer. She helps prepare for and conduct public meetings, outreach activities and communications that engage diverse groups and a variety of stakeholders for communities across the state. Anaïs is experienced in facilitating meetings ranging from small focus groups and to large workshops. She excels at developing materials and presentations that use images and simple language to communicate complex ideas. She has led comprehensive planning processes around the state and conducted award-winning public engagement for both the Milwaukie Vision and Action Plan and the Cornelius Town Center Plan.



Education

Master of Urban & Regional Planning (MURP), Portland State University

Bachelor of Science in Geography and Environment, McGill University, Quebec, Canada



Registrations

American Institute of Certified Planners (AICP)



Affiliations

American Planning Association, Oregon Chapter (OAPA)

American Planning Association of Oregon, Legislative and Policy Affairs Committee (LPAC)

Northwest Trail Alliance (NWTA)

International Mountain Bike Association (IMBA)

American Alpine Club (AAC)

Relevant Experience

- Oregon City Vision and Comprehensive Plan; Oregon City, OR

- Sherwood Vision and Comprehensive Plan; Sherwood, OR

- Redmond Vision and Comprehensive Plan; Redmond, OR

- Milwaukie Community Vision and Action Plan; Milwaukie, OR

- Cornelius Town Center Plan; Cornelius, OR

- Washington Square Regional Center; Tigard, OR

- Equitable Housing Policy Analysis and Code Update; Oregon City, OR

- Sherwood Housing Needs Analysis (HNA) and Economic Opportunities Analysis (EOA); Sherwood, OR

- Oregon DLCDC Housing Needs, Residential Code Update; Talent, OR

- Oregon DLCDC Housing Needs, Residential Code Audit; Bandon, OR

- Oregon DLCDC Housing Needs, Residential Code Update; Springfield, OR



CHRISTINA WINBERRY

ROLE: COMMUNITY ENGAGEMENT LEAD



Education

Master of Urban & Regional Planning (MURP), Portland State University

Bachelor of Arts in Anthropology and Growth/Structure of Cities, Bryn Mawr College



Affiliations

International Association of Public Participation, Cascades Chapter (IAP2)

American Planning Association, Oregon Chapter (OAPA)

Christina is a land use planner and community engagement practitioner focused on long-range planning projects. She conducts research, writes reports, prepares outreach materials, participates in engagement activities, and provides mapping and graphic design support for a multitude of long-range planning projects. Christina is currently assisting with the Oregon City Comprehensive Plan Update.

While a graduate student at PSU, Christina worked with the City of Sandy as a Long-Range Planning Intern. She led Sandy's Downtown Walkability Assessment, researched updates to the Comprehensive Plan, partnered with stakeholders to write Sandy's Safe Routes To School Competitive Construction Grant, and assisted with current planning efforts.

Relevant Experience

- Oregon City 2040 Comprehensive Plan Update and Vision; Oregon City, OR
- Grants Pass Housing Needs Analysis and Model Code; Grants Pass, OR
- North Plains UGB Expansion; North Plains, OR



KATHLEEN FREEMAN, PE, CFM

ROLE: WATER RESOURCES LEAD

Kathleen leads 3J's Water Resources and Flood Plain Management services. She has worked extensively in the northwest for public agencies, including Cities of Beaverton, Newberg, and Independence; Hillsboro School District, Tualatin Hills Parks & Recreation District and Washington County. With more than 17 years of experience, Kathleen designs low impact stormwater management systems, prepares watershed analyses including capacity analysis, modeling of channels and floodplain/floodways, and downstream analyses.

Kathleen recently assisted the cities of Talent and Phoenix and Jackson County with their floodplain development permit needs.



Education

Bachelor of Science in
Environmental Engineering,
Oregon State University



Registrations

Professional Civil Engineer –
Oregon, Washington, Hawaii,
Texas, Massachusetts and New York
Certified Floodplain Manager



Affiliations

Association of State Floodplain
Managers

Relevant Experience

- DLCD Wildfire Assistance; Talent, OR
- DLCD Wildfire Assistance; Talent, OR
- City of Beaverton Stormwater Modeling; Beaverton, OR
- City of Independence, Airport Drainage Analysis; Independence, OR
- City of Independence Stormwater Master Plan; Independence, OR
- Stevens Creek Realignment; Happy Valley, OR
- THPRD, Raleigh Swim Center Flood Control; Portland, OR
- THPRD, McMillan Park Stream Restoration; Beaverton, OR
- Riverwood Road No-Rise Certification; Portland, OR
- Barfield Residence Flood Plain Alteration; Hillsboro, OR
- CalFarms No Rise Certification, Clackamas, OR



PHILLIP PATAGUE, PE

ROLE: WATER RESOURCES



Education

Bachelor of Science in Civil Engineering, San Diego State University



Registrations

Professional Civil Engineer – California, Oregon



Affiliations

ASCE Oregon - EWRG

APWA Young Professionals - Oregon Chapter

Chi Epsilon Honor Society

Phillip is a Water Resources Engineer experienced in preparing Stormwater Management Reports. He has over 7 years of experience in the design and analysis of Water Quantity, Water Quality, Low Impact Development and Hydromodification Best Management Practices. Phillip's experience with hydromodification has been valuable to 3J. He educates his coworkers and clients through presentations and has created complementary design tools.

Phillip provided floodplain development permit support for the cities of Talent and Phoenix and Jackson County.

Relevant Experience

- DLCD Wildfire Assistance; Talent, OR

- DLCD Wildfire Assistance; Talent, OR

- Washington County, NW Walker Rd. 173rd to 185th Widening; Beaverton, OR

- E. Crestview Drive Improvements; Newberg, OR

- Highway 99 Frontage Improvements & Crestview Drive Signal Upgrade; Newberg, OR

- Washington County, 209th and Johnson; Aloha, OR

- Washington County URMD, Alden Street - 74th to 80th; Washington County, OR

- City of North Plains, On-Call Civil Engineering; North Plains, OR

- City of Oregon City, 2021 Waterline Extension; Oregon City, OR

- West Linn Wilsonville School District, West Linn High School Stadium Improvements; West Linn, OR

- Hillsboro School District Transportation Facility; Hillsboro, OR

ADDITIONAL PROPOSAL



ELIZABETH DECKER

ROLE: DEVELOPMENT CODE LEAD

Elizabeth Decker is a land use planner specializing in consulting for public and private clients in the Pacific Northwest for the past ten years. She founded JET Planning in 2011 and operates as a woman-owned, sole-proprietor firm. Her area of expertise focuses on drafting development code, informed by her experience implementing development regulations on both sides of the counter as an applicant and city contract planner, and her background with comprehensive planning, sub-area and specialty plans, and public engagement. She has developed a nuanced understanding of policy and regulatory approaches needed to support a range of middle housing types, particularly zoning, design and development review requirements.



Education

Master of Urban & Regional Planning (MURP), Portland State University

Bachelor of Arts in Anthropology and Growth/Structure of Cities, Bryn Mawr College



Affiliations

International Association of Public Participation, Cascades Chapter (IAP2)

American Planning Association, Oregon Chapter (OAPA)

Relevant Experience

- Development Code Rewrite; Ridgefield, WA
- Town Center Plan, including new mixed-use and residential zoning districts; Cornelius, OR
- Equitable Housing Policy Project, including code audit and amendments; Oregon City, OR
- Hoquarton Waterfront Master Plan; Tillamook County, OR
- Beaver Creek Road Concept Plan Implementation, including code audit and amendments; Oregon City, OR
- Housing Code Update, Talent, OR
- Multifamily Housing Design Standards, Salem, OR
- Needed Housing Code Update, Florence, OR
- Affordable Housing Code Assistance, Bandon, OR



HEATHER AUSTIN, AICP

ROLE: DEVELOPMENT CODE



Education

M.S. in Urban & Regional Planning,
Portland State University

B.S., Oregon State University



Registrations

American Institute of Certified
Planners (AICP)



Affiliations

American Planning Association,
Oregon Chapter (OAPA)

Heather has more than 15 years of experience in land use planning and community development, including development review and long range planning for local governments, non-profit community outreach organizations, and aviation developments. Heather loves the dynamic and diverse nature of her work – she has managed projects ranging in size from single-business site design to a 300-acre mixed-use concept plan. Heather has also managed complex updates to local development codes compliant with regional and state land use laws and regulations, drawing on her experience to help clients find elegant and practical solutions to project challenges. Prior to joining 3J in 2012, Heather worked for 7 years as a planner for the City of Sherwood.

Relevant Experience

- City of Cornelius, On-Call Planning, Cornelius, OR

- City of North Plains, On-Call Planning, North Plains, OR

- City of Sherwood, On-Call Planning, Sherwood, OR

- Columbia County, On-Call Planning, Columbia County, OR

- City of North Plains, Development Code Amendments, North Plains, OR

- Commercial Design Standards Code Update, Sherwood, OR

- Infill and Redevelopment Design Standards, Sherwood, OR

- Oregon City South End Concept Plan, Oregon City, OR

- Sherwood Lofts Design Review, Sherwood, OR

- Tonquin Employment Area, Sherwood, OR

LIABILITY INSURANCE COVERAGE

3J understands the importance of insurance and carries limits in excess of industry standards for our size of firm. 3J currently has General Commercial Liability insurance, Worker’s Compensation Insurance, Automobile insurance, and Professional Liability insurance.

- General Liability - \$2,000,000 Per Occurrence/\$4,000,000 Aggregate Limit
- Worker’s Compensation - \$1,000,000 Each Accident/\$1,000,000 Each Disease, Each Employee/\$1,000,000 Each Disease, Policy Limit
- Automobile Liability - \$2,000,000 Each Accident – Combined Single Limits
- Professional Liability - \$2,000,000 Each Claim/\$3,000,000 Aggregate Limit
- Umbrella - \$3,000,000 Each Occurrence/\$3,000,000 Aggregate Limit

RESPONSE TO SCOPE OF CONSULTANT SERVICES

We understand that the current Comprehensive Plan adopted in 2000 does not adequately prepare the City for expected growth. The Carlton Comprehensive Plan will include a 20-year vision, goals and policies that will address Oregon Statewide Planning goals and topics such as housing and affordability, recreation, economic development, sustainability, resilience to natural hazards, transportation, infrastructure, and historical preservation. The following is a proposed scope of work to develop the Comprehensive Plan to prepare Carlton for the next 20 years.

SCOPE OF WORK

Task 1. Project Management

TASK 1.1 PROJECT KICKOFF

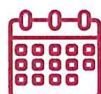
The 3J team will prepare for and participate in a kickoff meeting with Carlton staff to review and refine the scope of work, deliverables, schedule and budget, and agree on roles and responsibilities and communications protocols. Generally, City staff will be responsible for providing direction and guidance throughout, reviewing deliverables, convening stakeholders, and organizing meeting notices and logistics. We estimate staff spending approximately ten hours per month for these activities. We will agree on a preliminary list of key stakeholder groups and discuss of public engagement and communications tools and strategies.



• Deliverables:

Consultant:

- Kickoff meeting agenda and notes
- Refined scope of work, schedule, budget, roles and responsibilities



• Timeline: November 2021

TASK 1.2 PROJECT ADMINISTRATION

Throughout the process, the 3J project manager will hold bi-weekly project management phone calls to track progress on key tasks and deadlines, identify unanticipated issues and develop alternative approaches as needed. To ensure accountability and conformance with the project budget, we will prepare monthly progress reports and invoices that describe the activities undertaken, estimate the percent completion of each task, and track expenditures and hours.



• Deliverables:

Consultant:

- Bi-weekly call agendas and notes
- Monthly progress reports, invoices

City:

- Participate in bi-weekly calls



• Timeline: November 2021 – October 2022

Task 2. Community and Stakeholder Engagement

The 3J Team will prepare a Community Engagement Plan to guide outreach efforts throughout the vision process. We will encourage community-wide participation by providing many opportunities for public exchange in a variety of formats and locations. The Plan will capitalize on existing City mechanisms for community engagement; establish community engagement objectives; identify the diverse set of stakeholders; and describe the array of tools and activities best suited to inform and engage stakeholders. 3J will provide a detailed written summary of community engagement results.

The Plan also will identify methods of communication to keep community members up-to-date with the project, and notifying residents, businesses and other stakeholders about opportunities to be actively involved in Comprehensive Plan update process. We will conduct kickoff meetings with a Community Advisory Committee and Technical Advisory Committee to introduce the Comprehensive Plan process, discuss key issues and review draft Community Engagement Plan elements.

Public involvement and communications tools and activities include, but are not limited to:

PROJECT ADVISORY COMMITTEES

Community Advisory Committee

A successful Vision and Comprehensive Plan process must create a shared sense of ownership among the Carlton community. We will convene and facilitate four meetings of a Community Advisory Committee (CAC) that represents a broad cross-section of community interests, formed by City staff with guidance from the team. The CAC will review and comment on work products, guide engagement efforts and help the 3J team host public outreach events and activities, act as liaisons to specific constituencies or interest groups, encourage community members to participate in the process, and act as champions of the ultimate Carlton Vision and Comprehensive Plan that emerges from this process. The 3J Team will develop a CAC charter that establishes roles, shared ground rules and decision-making procedures.

Technical Advisory Committee

City staff will form a Technical Advisory Committee (TAC) to work alongside the CAC, reviewing project materials and advising on technical issues throughout the project. The TAC will consist of agency partners and service providers and meet four times, often on the same day as the CAC.

For each CAC and TAC meeting, 3J will prepare agendas and other meeting materials. The City will be responsible for communication with members, coordinating meeting logistics, printing materials and preparing meeting summaries.

Community Conversations and Interviews. We recommend taking the vision process out to community groups through a series of Community Conversations. These conversations will prioritize “going to where people are” – both in meetings and online, focusing on the spaces where people gather and the channels through which they receive information. Community Conversations should be held with a broad spectrum of business, educational, neighborhood, civic and faith-based organizations.

In addition to conducting up to seven (7) conversations, we will prepare Community Conversation Kits for use by community members and train CAC members to conduct their own conversations. The conversations will provide the community with information about the project and engage them in discussion about what they value about Carlton today and what could make it a better place to live in the future. We propose working with local partners to reach communities that would not normally participate in the process.

Community Events. Community events provide a unique opportunity to engage a large number of people in one place. Community Events may include the Carlton Crush Harvest Festival, Fun Days, National Night Out, and others. We will use a variety of activities ranging from an informational booth to intercept interviews. Activities will be designed to create awareness of the project and engage youth and adults in identifying what they love about Carlton today and what they would change to make Carlton an even better place to live, work and play in the future. 3J staff and CAC members will be the primary staff at these events and 3J will participate in up to five (5) events.

Carlton Summits. 3J will work with City staff and the CAC to host three Carlton Summits. These fun and engaging community events are the main opportunities for Carlton community members to engage and share ideas with their neighbors face-to-face.

Online Engagement. We will develop up to three online engagements to supplement in-person public involvement activities. The engagements will provide an alternative avenue to comment for those who may not come to a meeting or feel comfortable voicing their opinions among others. The online open houses or questionnaires will coincide with each round of public involvement.

PLANNING COMMISSION AND CITY COUNCIL BRIEFINGS

Working with staff, we will provide up to (4) regular updates to Planning Commission and City Council throughout the process. These briefings are important touchpoints to ensure elected and appointed officials are engaged in the process and eventual recommendations are supported. The first briefing will coincide with CAC/TAC Meeting #1 introduce the Comprehensive Plan process, discuss key issues and review draft Community Engagement Plan elements.

COMMUNICATION TOOLS

We will work with City staff to use a variety of methods to notify residents about public events and other opportunities to be involved in the process. We seek a proper balance between these tools in order to achieve maximum engagement:

Comprehensive Plan logo. At the outset of the project, we will create a project identity that is unique and compelling. This “look” will appear on all project materials and provide continuity and visibility for the Comprehensive Plan process.

Project Website. The 3J Team will design and administer an informative and accessible website. 3J will develop content for the site including project overview and timeline, important contacts, schedules for public events, opportunities for public engagement, updates on the project’s status, and the ability to view or download documents.

Social media. Our team is well acquainted with social media services that supplement traditional public relations and media approaches. We will provide City staff with content for their social media platforms, such as Facebook and Twitter accounts to increase project awareness and provide multiple avenues for community input.

Media contacts. We will prepare media releases to the Yamhill/Carlton News-Register and other local media outlets for the City to distribute.

Public information materials. We will prepare flyers, newsletters, facts sheets and other materials to educate and inform the public.

Electronic mailing list. The City will maintain a database of e-mail addresses of people who express interest in the planning process. We will prepare e-blasts for the City to distribute to help notify people about events and activities. Interested parties will have several opportunities to join the mailing list, such as on the project website and at public meetings and events.



Deliverables:

Consultant:

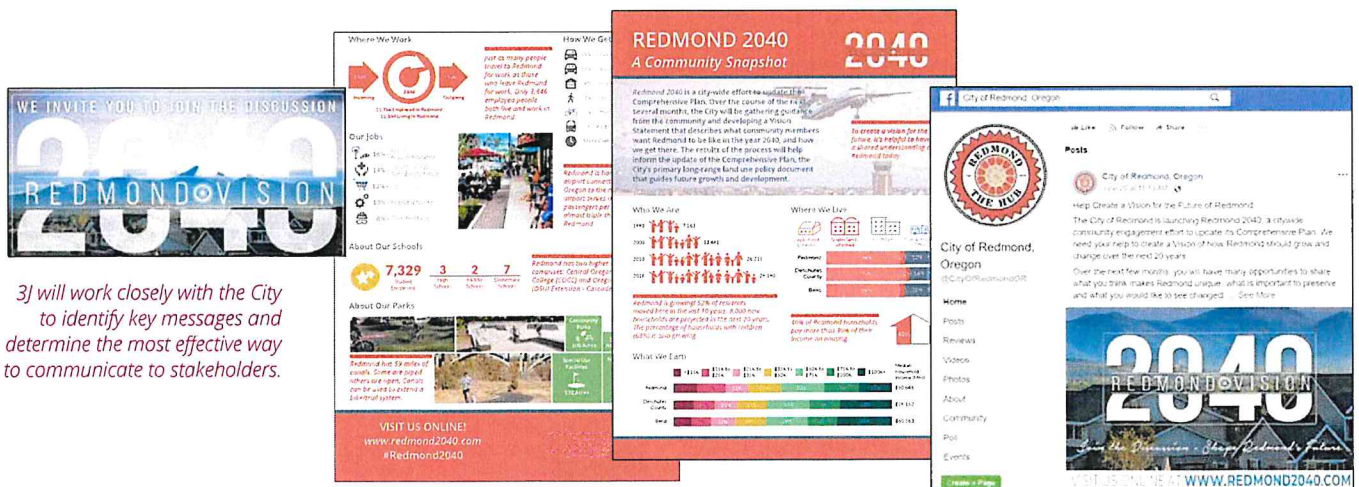
- Draft and final Community Engagement Plan
- Outreach and communications materials
- Project Website
- CAC/TAC Meeting #1 and materials
- Joint PC/CC Worksession #1 materials and presentation

City:

- Coordinate CAC and TAC meetings
- Review and comment on Draft Community Engagement Plan
- Develop meeting notices and logistics for CAC/TAC Meeting #1
- Prepare CAC/TAC Meeting #1 summary



Timeline: November 2021 – October 2022



3J will work closely with the City to identify key messages and determine the most effective way to communicate to stakeholders.

Task 3. Background Report / Carlton 2042 Vision

3.1 BACKGROUND REPORTS

The 3J team will research comprehensive plan elements through the review of relevant documents, such as the existing adopted Comprehensive Plan, Transportation System Plan (TSP), Economic Opportunities Analysis (EOA), and Housing Needs Analysis (HNA). We also will collect relevant demographic and socio-economic data. We will work with City staff to reach out to appropriate City departments to learn about current activities and future plans.

Information from these sources will be used to prepare a background report for each comprehensive plan element that describes the element and underlying topics as they relate to the City of Carlton: *What are the City's assets? 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 reports will be written in accessible language and use a combination of narrative, maps, tables and graphics to convey key information. A portion of the information will ultimately be used in the Comprehensive Plan itself. The consultant team also will prepare a one-page, infographic-rich topic profile to make the information more accessible to the public. This information will be compiled into a Community Profile for use at Carlton Summit #1 and distributed widely through various online and City mechanisms.



— Deliverables:

Consultant:

- Draft and final background reports
- Draft and final Community Profile

City:

- Compile relevant data and plans for inclusion in the Background Reports
- Review and comment on Draft Background Reports
- Review and comment on Draft Community Profile



— Timeline: November 2021 – January 2022

3.2 CARLTON 2042 VISION

Creating a community vision and goals is an iterative process beginning with broad sets of information and refining them over time. Concurrent with the collection and analysis of background information, the first round of outreach activities, as described in the Community Engagement Plan, will focus on the Carlton 2042 Vision. We will ask the community open-ended questions about what they like about Carlton today and what could be improved in the future. We will extend these questions that align with Oregon Statewide Planning Goals/comprehensive plan elements, such as housing, economic development and parks and recreation. The 3J team will organize the information gathered into Comprehensive Plan “topic areas”. This information will be the foundation of the Comprehensive Plan Vision.

Following review from City staff, the consultant will revise the background reports, topic profiles and draft Comprehensive Plan Vision. These materials will be refined before presentation to the CAC and TAC for their revisions. We will then host Carlton Summit #1, where community members will review and comment on the draft Vision Statement and participate in discussions to identify preliminary goals for each topic area. This hands-on event will combine education and dialogue about the big questions facing the City, such as housing, livability, economic development, natural resource preservation and conservation, among others. The Summit will be supplemented by an online tool for community input.



— Deliverables:

Consultant:

- Draft Vision Statement
- CAC/TAC Meeting #2 and materials
- Joint PC/CC Worksession #2 materials and presentation
- Carlton Summit #1, materials and media content
- Online questionnaire to collect additional community input

City:

- Review and comment on Draft vision
- Develop meeting notices and logistics for CAC/ TAC Meeting #2
- Prepare CAC/TAC Meeting #2 summary
- Launch Carlton Summit #1 media content, manage meeting logistics
- Review online questionnaire



— Timeline: January – March 2022

Task 4. Goals and Policies

We will use information gathered in Task 3 to make needed revisions to the Vision, and draft broad goals for the various Comprehensive Plan elements. The second round of outreach will focus on identifying community priorities based on the overarching Vision and draft goals. We will vet and refine draft goals with the CAC and TAC to ensure we are on the right track and asking pertinent questions. At Carlton Summit #2 and through an online engagement tool, participants will validate the vision and draft goals, and identify ideas and approaches that will shape policy concepts and implementation strategies. Topics may be framed through the Great Neighborhood Principles and include ideas around: housing affordability, parks and amenities, green energy and water conservation, digital infrastructure, multimodal safety and connectivity, and civic engagement. Following Carlton Summit #2, we will work with City staff, the CAC and TAC to refine the goals and policies that will form the Comprehensive Plan.



Deliverables:

Consultant:

- Final vision statement
- Draft goals and policies
- CAC/TAC Meeting #3 and materials
- Joint PC/CC Worksession #3 and #4 materials and presentation
- Carlton Summit #2, materials and media content
- Online questionnaire to collect additional community input

City:

- Review and comment on draft goals and policies
- Develop meeting notices and logistics for CAC/TAC Meeting #3
- Prepare CAC/TAC Meeting #3 summary
- Launch Carlton Summit #2 media content, manage meeting logistics
- Review online questionnaire



Timeline: March – June 2022

Task 5. Comprehensive Plan

We will create a Comprehensive Plan document that compiles the background reports, vision, goals and policies for each element and ensure that the policies are aligned with Oregon Statewide Planning goals.

In addition to developing policies, we will work collaboratively with City staff to identify any implementation strategies, where applicable, to be compiled in a separate document and used as a framework to guide the implementation of the new Comprehensive Plan in subsequent phases of work.

The Comprehensive Plan document will be visually engaging and easy to read to clearly communicate and illustrate information. The draft Comprehensive Plan will be presented to the CAC and TAC at their final meeting for their review and comment. Carlton Summit #3 will use an open house format to provide the public with a final opportunity to review and comment on all aspects of the draft Comprehensive Plan. Following Summit #3, we will refine the Plan to reflect community input.



Deliverables:

Consultant:

- Draft and revised Comprehensive Plan
- CAC/TAC Meeting #4 and materials
- Carlton Summit #3, materials and media content
- Online questionnaire to collect additional community input
- Implementation Strategies Memo

City:

- Review and comment on draft and revised Comprehensive Plan
- Develop meeting notices and logistics for CAC/TAC Meeting #4
- Prepare CAC/TAC Meeting #4 summary
- Launch Carlton Summit #3 media content, manage meeting logistics
- Review online questionnaire
- Review and comment on Implementation Strategies Memo



Timeline: June – August 2022

Task 6. Adoption

The Comprehensive Plan Vision, goals and policies represent a significant amount of information for the Planning Commission and City Council to digest. While we will be briefing these officials throughout the process, a thoughtful and measured adoption process is needed to facilitate their understanding, input and support.

We propose breaking up the Comprehensive Plan into two groupings of chapters to be reviewed at a series of joint Planning Commission and City Council work sessions. Once final refinements are made, a final draft of the Comprehensive Plan will be presented at two hearings; one for the Planning Commission and one for the City Council. Having already reviewed the draft policies and background information for each of the topic areas, these bodies will be familiar with the complete Comprehensive Plan document for adoption.



Deliverables:

Consultant:

- Two Planning Commission/City Council work sessions and presentations
- One Planning Commission hearing and presentation
- One City Council hearing and presentation

City:

- Prepare all relevant meeting notices, staff reports and ordinances
- Participate in Planning Commission and City Council Adoption Hearings



Timeline: August – October 2022

PROJECT SCHEDULE

		2021		2022									
TASK		NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT
1	Project Management												
1.1	Project Kick-off	▲											
1.2	Project Administration												
2	Community and Stakeholder Engagement		●										
3	Background Reports/Carlton 2045 Vision		■										
3.1	Background Reports												
3.2	Carlton 2042 Vision				●	◆							
4	Goals and Policies				■			●	◆	■			
5	Comprehensive Plan									●	◆		
6	Adoption										■	■	■

- ▲ Team Kickoff
- CAC/TAC Meetings
- ◆ Carlton Summits
- PC/CC Briefings, Worksessions, Hearings

ADDITIONAL PROPOSAL



Photo from Visit Carlton/Facebook

SCOPE OF WORK

We understand that Carlton’s Development Code no longer reflects the needs and zoning desires of the City and will need to be updated following completion of the Comprehensive Plan Update. In addition to any changes that emerge through the Comprehensive Plan Update process, the City described several areas of focus in the RFP. We believe that updating the code to reflect the City’s Comprehensive Planning priorities will be an important implementation step to translate the vision into built form. The following is a proposed scope of work to implement Comprehensive Plan policies and address identified development goals.

Task 1. Project Management

TASK 1.1 PROJECT KICKOFF

The 3J Team will prepare for and participate in a kickoff meeting with Carlton staff to review and refine the scope of work, deliverables, schedule and budget, and agree on roles and responsibilities and communications protocols. We will agree on a preliminary list of key stakeholder groups and review public engagement and communications tools and strategies.

TASK 1.2 PROJECT ADMINISTRATION

Throughout the process, the 3J project manager will hold bi-weekly project management phone calls to track progress on key tasks and deadlines, identify unanticipated issues and develop alternative approaches as needed. To ensure accountability and conformance with the project budget, we will prepare monthly progress reports and invoices that describe the activities undertaken, estimate the percent completion of each task, and track expenditures and hours.



Deliverables:

Consultant:

- Kickoff meeting agenda and notes
- Refined scope of work, schedule, budget, roles and responsibilities

City:

- Participate in kickoff meeting



Timeline: November 2022



Deliverables:

Consultant:

- Bi-weekly call agendas and notes
- Monthly progress reports, invoices

City:

- Participate in bi-weekly phone calls



Timeline: Ongoing

Task 2. Existing Conditions (Code Audit)

The 3J Team will work with City staff to identify and review all applicable background materials including the Comprehensive Plan, housing and economic studies, existing development code, applicable state planning regulations, and any previous audits or analysis of code. We will discuss key provisions from the comprehensive plan and priority areas of focus for the City, and analyze existing code for opportunities to address those priorities. The audit will be supplemented through stakeholder interviews and a review with City staff to understand how code is functioning for identified priorities. We will summarize findings in an existing conditions memo, and finalize draft memo with any review comments from City staff. The Project Advisory Committee (PAC) will review and comment on the memo at their first meeting to build a common understanding and platform for code updates.



Deliverables:

Consultant:

- Draft and final Code Concepts memo
- PAC meeting materials
- Public workshop materials
- Summary of online questionnaire results

City:

- Review of draft Code Concepts memo



Timeline: January through March 2023



Deliverables:

Consultant:

- Draft and final Existing Conditions memo
- PAC meeting materials

City:

- Provide Consultant with relevant materials
- Meeting to discuss current code provisions
- Review of draft Existing Conditions memo



Timeline: November through December 2022

Task 3. Code Concepts

We will develop initial suite of code concepts to address needs, community priorities, and compliance requirements identified in the previous task. Code concepts are not presented in code language at this phase in order to keep the focus on the desired content and outcomes of the code, in a format that a broader group of stakeholders can engage with. Work at this stage may also include consideration of the overall code format, whether to work within the existing structure or reorganize the code to better align with desired outcomes. We will review concepts with the PAC, and gather community input through a Public Workshop and online questionnaire to refine initial concepts and generate additional concepts as needed. The 3J Team will summarize concepts in a written memo, and finalize draft memo with input from public involvement activities and review comments from City staff.



Deliverables:

Consultant:

- Draft code updates
- PAC meeting materials

City:

- Review of draft code updates



Timeline: April through May 2023

Task 5. Final Code Update

The 3J Team will revise draft code updates and companion memos with review comments from the PAC and City staff to develop final code updates. We will develop presentation materials and participate in up to three (3) work sessions of either Planning Commission or a joint work session with Planning Commission and City Council. The work sessions could take place over time throughout the process. We will revise the final code language to respond to any issues raised at the work session.



Deliverables:

Consultant:

- Final code updates
- Presentation materials and presentation at up to three (3) work sessions

City:

- Notification and presentation for one work session



Timeline: May through June 2023

Task 6. Adoption

The 3J Team will support the adoption process by drafting ordinances, findings, staff reports and/or presentation materials for Planning Commission and City Council. We will co-present proposed code standards as needed to respond to issues and comments raised during adoption process. We will co-present updated code language at one (1) Planning Commission hearing and one (1) City Council hearing.



Deliverables:

Consultant:

- Draft ordinances and staff reports
- Presentation materials and presentation at two (2) hearings

City:

- Notification and presentation for two hearings



Timeline: July through August 2023

PROJECT SCHEDULE

TASK	2022		2023							
	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
1 Project Management										
1.1 Project Kick-off	▲									
1.2 Project Administration										
2 Existing Conditions (Code Audit)		●								
3 Code Concepts					●					
4 Draft Code Update							●			
5 Final Code Update							■	■	■	
6 Adoption									■	■

- ▲ Team Kickoff
- PAC Meetings
- ◆ Public Workshop
- PC/CC Briefings, Worksessions, Hearings

REFERENCES



City of Sherwood
Erika Palmer, Planning Manager
503-625-4208
palmere@sherwoodoregon.gov



City of North Plains
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City of Redmond
John Roberts, Deputy City Manager
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City of Oregon City
Laura Terway, Community Development Director
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lterway@orcity.org

ADDITIONAL PROPOSAL



City of Newberg
Doug Rux, Community Development Director
503.537.1212
Doug.Rux@newbergoregon.gov



Clackamas County
Karen Buehrig, Long Range Planning Manager
971.291.8127
Karenb@clackamas.us

COMPENSATION

TASKS	3J CONSULTING							EXPENSE	TOTAL
	SF \$170	AM \$128	HA \$144	CW \$100	KF \$168	PP \$114	AJ \$88		
Task 1. Project Management	16	44	0	2	0	0	12	\$0	\$9,608
<i>Task 1.1 Project Kickoff</i>	4	8		2					\$1,704
<i>Task 1.2 Project Administration</i>	12	36					12		\$7,704
Task 2. Community and Stakeholder Engagement	14	74	0	202	0	0	0	\$2,600	\$34,652
Task 3. Background Reports / Carlton 2042 Vision	18	80	0	134	4	16	0	\$150	\$29,346
<i>Task 3.1 Background Reports</i>	14	52		92	4	16			\$9,036
<i>Task 3.2 Carlton 2042 Vision</i>	4	28		42				\$150	\$4,414
Task 4. Goals and Policies	4	44		32	3	6		\$150	\$10,850
Task 5. Comprehensive Plan	4	32		42				\$150	\$9,126
Task 6. Adoption	4	16	24					\$200	\$6,384
Total Hours	60	290	24	412	7	22	12	-----	827
Total Fees	\$10,200	\$37,120	\$3,456	\$41,200	\$1,176	\$2,508	\$1,056	\$3,250	\$99,966

ADDITIONAL PROPOSAL

TASKS	3J CONSULTING						JET PLANNING			TOTAL
	SF \$170	AM \$128	HA \$144	CC \$100	EXPENSE	SUBTOTAL	ED \$170	EXPENSE	SUBTOTAL	
Task 1. Project Management	2	2	18	5		\$3,688	12		\$2,040	\$5,728
Task 2. Existing Conditions (Code Audit)	1		8	24	\$50	\$3,772	12	\$50	\$2,090	\$5,862
Task 3. Code Concepts	1		11	11	\$100	\$2,954	35	\$100	\$6,050	\$9,004
Task 4. Draft Code Update	1		11	30	\$50	\$4,804	35	\$50	\$6,000	\$10,804
Task 5. Final Code Update	1		8	8	\$175	\$2,297	14	\$150	\$2,530	\$4,827
Task 6. Adoption	2		8	8	\$50	\$2,342	8	\$50	\$1,410	\$3,752
Total Hours	8	2	64	86	-----	160	116	-----	116	276
Total Fees	\$1,360	\$256	\$9,216	\$8,600	\$425	\$19,857	\$19,720	\$400	\$20,120	\$39,977

