

**CITY OF SANDY, OREGON**  
**PERSONAL SERVICES AGREEMENT**

The City of Sandy, Oregon ("City") and 3J Consulting ("Consultant") enter into this Agreement on     December    ,   12th  , 2021 ("Effective Date").

WHEREAS, City and Consultant believe it in their respective and mutual interests to enter into a written Agreement setting out their understandings concerning Consultant's provision of planning services as described in Exhibit A.

**1. Term**

This Agreement shall run from the Effective Date through and including December 1, 2023, unless sooner terminated under the provisions of this Agreement or extended through an amendment.

**2. Consultant's Service**

The scope of Consultant's services and time of performance under this Agreement are set forth in Exhibit "A". All provisions and covenants contained in Exhibit A are incorporated by reference and are a part of this Agreement as if fully set forth. Any conflict between this Agreement and Exhibit A shall be resolved first in favor of this written Agreement. Consultant will, in the rendering of its services to City, use its best efforts and due diligence and provide such personnel as are necessary to successfully provide the services covered under this Agreement. The parties may only change the scope of services through an amendment.

**3. Consultant Identification**

Consultant's employer identification number, as designated by the Internal Revenue Service, is 27-0502115.

**4. Compensation**

City agrees to pay Consultant at the times and in the amounts set out in Exhibit "A". The total amount payable will not exceed Two Hundred Fifty Thousand Nine Hundred Sixty Dollars and No Cents (\$250,960.00).

**5. Project Managers**

City's Project Manager is Kelly O'Neill Jr. Consultant's Project Manager is Anais Mathez. Each party shall give the other written notification of any change in their respective Project Manager.

**6. Project Information**

Consultant agrees to share all project information, to fully cooperate with all corporations, firms, contractors, governmental entities, and persons involved in or associated with the project. No information, news, or press releases related to the project shall be made to representatives of newspapers, magazines, television and radio stations, or any other news medium without the prior authorization of City's Project Manager.

## **7. Duty to Inform**

Consultant shall give prompt written notice to City's Project Manager if, at any time during the performance of this Agreement, Consultant becomes aware of actual or potential problems, faults or defects in the project, any nonconformity with the Agreement, or with any federal, state, or local law, rule or regulation, or has any objection to any decision or order made by City. Any delay or failure on the part of City to provide a written response to Consultant shall constitute neither agreement with nor acquiescence in Consultant's statement or claim and shall not constitute a waiver of any of City's rights.

## **8. Consultant is Independent Contractor**

Consultant is an independent contractor for all purposes and shall be entitled to no compensation other than the compensation expressly provided by this Agreement. Consultant hereby expressly acknowledges and agrees that as an independent contractor, Consultant is not entitled to indemnification by the City or the provision of a defense by the City under the terms of ORS 30.285. This acknowledgment by Consultant shall not affect his/her independent ability (or the ability of his/her/its insurer) to assert the monetary limitations found at ORS 30.270, the immunities listed at ORS 30.265 or other limitations affecting the assertion of any claim under the terms of the Oregon Tort Claims Act (ORS 30.260 to ORS30.300).

## **9. Overtime**

Any person employed on work under this Agreement, other than a person subject to being excluded from the payment of overtime pursuant to either ORS 653.010 to 653.261 or 29 USC§201 to 209, shall be paid at least time and a half for all overtime worked in excess of 40 hours in any one week.

## **10. Indemnity and Insurance**

- i. Indemnity: Consultant acknowledges responsibility for any and all liability arising out of the performance of this Agreement and shall hold City harmless from and indemnify and defend City for any and all liability, settlements, loss, costs, and expenses in connection with any action, suit, or claim resulting or allegedly resulting from Consultant's acts, omissions, activities or services in the course of performing this Agreement.
- ii. Liability Insurance: Consultant shall maintain occurrence form commercial general liability and automobile liability insurance for the protection of Consultant, City, its Councilors, officers, agents and employees. Coverage shall include personal injury, bodily injury (including death) and broad form property damage, including loss of use of property, occurring in the course of or in any way related to Consultant's operations, in an amount not less than Two Million dollars (\$2,000,000.00) combined single limit per occurrence. Such insurance shall name City as an additional insured.
- iii. Errors & Omissions Insurance: Consultant shall maintain professional liability insurance in the amount of not less than \$2,000,000 per claim. Consultant shall keep in force the professional liability policy for at least 24 months after the expiration of the Agreement with City. In any case, Consultant shall notify City in the event of a cancellation or reduction in limits. Unless such cancellation or reduction is immediately cured by Consultant, such cancellation or reduction constitutes a breach of this Agreement.
- iv. Workers' Compensation Coverage: Consultant certifies that Consultant has qualified for

State of Oregon Workers' Compensation coverage for all Consultant's employees who are subject to Oregon's Workers' Compensation statute, either as a carrier-insured employer as provided by ORS 656.407, or as a self-insured employer. Consultant shall provide to City within ten (10) days after Agreement award a certificate of insurance evidencing coverage of all subject workers under Oregon's Workers' Compensation statutes insured by an insurance company satisfactory to City, if any. The certificate and policy shall indicate that the policy shall not be terminated by the insurance carrier without thirty (30) days' advance written notice to City. A copy of the certificate of self-insurance issued by the State shall be provided to City if the Consultant is self-insured.

- v. Certificates: Consultant shall furnish City certificates evidencing the date, amount, and type of insurance required by this Agreement. All policies will provide for not less than thirty (30) days' written notice to City before they may be canceled.
- vi. Primary Coverage: The coverage provided by insurance required under this Agreement shall be primary, and any other insurance carried by City shall be excess.

### **11. Work is Property of City**

All work, including but not limited to documents, drawings, papers, computer programs, and photographs, performed or produced by Consultant under this Agreement shall be the property of City.

### **12. Law of Oregon**

The Agreement shall be governed by the laws of the State of Oregon, without regard to conflict of laws principles. Venue shall be in Clackamas County, Oregon.

### **13. Errors**

Consultant shall perform such additional work as may be necessary to correct errors in the work required under this Agreement without undue delays and without additional cost.

### **14. Extra or Changes in Work**

Only the City Manager or Project Manager may authorize extra (and/or change) work. Failure of Consultant to secure authorization for extra work shall constitute a waiver of all right to adjustment in the Agreement price or Agreement time due to such unauthorized extra work and Consultant thereafter shall be entitled to no compensation whatsoever for the performance of such work.

### **15. Successors and Assignments**

- i. Both City and Consultant bind themselves and any partner, successor, executor, administrator, or assign to this Agreement.
- ii. Neither City nor Consultant shall assign or transfer their interest or obligation hereunder in this Agreement without the written consent of the other party. Except for subconsultants identified in Exhibit A, Consultant must seek and obtain City's written consent before subcontracting any other part of the work required of Consultant under this Agreement. Any assignment, transfer, or subcontract attempted in violation of this subparagraph shall

be void.

## **16. Records**

- i. Consultant shall retain all books, documents, papers, and records that are directly pertinent to this Agreement for at least three years after City makes final payment on this Agreement and all other pending matters are closed.
- ii. Consultant shall allow City (or any of its authorized representatives) to audit, examine, copy, take excerpts from or transcribe any books, documents, papers, or records that are subject to the foregoing retention requirement.

## **17. Breach of Agreement**

- i. Consultant shall remedy any breach of this Agreement within the shortest reasonable time after Consultant first has actual notice of the breach or City notifies Consultant of the breach, whichever is earlier. If Consultant fails to remedy a breach in accordance with this paragraph, City may terminate that part of the Agreement affected by the breach upon written notice to Consultant, may obtain substitute services in a reasonable manner, and may recover from Consultant the amount by which the price for those substitute services exceeds the price for the same services under this Agreement.
- ii. If the breach is material and Consultant fails to remedy the breach in accordance with this paragraph, City may declare Consultant in default and pursue any remedy available for a default.
- iii. Pending a decision to terminate all or part of this Agreement, City unilaterally may order Consultant to suspend all or part of the services under this Agreement. If City terminates all or part of the Agreement pursuant to this paragraph, Consultant shall be entitled to compensation only for services rendered prior to the date of termination, but not for any services rendered after City ordered suspension of those services. If City suspends certain services under this Agreement and later orders Consultant to resume those services, Consultant shall be entitled to reasonable damages actually incurred, if any, as a result of the suspension.
- iv. To recover amounts due under this paragraph, City may withhold from any amounts owed by City to Consultant, including but not limited to, amounts owed under this or any other Agreement between Consultant and City.

## **18. Mediation/ Trial without a jury**

Should any dispute arise between the parties to this Agreement concerning their respective obligations of either or the terms hereof, it is agreed that such dispute will be submitted to a mediator prior to any litigation and the parties hereby expressly agree that no claim or dispute arising under the terms of this Agreement shall be resolved other than first through mediation and only in the event said mediation efforts fail, through litigation. Any litigation arising under or as a result of this Agreement shall be tried to the court without a jury. Each party agrees to be responsible for payment of its own professional fees, including attorneys' fees in both mediation and litigation.

**19. Termination for Convenience**

The City may terminate all or part of this Agreement at any time for its own convenience by written notice to Consultant. Upon termination under this paragraph, Consultant shall be entitled to compensation for all services rendered prior to actual notice of the termination or the receipt of the City's written notice of termination, whichever is earlier, plus Consultant's reasonable costs actually incurred in closing out the Agreement. Consultant is not entitled to special or consequential damages upon termination, including lost profits.

**20. Intellectual Property**

The interest in any intellectual property, including but not limited to copyrights and patents of any type, arising from the performance of this Agreement shall vest in the City. Consultant shall execute any assignment or other documents necessary to effect this paragraph. Consultant may retain a nonexclusive right to use any intellectual property that is subject to this paragraph. Consultant shall transfer to the City any data or other tangible property generated by Consultant under this Agreement and necessary for the beneficial use of intellectual property covered by this paragraph.

**21. Payment for Labor or Material**

Consultant shall make payment promptly, as due, to all persons supplying to Consultant labor or material for the prosecution of the work provided for in this Agreement. (ORS 279B.220)

**22. Contributions to the Industrial Accident Fund**

Consultant shall pay all contributions or amounts due the Industrial Accident Fund from Consultant incurred in the performance of this Agreement and shall ensure that all subcontractors pay those amounts due from the subcontractors. (ORS 279B.220)

**23. Income Tax Withholding**

Consultant shall pay to the Oregon Department of Revenue all sums withheld from employees pursuant to ORS 316.167. (ORS279B.220)

**24. Payment of Claims by the City**

If Consultant fails, neglects, or refuses to make prompt payment of any claim for labor or services furnished to Consultant or a subcontractor by any person in connection with this Agreement as the claim becomes due, the City may pay the claim to the person furnishing the labor or services and charge the amount of the payment against funds due or to become due to Consultant pursuant to this Agreement. The City's payment of a claim under this Paragraph shall not relieve Consultant or Consultant's surety, if any, from responsibility for those claims.

**25. Hours of Labor**

Consultant shall pay employees for overtime work performed under the terms of this Agreement in accordance with ORS 653.010 to ORS 653.261 and the Fair labor standards Act of 1938. (29 USC §§ 201 *et. seq.*)

**26. Workers' Compensation**

Consultant is a subject employer that will comply with ORS 656.017. Consultant warrants that all persons engaged in contract work and subject to the Oregon Workers' Compensation law are covered by a workers' compensation plan or insurance policy that fully complies with Oregon law. Consultant shall indemnify City for any liability incurred by City as a result of Consultant's breach of the warranty under this Paragraph. (ORS 279B.230)

**27. Medical Care for Employees**

Consultant shall make payment of all sums to any person, co-partnership, association or corporation, furnishing medical, surgical and/or hospital care incident to the sickness or injury of Consultant's employee(s), all sums which Consultant agrees to pay for such services and all monies and sums which Consultant collected or deducted from the wages of employees pursuant to any law or contract for the purpose of providing or paying for such service. (ORS 279B.230)

**28. Modification**

Any modification of the provisions of this Agreement shall be reduced to writing and signed by authorized agents of City and Consultant.

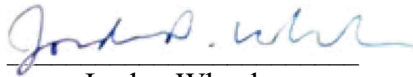
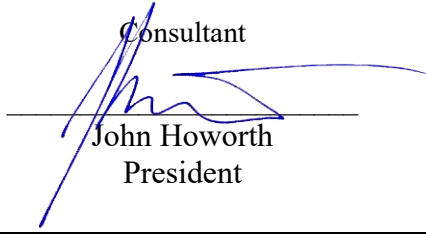
**29. No Waiver of Legal Rights**

A waiver by a party of any breach by the other shall not be deemed to be a waiver of any subsequent breach.

**30. Integration**

This Agreement contains the entire agreement between City and Consultant and supersedes all prior written or oral discussions or agreements regarding the same subject.

**[SIGNATURES ON FOLLOWING PAGE]**

<p>City of Sandy, Oregon</p>  <hr/> <p>Jordan Wheeler City Manager</p>	<p>Consultant</p>  <hr/> <p>John Howorth President</p>
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# SANDY 2043 VISION AND COMPREHENSIVE PLAN FINAL SCOPE OF WORK *November 24, 2021*

## **TASK 1. PROJECT MANAGEMENT**

### **Task 1.1 Project Kickoff**

Prepare for and participate in a kickoff meeting with Sandy staff to review, refine and finalize the scope of work, deliverables, schedule and budget, and agree on roles and responsibilities, and communication protocols. Agree on a preliminary list of key stakeholder groups and discuss public engagement and communications tools and strategies.

*Deliverables: Kickoff meeting agenda and notes; refined scope of work, schedule, budget, roles and responsibilities  
Timeline: December 2021*

### **Task 1.2 Project Administration**

Hold bi-weekly project management phone calls to track progress on key tasks and deadlines, discuss roles, identify unanticipated issues and develop alternative approaches as needed. Prepare monthly progress reports and invoices that describe the activities undertaken, estimate the percent completion of each task, and track expenditures and hours.

*Deliverables: Bi-weekly call agendas and notes; monthly progress reports, invoices  
Timeline: Ongoing*

## **TASK 2. EXISTING CONDITIONS ASSESSMENT**

### **2.1 Data Collection and Analysis**

Research comprehensive plan elements through the review of relevant documents, such as the existing adopted Comprehensive Plan, newly updated Transportation System Plan (TSP) and 2015 Urbanization Study, among others. Collect and synthesize existing data from the 2015 Urbanization Study, with a focus on updating data points (since 2015) for the following key indicators:

- Sociodemographic data
- Housing costs
- Building permit data
- Population growth forecasts
- Land consumption rates
- Sectors of employment

Information collected through the City's concurrent Economic Opportunities Analysis (EOA) process will also be incorporated into the review and synthesis of the economic elements of the 2015 Urbanization Study.

In addition, data will be collected and analyzed around Sandy's vulnerability to natural hazards. Exposure to natural hazards will be assessed through a review of historical trends, as well as projected future changes, based on the best available scientific information, model outputs, and existing research related to natural hazard impacts for the area. Work with the City of Sandy to determine the key variables that will be important to consider as well as the level of risk the City plans to address.

Information from the synthesis of relevant background documents as well as analysis of demographics, land use, economic and housing trends, transportation, natural resources and natural hazard vulnerability, will be used to develop background reports that align with statewide planning goals. The reports will describe the comprehensive plan elements and underlying topics as they relate to the City of Sandy: What are the City's assets? What trends are driving how the topic has changed and will continue to change the community? Examples of topics include:



- Housing
- Natural Hazards and Resiliency
- Community and Culture
- Transportation and Infrastructure
- Governance and Growth Management
- Parks, Trails and Natural Resources

The Background Reports will be presented in non-scientific language and accessible to a wide audience. The Background Reports will use a combination of narrative, maps, tables and graphics to convey key information and ultimately constitute as the introduction to each chapter in the updated Comprehensive Plan document. A two-page, infographic-rich “Community Profile” will also be developed to make the information more accessible to the public. This information will be used at outreach events and distributed widely through various online and City mechanisms.

**Deliverables:** *Background Reports, Community Profile*

**Timeline:** *December-March 2022*

### **2.3 Housing Snapshot**

To expand upon the data-driven assessment of housing trends in the Background Reports and develop a more qualitative understanding housing perspectives in Sandy, in-depth interviews will be conducted with community members from varying socioeconomic backgrounds to share stories of housing experiences in Sandy with regards to access, choice and/or affordability.

Support City staff in identifying interviewees, developing questions and conducting up to (5) interviews in a shared effort with staff. Prepare a graphically rich document that showcases the collection of (5) community stories and describes housing experiences and perspectives in Sandy. A presentation deck will be prepared that describes the interviews, reflects on the process and provides key takeaways.

**Deliverables:** *Conduct up to (5) community interviews; Draft, and Final Housing Snapshot; Presentation materials*

**Timeline:** *December 2021-March 2022*

### **2.3 SWOT Analysis**

Based on the information provided in the Background Reports, design a matrix that analyzes Sandy’s strengths, weaknesses, opportunities and threats within the framework of community resilience. Populate the matrix with a preliminary assessment, in coordination with the Project Team, and present it for discussion among the project’s committees as a first activity following introduction to the process. Use the SWOT analysis to frame the Comprehensive Plan Visioning process, develop resilience policies, and generate engagement around Sandy’s future.

**Deliverables:** *SWOT Analysis Matrix*

**Timeline:** *February-March 2022*

## **TASK 3. ECONOMIC OPPORTUNITIES ANALYSIS**

### **3.1 Economic Opportunities Analysis (EOA)**

Developing EOA will include the following steps:

- **Buildable Lands Inventory (BLI).** The BLI will result in an accurate inventory of commercial and industrial land that is vacant, underutilized, or redevelopable. The consultant will help define key parcel characteristics that make land suitable or not suitable for commercial or industrial development or redevelopment. These characteristics will be used in part to help qualify parcels for inclusion in the inventory. The inventory will also identify and exclude parcels affected by natural and manmade constraints that would prohibit their feasible use for development.

This task will result in an inventory of buildable lands designated for employment (commercial and industrial) within the Sandy UGB. The inventory will meet the requirements of Goal 9, which essentially takes a “site” based approach to land inventories. The BLI must identify sites by plan designation; the EOA must identify “needed sites” based on the regional economic development goals and objectives. The product of the BLI will be: (1) maps and GIS data and (2) a chapter of the EOA that describes the methodology and results of the BLI.

- **Economic Opportunities Analysis.** The EOA will develop the analysis of employment growth potential and demand for the economic opportunities analysis. The demand analysis should document key economic opportunities and estimate the future demand for commercial and industrial development in Sandy. The analysis will address relationships among demographics, employment growth, market trends, and development. Population growth, demographic shifts, and employment growth by sector will drive demand for future development. Forecasting employment land demand will require completing the following tasks:
  - Review of national, state, and local trends
  - Assessment of community economic development potential
  - Forecast of employment growth in Sandy
  - Identification of required site types

A primary objective of many EOAs is to develop technical analysis that supports a meaningful assessment of policies and actions to identify economic development opportunities in the city. In addition, the city expects to have meetings with the Economic Development Advisory Board. The anticipated purpose and outcome of each Economic Development Advisory Board meetings will be as follows:

- Meeting 1: Preliminary results of the BLI and discuss economic development objectives
- Meeting 2: Preliminary results of the EOA and employment growth forecast and revised BLI results (if needed)
- Meeting 3: Site needs of target industries, site suitability of existing buildable land, and preliminary assessment of land sufficiency
- Meeting 4: Results of site-specific analysis and consideration of economic development policy revisions for the Comprehensive Plan
- Meeting 5: Final EOA and final revisions to Comprehensive Plan policies

We will present findings of the EOA to the Planning Commission and City Council at one of the project briefings for the project.

***Deliverables:*** Draft and final EOA report; Revisions to Comprehensive Plan policies

***Timeline:*** January-December 2022

## **TASK 4. COMMUNITY ENGAGEMENT**

### **4.1 Public Engagement Strategy**

Prepare a Public Engagement Strategy to guide outreach efforts throughout the vision and comprehensive plan process and encourage community-wide participation by providing many opportunities for public exchange in a variety of formats and locations. The Strategy 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. The Public Engagement Strategy will provide an approach for engaging Sandy youth, either through activities that support the project and/or a Youth Advisory Committee. The Strategy also will identify methods of communication to keep community members up-to-date with the project, and notify residents, businesses and other stakeholders about opportunities to be actively involved in the Comprehensive Plan update process.

***Deliverables:*** Draft and Final Public Engagement Strategy

***Timeline:*** January 2022

## 4.2 Advisory Committees and Commissions

### *Community Advisory Committee*

Facilitate up to eight (8) meetings of a Community Advisory Committee (CAC) that represents a broad cross-section of community interests. The CAC will review and comment on work products, guide public outreach and engagement efforts, act as liaisons to specific constituencies or interest groups, help host public events, encourage community members to participate in the process, and act as champions of the ultimate Sandy Vision and Comprehensive Plan that emerges from this process. Develop a CAC charter that establishes roles, shared ground rules and decision-making procedures. The anticipated purpose and outcome of each CAC meetings will be as follows:

CAC #1: *Learn about the Comprehensive Plan process, Discuss key issues, and Review draft Public Involvement Plan elements*

CAC #2: *Review Background Reports and Community Profile, Provide guidance on readability/accessibility, Engage in SWOT Analysis, Report back on visioning activities*

CAC #3: *Engage in SWOT Analysis (cont'd), Report back on visioning activities, Identify Vision Themes*

CAC #4: *Review community feedback from visioning activities, Review Draft Vision Statement*

CAC #5: *Review community feedback from Open House #1, Finalize Vision Statement, Review Draft Goals*

CAC #6: *Develop policy concepts for first group of Comp Plan chapters*

CAC #7: *Develop policy concepts for second group of Comp Plan chapters*

CAC #8: *Develop policy concepts for third group of Comp Plan chapters*

### *Youth Advisory Committee*

Facilitate up to two (2) meetings of a Youth Advisory Committee (YAC) consisting of Sandy High School students. Support City staff to engage the YAC in community outreach efforts and provide youth-specific guidance on the Comprehensive Plan update.

*Depending on the availability of additional funds and both student and City interest and capacity, we can facilitate 2-3 more YAC meetings or provide training in outreach and community organization. This could include activities like intercept surveys, report-writing and school-based community conversations as well as a small stipend for students.*

### *Planning Commission and City Council Briefings*

Support City staff in providing up to eight (8) Planning Commission and City Council briefings at key points throughout the project. These briefings are important touchpoints to ensure elected and appointed officials are engaged in the process and eventual recommendations are supported.

*Depending on availability of additional funds, 3J also will support City staff in engaging other pertinent committees identified by the City. Other committees may include a Business Advisory Committee and Environmental Advisory Committee, or the formation of a Technical Committee that consist of stakeholders, agency partners and service providers such as ODOT, DLCD, DEQ, and Clackamas County to work alongside the CAC, review project materials and advise on technical issues. Depending on the makeup of the CAC, a technical committee or task force may be needed for the natural hazard mitigation and resiliency process.*

**Deliverables:** *Prepare for and facilitate up to eight (8) CAC meetings with meeting summaries, two (2) YAC meetings and eight (8) Planning Commission and City Council Briefings*

**Timeline:** *Ongoing*

## 4.3 Community Conversations and Events

Prepare a Community Conversation Kit and conduct up to two (2) Community Conversations in a shared effort with City staff and CAC members. Community Conversation Kits will be structured in a manner that provides community members with information about the project and engages them in discussion about what they value about Sandy today and what could make it a better place to live in the future.

In addition to community conversations, support City staff to identify and design activities for community events, like an informational booth or intercept surveys. Community Events may include Music and Movies in the Park, Farmers' Market, Longest Day Parkway, Corn Cross Cyclecross Race, Dog Days Out, Christmas Tree Lighting Ceremony, Trick-or-Treat Trail, Music Fair and Feast, the Sandy Mountain Festival, and SOLV-IT in Sandy Day and others. Activities will be designed to create awareness of the project and engage youth and adults in identifying what they love about Sandy today and what they would change to make Sandy an even better place to live, work and play in the future. City staff and CAC members will be the primary staff at these events.

**Deliverables:** *Community Conversations Kit, Summaries of up to two (2) Community Conversations, Community Event materials*

**Timeline:** *January 2022*

#### **4.4 Stakeholder Workshops**

Lead and facilitate two (2) day-long stakeholder workshops will be held to identify natural hazard vulnerabilities and develop policies to address those vulnerabilities in the comprehensive plan. Workshop #1 will coincide with the visioning process and convene City staff, CAC members, and technical experts from the following community systems: economic, built, health and human services, natural resources, and cultural. Those participants will review environmental projections and identify the impact those changing conditions will have on the five community systems. This vulnerability assessment will form the foundation for Workshop #2 where the same participants will identify policy solutions to address the highest priority natural hazard vulnerabilities as part of the development of the Comprehensive Plan.

**Deliverables:** *Prepare, facilitate, and summarize two (2) Stakeholder Workshops*

**Timeline:** *June 2022 and October 2022*

#### **4.5 Surveys and Online Engagement**

Develop up to four (4) online community forums or surveys to gather the general interests and positions of the public throughout the Visioning and Comprehensive Planning process. Digital surveys will be provided through EngagementHQ or other online engagement platforms, and paper surveys may be distributed or conducted as intercept surveys at strategic locations around the city, such as the library, Ant Farm, senior center and similar "third place" locations. The data from these surveys will be aggregated and used to inform the development of the Sandy 2043 Vision, as well as various elements in the Comprehensive Plan. Surveys will coincide with each of the (4) rounds of public involvement and provide an alternative opportunity to comment for those who may not come to a meeting or event or feel comfortable voicing their opinions among others. These engagement opportunities will be advertised in Sandy community Facebook groups, City communication channels, and in-person in aforementioned "third places."

**Deliverables:** *Develop and summarize up to four (4) online community forums or surveys*

**Timeline:** *Ongoing*

#### **4.6 Open Houses**

Work with City staff and the CAC to host four (4) Open Houses throughout the course of the project, pending COVID-19 protocols. These fun and engaging community events are the main opportunities for Sandy community members to engage and share ideas with their neighbors face-to-face regarding the Sandy 2043 Vision and various elements of the Comprehensive Plan. Open Houses may include a variety of activities, such as multiple stations around a room, breakout discussion groups and/or real-time polling, and offer Spanish translation services. Additionally, staff and officials will be available to answer questions and discuss ideas with participants. In order to encourage participation, snacks/beverages and activities for children will be provided.

Open House #1: *Community members will review and comment on the draft Vision Statement and participate in discussions to identify preliminary goals for each topic area.*

Open House #2: *Validate draft goals for the first group of Comp Plan Chapters and share ideas that can best serve the community's vision*

Open House #3: *Validate draft goals for the second group of Comp Plan Chapters and share ideas that can best serve the community's vision*

Open House #4: *Validate draft goals for the third group of Comp Plan Chapters and share ideas that can best serve the community's vision*

**Deliverables:** *Prepare for and facilitate up to four (4) Open Houses, summarize engagement results*

**Timeline:** *Ongoing*

#### **4.7 Communication Tools**

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

- **Branding.** Use the City's project branding on all materials, ensuring continuity and visibility for the Vision and Comprehensive Plan process.
- **Project Website.** Support City staff's efforts to design and administer an informative, accessible and interactive website. Provide content for the project hub, which staff will run and maintain, including a project overview and timeline, important contacts, schedules for public events, opportunities for participation, updates on the project's status, and the ability to view or download documents.
- **Social media.** Provide City staff with content for their social media platforms, such as the City's Facebook and Twitter accounts to increase project awareness and provide multiple avenues for community input.
- **Media contacts.** Prepare media releases to the Sandy Source and other local outlets for the City to distribute.
- **Public information materials.** 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. 3J 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:** *Outreach and communications materials*

**Timeline:** *Ongoing*

### **TASK 5. VISIONING AND GOAL SETTING**

#### 5.1 Sandy 2043 Vision and Goals

Concurrent with the collection and analysis of background information and identification of natural hazard vulnerabilities through Stakeholder Workshop #1, the first round of outreach activities will focus on the Sandy 2043 Vision. The community will be asked open-ended questions about what they like about Sandy today and what could be improved in the future. Natural hazard vulnerabilities will be identified by processing the information from the first stakeholder workshop. Compile the input gathered and summarize the major themes and categories of ideas. Organize the information into Comprehensive Plan "topic areas" that build upon the organization of the Background Reports and are further refined to reflect community priorities. This information will be the foundation of the Comprehensive Plan vision statement and goals. Depending on staff direction, the plan elements of the Comprehensive Plan will either be organized by the topic areas of the Vision Statement or by statewide planning goal.

**Deliverables:** *Draft and Final Sandy 2043 Vision and Goals, prioritized list of natural hazard vulnerabilities*

**Timeline:** *August 2022*

### **TASK 6. COMPREHENSIVE PLAN**

#### 6.1 Policy Formulation and Implementation Strategies

City staff and the consultant team will coordinate lead and support roles in the development of updated policies for each of the comprehensive plan elements which will be integrated into the updated Comprehensive Plan either

as its own element or spread across other elements. This will require close and direct coordination with City staff, CAC members and other stakeholders that represent various capacities related to the comprehensive plan elements.

Policies developed will be analyzed to ensure alignment with the SWOT analysis prior to being included in the Comprehensive Plan. This ensures planning efforts and recommendations from supporting community plans are coordinated and reflected in the updated Comprehensive Plan.

City staff and the consultant team will work collaboratively to identify any implementation strategies and evaluate a selection of implementation strategy options, where applicable.

*If additional funding becomes available, other tasks may include a formal action plan, an implementation strategy for HB 2003, code updates, zoning map updates, and other implementing ordinances.*

***Deliverables:*** Draft Policies, Implementation Strategy, Policy Evaluation Matrix

***Timeline:*** September 2022 – February 2023

## 6.2 Comprehensive Plan

Produce a Comprehensive Plan document that incorporates the Background Reports and natural hazards vulnerability assessment, as well as the vision, goals and policies for each topic area or statewide planning goal, ensuring that the policies are aligned with Oregon Statewide Planning goals and have supporting implementation strategies where applicable. By the time of production, all contents of the document will have been vetted and reviewed by the CAC and broader community.

The Comprehensive Plan document will be shared with City staff in Word so that staff may design and format the document in Adobe InDesign.

***Deliverables:*** Draft and Revised Comprehensive Plan document

***Timeline:*** March-April 2023

## **TASK 7. ADOPTION**

Support City staff in adoption proceedings by presenting the draft Comprehensive Plan in 3 groupings of chapters to be reviewed at a series of joint Planning Commission and City Council worksessions. 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.

***Deliverables:*** Presentations at up to three (3) Joint Planning Commission/City Council work sessions, one (1) Planning Commission hearing, one (1) City Council hearing

***Timeline:*** May – August 2023

## Project Schedule

Task	2021	2022											2023										
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	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 Assessment																							
2.1 Data Collection and Analysis																							
2.2 Housing Snapshot																							
2.3 SWOT Analysis				▲																			
3 Economic Opportunities Analysis																							
3.1 Economic Opportunities Analysis (EOA)					●		●		●														
4 Community Engagement																							
5 Visioning and Goal Setting																							
5.1 Sandy 2045 Vision and Goals					●	●	★	★	●														
6 Comprehensive Plan																							
6.1 Policy Formulation and Implementation Strategies										●	★	●	★	●	★								
6.2 Comprehensive Plan Development										▲	★	▲	▲	▲	▲								
7 Adoption																				▲	▲	▲	▲

- Team Kickoff
- CAC and Advisory Board Meetings (11)
- ▲ PC/CC Briefings (8)
- ★ Open Houses (4)
- ★ Stakeholder Workshops (2)

<b>Sandy Comprehensive Plan Cost Estimate Summary</b>	<b>3J</b>	<b>GEOS</b>	<b>Veritas</b>	<b>ECONW</b>	<b>TOTAL</b>
<b>Tasks</b>	<b>Subtotal</b>	<b>Subtotal</b>	<b>Subtotal</b>	<b>Subtotal</b>	
<b>1. Project Management</b>	<b>\$21,260</b>	<b>\$5,980</b>	<b>\$2,970</b>	<b>\$2,880</b>	<b>\$ 33,090</b>
1.1 Project Kickoff	\$1,252	\$260	\$330	\$320	\$ 2,162
1.2 Project Administration	\$20,008	\$5,720	\$2,640	\$2,560	\$ 30,928
<b>2. Existing Conditions Assessment</b>	<b>\$11,344</b>	<b>\$8,810</b>	<b>\$0</b>	<b>\$7,700</b>	<b>\$ 27,854</b>
2.1 Data Collection and Analysis	\$6,672	\$7,250	\$0	\$5,780	\$ 19,702
2.2 Housing Snapshot	\$3,136	\$0	\$0	\$0	\$ 3,136
2.3 SWOT Analysis	\$1,536	\$1,560	\$0	\$1,920	\$ 5,016
<b>3. Economic Opportunities Analysis</b>	<b>\$1,024</b>	<b>\$0</b>	<b>\$0</b>	<b>\$40,000</b>	<b>\$ 41,024</b>
3.1 Economic Opportunity Analysis	\$1,024	\$0	\$0	\$40,000	\$ 41,024
<b>4. Community Engagement</b>	<b>\$50,638</b>	<b>\$21,830</b>	<b>\$17,030</b>	<b>\$4,240</b>	<b>\$ 93,738</b>
Task 4.1 Public Engagement Strategy	\$3,244	\$1,040	\$1,320	\$0	\$ 5,604
Task 4.2 Advisory Committees (10) and Commission Briefings (8)	\$19,636	\$4,030	\$0	\$2,560	\$ 26,226
Task 4.3 Community Events and Conversations	\$3,936	\$0	\$2,970	\$0	\$ 6,906
Task 4.4 Stakeholder Workshops	\$2,048	\$11,120	\$0	\$0	\$ 13,168
Task 4.5 Surveys and Online Engagement (4 surveys)	\$5,248	\$1,560	\$5,810	\$0	\$ 12,618
Task 4.6 Open Houses (4 open houses)	\$8,346	\$4,080	\$1,320	\$1,680	\$ 15,426
Task 4.7 Communication Materials	\$8,180	\$0	\$5,610	\$0	\$ 13,790
<b>5. Visioning and Goal Setting</b>	<b>\$8,368</b>	<b>\$3,120</b>	<b>\$0</b>	<b>\$0</b>	<b>\$ 11,488</b>
Task 5.1 Sandy 2043 Vision and Goals	\$8,368	\$3,120	\$0	\$0	\$ 11,488
<b>6. Comprehensive Plan</b>	<b>\$13,016</b>	<b>\$13,820</b>	<b>\$0</b>	<b>\$7,080</b>	<b>\$ 33,916</b>
Task 6.1 Policy Formulation and Implementation Strategies	\$9,856	\$12,260	\$0	\$7,080	\$ 29,196
Task 6.2 Comprehensive Plan	\$3,160	\$1,560	\$0	\$0	\$ 4,720
<b>7. Adoption (5)</b>	<b>\$5,370</b>	<b>\$1,820</b>	<b>\$0</b>	<b>\$2,660</b>	<b>\$ 9,850</b>
<b>Total Hours</b>	<b>910</b>	<b>434</b>	<b>122</b>	<b>433</b>	<b>-----</b>
<b>Total Fees</b>	<b>\$111,020</b>	<b>\$55,380</b>	<b>\$20,000</b>	<b>\$64,560</b>	<b>\$ 250,960</b>