



## BOARD OF COMMISSIONERS

### BOARD OF COUNTY COMMISSIONERS MEETING

9:00 AM, WEDNESDAY, MARCH 27, 2024

Barnes Sawyer Rooms and Allen Room - Deschutes Services Building - 1300 NW Wall Street – Bend  
(541) 388-6570 | [www.deschutes.org](http://www.deschutes.org)

### AGENDA

**MEETING FORMAT:** In accordance with Oregon state law, this meeting is open to the public and can be accessed and attended in person or remotely, with the exception of any executive session.

Members of the public may view the meeting in real time via YouTube using this link: <http://bit.ly/3mmlnzy>. **To attend the meeting virtually via Zoom, see below.**

**Citizen Input:** The public may comment on any topic that is not on the current agenda. Alternatively, comments may be submitted on any topic at any time by emailing [citizeninput@deschutes.org](mailto:citizeninput@deschutes.org) or leaving a voice message at 541-385-1734.

When in-person comment from the public is allowed at the meeting, public comment will also be allowed via computer, phone or other virtual means.

**Zoom Meeting Information:** This meeting may be accessed via Zoom using a phone or computer.

- To join the meeting via Zoom from a computer, use this link: <http://bit.ly/3h3oqdD>.
- To join by phone, call 253-215-8782 and enter webinar ID # 899 4635 9970 followed by the passcode 013510.
- If joining by a browser, use the raise hand icon to indicate you would like to provide public comment, if and when allowed. If using a phone, press \*9 to indicate you would like to speak and \*6 to unmute yourself when you are called on.
- When it is your turn to provide testimony, you will be promoted from an attendee to a panelist. You may experience a brief pause as your meeting status changes. Once you have joined as a panelist, you will be able to turn on your camera, if you would like to.



Deschutes County encourages persons with disabilities to participate in all programs and activities. This event/location is accessible to people with disabilities. If you need accommodations to make participation possible, call (541) 388-6572 or email [brenda.fritsvold@deschutes.org](mailto:brenda.fritsvold@deschutes.org).

**Time estimates:** The times listed on agenda items are estimates only. Generally, items will be heard in sequential order and items, including public hearings, may be heard before or after their listed times.

## CALL TO ORDER

## PLEDGE OF ALLEGIANCE

**CITIZEN INPUT:** Citizen Input may be provided as comment on any topic that is not on the agenda.

**Note:** In addition to the option of providing in-person comments at the meeting, citizen input comments may be emailed to [citizeninput@deschutes.org](mailto:citizeninput@deschutes.org) or you may leave a brief voicemail at 541.385.1734.

## CONSENT AGENDA

1. Approval of minutes of the BOCC January 30, 2024 annual retreat
2. Approval of minutes of the BOCC February 21, 26 and 28, 2024 meetings

## ACTION ITEMS

- [3.](#) **9:10 AM** Proclamation: International Dark Sky Week
- [4.](#) **9:20 AM** Multiple Unit Property Tax Exemption application for Timber Yards Parcel A development at 175 SW Industrial Way
- [5.](#) **9:30 AM** Planning Commissioner Appointment and Reappointment
- [6.](#) **9:45 AM** COHC Engaging Communities and Schools in Substance Misuse and Overdose Prevention Grant Application
- [7.](#) **10:05 AM** Acceptance of two Central Oregon Health Council Behavioral Health Surplus Funds Grants
- [8.](#) **10:15 AM** Deliberations: Draft 2020-2040 Tumalo Community Plan Update
- [9.](#) **10:40 AM** Treasury Report for February 2024
- [10.](#) **10:55 AM** Finance Report for February 2024
- [11.](#) **11:10 AM** Work Session: RVs as Rental Dwellings Text Amendments

## LUNCH RECESS

*Following the recess, the meeting will reconvene in the Allen Room on the second floor of the Deschutes Services Building.*

## **EXECUTIVE SESSION**

*At any time during the meeting, an executive session could be called to address issues relating to ORS 192.660(2)(e), real property negotiations; ORS 192.660(2)(h), litigation; ORS 192.660(2)(d), labor negotiations; ORS 192.660(2)(b), personnel issues; or other executive session categories.*

*Executive sessions are closed to the public; however, with few exceptions and under specific guidelines, are open to the media.*

12. **1:00 PM** Executive Session under ORS 192.660 (2) (h) Litigation

## **Continued ACTION ITEMS**

- [13.](#) **1:30 PM** End of Legislative Session Review from Northwest Policy Advocates

## **OTHER ITEMS**

*These can be any items not included on the agenda that the Commissioners wish to discuss as part of the meeting, pursuant to ORS 192.640.*

## **ADJOURN**



BOARD OF  
COMMISSIONERS

# AGENDA REQUEST & STAFF REPORT

**MEETING DATE:** March 27, 2024

**SUBJECT:** Proclamation: International Dark Sky Week

**RECOMMENDED MOTION:**

Move approval of the proclamation declaring April 2 – 8, 2024, as International Dark Sky Week in Deschutes County.

**BACKGROUND AND POLICY IMPLICATIONS:**

Dark sky areas provide opportunities for stargazing, astrophotography and other nighttime activities that require clear skies and minimal intrusion from artificial lighting. This proclamation celebrates Dark Sky Week in recognition of the benefits of dark sky areas.

**BUDGET IMPACTS:**

None

**ATTENDANCE:**

Carter Gudell, Visit Central Oregon Regional Programs Specialist



For Recording Stamp Only

BEFORE THE BOARD OF COMMISSIONERS OF DESCHUTES COUNTY, OREGON

**PROCLAMATION**

**Whereas**, the experience of looking up at a starry night sky inspires feelings of wonder and awe; and

**Whereas**, dark skies are an integral aspect of the sustainability of Oregon’s wild ecosystems as a key environmental factor in bird migration, insect pollination, and healthy human sleep patterns; and

**Whereas**, Oregon’s dark skies are a significant natural resource, with three accredited Dark Sky Places to date—Sunriver, Prineville Reservoir State Park, and the newly certified Oregon Outback International Dark Sky Sanctuary; and

**Whereas**, the largest area of pristine night skies in the contiguous 48 states is located right here in Oregon; and

**Whereas**, astro-tourism—including star gazing, astronomy star parties, and dark sky photography—is a growing facet of outdoor recreation with real economic benefits for communities across Oregon, and amplifies the importance of preventing and mitigating light pollution to preserve the beauty of our nighttime environment; and

**Whereas**, International Dark Sky Week is observed each April during the week of the new moon;

**Now, therefore**, the Deschutes County Board of Commissioners hereby proclaims the week of April 2 – 8, 2024 to be

***“International Dark Sky Week”***

in Deschutes County, and encourages stewardship of our shared natural wonders and magnificent dark skies.

Dated this \_\_\_\_ day of \_\_\_\_\_ 2024 by the Deschutes County Board of Commissioners.

\_\_\_\_\_  
Patti Adair, Chair

\_\_\_\_\_  
Anthony DeBone, Vice Chair

ATTEST:

\_\_\_\_\_  
Recording Secretary

\_\_\_\_\_  
Phil Chang, Commissioner



BOARD OF COMMISSIONERS

AGENDA REQUEST & STAFF REPORT

MEETING DATE: March 27, 2024

SUBJECT: Multiple Unit Property Tax Exemption application for Timber Yards Parcel A development at 175 SW Industrial Way

RECOMMENDED MOTION:

Consider the application from KW Kelton-Bend Owner, LLC for a Multiple Unit Property Tax Exemption relating to property at 175 SW Industrial Way in Bend.

BACKGROUND AND POLICY IMPLICATIONS:

In August 2022, the Bend City Council adopted a Multiple Unit Property Tax Exemption (MUPTE) program to support development and redevelopment goals in Bend’s core and transit-oriented areas. The program is available for multi-story residential projects in certain areas of Bend that provide three or more units and provide at least three defined public benefits.

The Timber Yards Parcel A project proposes a six-story 246 unit mixed use building with 15,973 square feet of commercial space to be located on the northwest corner of the approved Timber Yards Master Plan area within the Core Area TIF Area. For this project, the three identified public benefits would be:

- Open Space: 13,343 square feet (11% of site area) of contiguous open space;
- Enhanced Landscaping: with an emphasis on native, pollinator-friendly and water-wise plants; and
- Wrapped Parking Structure: offering 254 structured vehicle parking spaces with retail and residential uses to be located on the street level frontage.

According to information submitted by the applicant and reviewed by an independent financial consultant, this project approaches financial feasibility only with a MUPTE award, and can still be viewed as a financially challenged project even with the lowered property tax burden.

In order for this project to qualify for the tax exemption, it must be approved by the boards which represent at least 51% of the combined levy of taxing districts. **As this MUPTE application was approved by the Bend City Council on March 20<sup>th</sup>, this project has already received approval from 51% of the taxing districts since the**

**Bend-LaPine School District adopted a resolution on January 9, 2024 approving the policy of MUPTE inside the Core Area TIF Area through June 30, 2025.**

More information is available online at:

[Multiple Unit Property Tax Exemption Program | City of Bend \(bendoregon.gov\)](https://www.bendoregon.gov/mupte)

**BUDGET IMPACTS:**

If approved, this exemption would only affect the Bend Urban Renewal Agency's Core Area Tax Increment Finance (TIF) Fund and thus would not result in direct budget impacts to any of Deschutes County's taxing districts.

**ATTENDANCE:**

Nick Lelack, County Administrator





# COMMUNITY DEVELOPMENT

## STAFF REPORT FOR MULTIPLE UNIT PROPERTY TAX EXEMPTION

**PROJECT NUMBER:** PRTX202307350

**COUNCIL DECISION:** March 20, 2024

**APPLICANT/ OWNER:** Kennedy Wilson  
151 S El Camino Dr  
Beverly Hills, CA 90212

**OWNER:** KW Kelton-Bend Owner LLC

**APPLICANT'S REPRESENTATIVE:** Joey Shear, AKS Engineering & Forestry  
2777 NW Lolo Drive, Suite 150  
Bend, OR 97703

**LOCATION:** 175 SW Industrial Way (Tax Lot 181205A000500)  
Located east of SW Bond Street, west of US 97, and south of Industrial Way

**REQUEST:** Multiple Unit Property Tax Exemption (MUPTEx), 10-year tax exemption on residential improvements

**STAFF REVIEWER:** Allison Platt, Economic Development

**RECOMMENDATION:** Approval

**DATE:** February 1, 2024 (revised February 27, 2024)

### PROJECT & SITE OVERVIEW

The Timber Yards Parcel A project is a proposed six-story mixed-use building to be located on the northwest corner of the approved Timber Yards Master Plan area located east of SW Bond Street, west of US 97, and south of Industrial Way. The location of the proposed project is in the Mixed-Use Urban (MU) Zone inside the Core Tax Increment Finance (TIF) Area. The project proposes 246 residential units, 15,973 square feet of commercial space (47% of the ground floor, excluding parking) for future retail and/or restaurant, and 13,343 square feet (11% of site area) of contiguous dedicated open space. The project will include 254 structured vehicle parking spaces provided in a wrapped parking structure. As required by the building code, 40% of these spaces (102 spaces) will be provided as "EV ready". As required by the development code, the project will include 246 secured residential bike parking spaces and 8 additional spaces for retail customers and employees. In addition, the project will include professionally

designed landscaping that emphasizes native, pollinator-friendly and water wise species and design.

**Public Benefits**

The project plans to incorporate the following three public benefits to meet the requirements of the MUPTE program:

**Priority Public Benefit:**

- Open Space: Plan to dedicate 13,343 sq. Ft (11% of site area) as contiguous open space in a public access easement.

**Additional Public Benefits:**

- Enhanced Landscaping: The project will include professionally designed landscaping that emphasizes native, pollinator friendly and water wise species and design.
- Wrapped Parking Structure: 254 structured vehicle parking spaces provided in a wrapped parking structure in which retail and/or residential uses will be included on the street level for any frontages on roads with a higher classification than an alley.

The developer plans to provide several other public benefits, beyond the requirements for MUPTE, including:

- 15,973 square feet of commercial space (48.7% of ground floor space)
- The open space area included in Tract A further south of this application will include a mobility hub per the Timber Yards Master Plan requirements which will provide additional public benefit with enhanced access to transit and micromobility services to the site.

The owner received tentative land division approval (PLLD20230464) and for site plan review approval (PLSPR20230465) on January 16, 2024.

VICINITY MAP

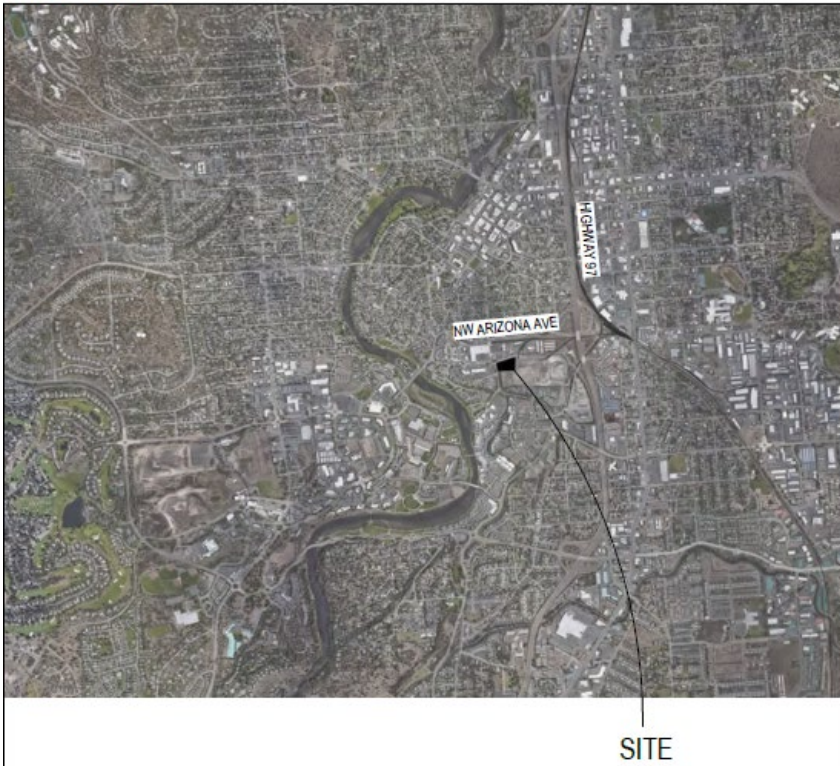


Figure 1: Site Location



Figure 2: Site Location (Parcel A) within approved Master Plan



SE Axon Looking Northwest Along Timber Yards Drive

**Figure 3: Conceptual project rendering**

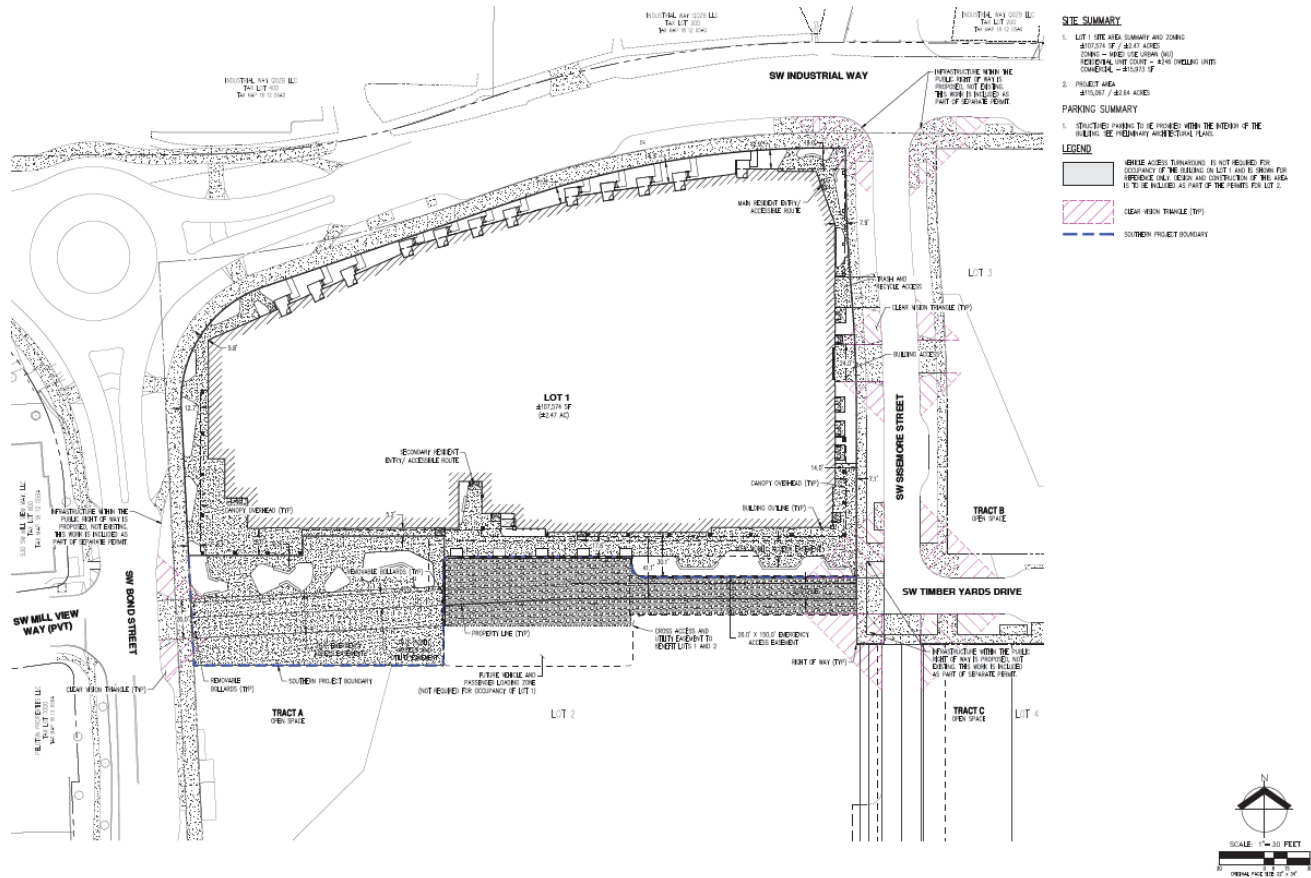


Figure 4: Site Plan

**INFRASTRUCTURE NEEDED TO SERVE THE SITE**

The project will be required to provide the following mitigations to support development of the Parcel A site as confirmed in a letter from the City of Bend Private Development Engineering Department.

- 1) Construction of water main to service the new uses, looping the existing water system mains within and along the site permitted to achieve fire flow
- 2) Construction of a sewer lift station and sewer force main with all applicable gravity sewer main to service each proposed use.
- 3) A variety of transportation mitigation requirements approved in the Master Plan as described in Bend Development Code Table 2.7.4770.

These mitigation improvements are outlined under the utility analysis PRSWA202206668 and required in the land division approval PLLD20230464.

**ELIGIBILITY CRITERIA**

**APPLICATION OF THE CRITERIA**

**LOCATION/ELIGIBLE ZONE REQUIREMENTS**

The project site is located in the Mixed-Use Urban (MU) Zone inside the Core Tax Increment Finance (TIF) Area which is eligible for the MUPTE program per BMC 12.35.015D.

**MULTI-STORY REQUIREMENTS**

Projects on lots that are greater than 10,000 sf are required to be three (3) or more stories in height to be eligible for the MUPTE Program per BMC 12.35.015(C). The development site is located on a lot larger than 10,000 square feet and is proposed to be six stories and therefore satisfies this requirement.

**HOTELS, MOTELS, SHORT TERM VACATION RENTALS ON SITE**

The MUPTE Program requires that projects include a restriction on transient occupancy uses, including use by any person or group of persons entitled to occupy for rent for a period of less than 30 consecutive days (including bed and breakfast inns, hotels, motels, and short-term rentals). If Council approves this project, the applicant will need to demonstrate a restriction of uses on the property for the period of the exemption satisfactory to the City before staff certifies the exemption with the County Assessor’s office. The applicant has submitted a draft covenant that includes this restriction as part of their application; this must be reviewed and approved by the City prior to recording.

**DEMONSTRATION OF FINANCIAL NEED**

The applicant submitted a pro forma income statement both with and without the tax exemption to demonstrate that the project would not be financially viable but for the property tax exemption. These pro formas were then reviewed by a third party independent financial consultant hired by the City.

PNW Economics completed a review of the pro formas. A summary of their findings is included as Attachment A. The review confirms that the Timber Yards Parcel A Mixed-Use Project is not financially feasible on its own, noting that the project’s income does not justify its operating expenses with a return of investment (ROI) of 5.3% without MUPTE and 5.9% if awarded MUPTE. The financial analysis estimated that the developer’s return would be slightly higher than forecasted by the applicant however given that 6% ROI is a rule-of-thumb minimum, the project can be considered financially challenged even with MUPTE.

The financial review did note that the developer’s proforma included higher operating expenses on a cost per unit basis compared to other projects, most notably the Jackstraw, but is still in alignment with projects seen in Eugene. Staff asked the applicant to provide more information about the assumptions for their operating costs. Their response was the following:

- Kennedy Wilson has a portfolio of over 25,000 apartments on the West Coast (CA, NV, WA, OR, AZ, ID, UT and MT) which we analyze when budgeting operating expenses for a new development. The expenses provided in the analysis are budgeted based on real-time operating expenses at similar properties (accounting for typology of the buildings, unique geographic and labor constraints, etc). We also engaged the property management company Avenue 5, who is actively managing multiple properties in the Bend market, to validate and provide input on both the operating revenue and expenses.
- The analyst points out that the estimated operating expenses for Timber Yards Parcel A is \$6,214/unit compared to Jackstraw at \$4,908/unit. The difference is primarily attributed to the fact that Jackstraw is a substantially larger project (87 more units) which allows it to spread the fixed operating costs across those additional units which generates substantial economies of scale. One of the largest components of expenses is payroll which really doesn't fluctuate substantively between 250 and 350 units as it takes the same amount of headcount to manage the property (leasing agent, community director, etc) with the exception of maintenance load which scales more linearly with unit count. It's not realistic economically to assume a 250-unit property can operate as efficiently as a 300+ unit property as Table 9 in the analysis analyzes.

The independent financial review conducted a sensitivity analysis, assuming that operating expenses for the project were similar to the Jackstraw on a per unit basis and found that the project proforma performed slightly better (6.2% ROI with MUPTE) but still below the 6% minimum threshold without MUPTE.

**JUSTIFICATION FOR ELIMINATION OF ANY EXISTING HOUSING AND BUSINESSES ON THE PROJECT SITE**

The site is currently vacant and will not eliminate or displace any housing or commercial uses, therefore no mitigation is necessary to meet the requirements of the MUPTE program.

**PUBLIC BENEFIT REQUIREMENTS**

MUPTE requires that applicants provide three public benefits including one priority public benefit to qualify for the MUPTE program, per BMC 12.35.025.

***Priority Public Benefit***

The project is pursuing Open Space as a priority public benefit. To satisfy this requirement, a project must dedicate more than 10% of the site area as a publicly accessible open space, park, or plaza with usable amenities. Publicly accessible is defined as land available for public use for the purpose of providing places for recreation, conservation, and other open spaces uses and must be dedicate either to Bend Park and Recreation District (BPRD), or as a public access easement in perpetuity. The applicant must submit a letter from BPRD stating that the applicant has coordinated with BPRD on the proposed open space/park/plaza area and demonstrate how the applicant considered BPRD's comments. The open space, park or plaza

area provided in one continuous area is preferred; non-contiguous areas may be approved if providing sufficient public benefit, as determined by City Council.

The applicant is proposing to dedicate 13,343 square feet of contiguous area as a dedicated plaza/open space. The proposed total project area is 120,917 square feet which includes the 115,057 square foot parcel area per the land division (PLLD20230464) as well as the 13,343 square feet of open space (included in Tract A) that shares a boundary with the parcel that is being constructed as part of the project seeking the exemption. Therefore, 11% of the project area would be dedicated open space per the MUPTE Guidelines calculation. The applicant has provided a draft public access easement for the City to consider for approval in order to accept the Open Space dedication; the draft easement language must be approved by City staff prior to recording, to meet this criterion. In addition, the open space area included in Tract A further south of this application will include a mobility hub per the Timber Yards Master Plan requirements which will provide additional public benefit with enhanced access to transit and micromobility services to this site.

In addition, the applicant submitted a letter from Bend Park and Recreation District dated September 8, 2023, that confirms the applicant met with BPRD staff in July of 2023 and that BPRD staff believe the project as proposed generally aligns with the intent of the MUPTE program, with the following three comments:

- Plaza Size: Consider increasing the area within a public access easement to include the plaza proposed on Parcel B of the Master Plan area to ensure its availability to the public.
- Contiguous: Consider alternative open space configuration to facilitation a contiguous open space area.
- Differentiation of Private and Public Space: Consider different surface treatments/materials to help demarcate the space and ensure the availability of the public plaza for the general public at all times.

The applicant first submitted an open space plan that included two non-contiguous open space areas. The applicant later revised their application (in January of 2024) to include one contiguous open space area. City staff sent the revised materials to BPRD staff on January 9, 2024, for their review.

In a series of email communications dated January 11, 2024, BPRD staff noted their appreciation for the revision of plans to provide contiguous open space consistent with the MUPTE guidelines. The applicant clarified that an additional dedication of the public access easement on the anticipated plaza of Timber Yard's Parcel B was not feasible since it would encumber adjacent land associated with a different project/property/operator. They did state however that the intent of the additional plaza area planned south of Parcel A is intended to be open to the public as well as provide a public benefit in some manner. The applicant further explained that their intent is to create a visual line or pattern in hardscape that demarcates the



private and public realm areas in the planned Open Space but the applicant does not have that level of design developed yet for the site.

The applicant has satisfied the MUPTE Program requirements for this public benefit criteria.

**Additional Public Benefits**

In addition to the Priority Public Benefit, the applicant is required to provide two additional public benefits. The applicant has identified the following benefits to meet those requirements: 1) Enhanced Landscaping and 2) Wrapped Parking Structure.

*Enhanced Landscaping:* The applicant has submitted preliminary landscaping plans developed by GGLO that are consistent with Chapter 12 of the Bend Code and Chapter 3.2 of the Bend Development Code. The current plans include no grass areas. Future approval will be conditioned based on future staff verification that the applicant meets Chapter 12 of Bend Code and Chapter 3.2 of the Bend Development Code as well as the submittal and approval of a water budget and irrigation plan for the site. The City will monitor water use throughout the 10-year exemption period. The site cannot exceed 20% above the approved water budget during the exemption period.

*Wrapped Parking Structure:* For above-grade parking structures, the project must provide retail and residential uses on the street level for any frontages on roads with a classification higher than an alley. The applicant provided a site plan, floor plans and elevations that demonstrates the planned parking structure meets this requirement as verified by planning staff.

**ESTIMATED EXEMPTION**

This project is estimated to receive a total 10-year tax exemption of approximately **\$8,368,000 on residential and parking improvements** based on an estimated building value of \$109,421,937 between 2028 through 2037.

If the project were to not move forward, total tax collection for the 10-year period of the site would be approximately \$282,600.

Since this project is located within the Core Area Tax Increment Finance (TIF) Area, there is no anticipated impact to any taxing district apart from the Bend Urban Renewal Agency’s Core Area TIF fund. The project, if approved for the tax exemption is estimated to generate approximately \$20.4 Million in total revenue over the 30-year lifetime of the Core TIF Area. Table 1 demonstrates the tax collection that would take place on the site in year 11, after the the exemption period in both a no build and build scenario of the project. The data shows that in Year 11, total tax collection for the site would increase by 1,061% when the exemption expires. The table demonstrates the tax benefits to the Bend Urban Renewal Agency starting in Year 11 if this project is approved for MUPTE and moves forward.

**Table 1. Forecasted tax collection by Taxing District in Year 11 (2038)**

District	No Project is Built	Proposed Project is Built
Bend Urban Renewal Agency*	\$48,718	\$517,000

*\*Since this project is in the Core Area TIF Area, there is no anticipated tax collection by any other district in Year 11. All taxing districts will receive higher property values on this property when the TIF Area expires which is set to take place in 2051.*

Estimates are based on the value of building as provided by the developer, the proportion of the project is commercial as provided by the developer, and timeline is as provided by the developer. The estimate is preliminary and subject to change and is based on a variety of factors including Deschutes County Tax Assessor's assessment of the property and future change property ratio (CPR) rates. Estimates could also vary depending on when the Core Tax Increment reaches the maximum indebtedness established in the Plan (\$195 Million).

**TAXING DISTRICT REVIEW PROCESS**

For the tax exemption to apply to the full taxable amount, approval of the policy of the MUPTE by taxing district agency boards that comprise at least 51% of the combined tax levy is required. On January 9, 2024, the Bend La Pine School District, which comprises approximately 41% of the combined tax levy, passed a resolution supporting the policy of providing property tax exemptions for multiple unit housing projects that qualify for the City of Bend’s MUPTE program within the Core Area TIF Area through June 30, 2025. Therefore, the applicant will qualify for the full tax exemption if their project is approved by City Council since this project is located within the Core TIF Area. Since the applicant is planning to utilize the Open Space Public Benefit, City staff confirmed with Bend Park and Recreation District (BPRD) staff that they did not want a presentation from this applicant following the School District’s January approval of the policy.

Pursuant to City program guidelines, all of the Taxing District agencies were provided with a minimum 45-day comment period to review the application materials and this staff report beginning on February 1, 2024, through Council’s scheduled review of the application on March 20, 2024. District comments will be provided to City Council for their consideration of the application on:

- March 20, 2024: City Council Review and Decision on Application

**CONCLUSION:** Based on the application materials submitted by the applicant, the independent financial review, and these findings, the project meets all applicable criteria for City Council approval.

**CONDITONS TO BE MET IF APPROVED, IN ADVANCE OF EXEMPTION CERTIFICATION WITH TAX ASSESSOR’S OFFICE:**

- 1. Applicant must provide proof of a deed restriction satisfactory to the City that prohibits the use of hotels, motels, and short-term vacation rentals on the site for the period of the exemption.
- 2. Applicant must provide a public access easement satisfactory to the City on the proposed open space area and the open space area must be built as approved in the site plan before the exemption is issued.
- 3. Applicant must demonstrate compliance with Enhanced Landscaping Requirements to be verified by staff.
- 4. Applicant must submit a water budget to City staff for approval prior to exemption certification. The City will monitor water use throughout the 10-year exemption period. The site can’t exceed 20% above the water budget for the site during the exemption period.
- 5. City to verify construction of wrapped parking as proposed in approved site plan and building permits before exemption is issued.

**ATTACHMENTS**

- Attachment A:** Review of Financial Feasibility, PNW Economics
- Attachment B:** Application Materials

REVIEW OF FINANCIAL  
FEASIBILITY  
TIMBER YARDS PARCEL A  
LOT 1 PROJECT  
MUPTTE PROGRAM  
APPLICATION

Prepared for: City of Bend, Oregon

Prepared by: PNW Economics, LLC

This Page Intentionally Left Blank

**Contents**

- 1. Executive Summary..... 1
  - Introduction..... 1
  - Summary of Findings..... 1
- 2. Financial Feasibility Analysis .....3
  - Financial Feasibility (“Pro Forma”) Assumptions .....3
    - Debt vs. Equity & Project Financing .....3
    - Development Costs .....3
    - Assumed Rents & Escalation .....4
    - Non-Rent Revenues .....5
    - Operating Expenses .....6
  - Financial Feasibility Analysis of the Timber Yards A/1 Project .....8
    - Introduction to Terms.....8
    - Timber Yards A/1 Project Pro Forma With & Without MUPTE: Developer Operating Expenses ...9
    - Timber Yards A/1 Project Pro Forma Sensitivity Analysis: Lower Operating Expenses ..... 10

This Page Intentionally Left Blank

# 1. Executive Summary

## Introduction

PNW ECONOMICS, LLC was retained by the City of Bend to review the Kennedy Wilson Timber Yards Parcel A, Lot 1 (“A/1”) Project Multi-Unit Property Tax Exemption (“MUPTE”) program application as part of City review of the project application. Specifically, PNW ECONOMICS was tasked with:

- Reviewing project application assumptions including rent income, non-rent income, operating expenses, bank underwriting assumptions, and other pertinent assumptions;
- Evaluating projected return on investment for the project without MUPTE and with MUPTE, which grants a ten-year property tax exemption for the project in order to incentivize its financial performance such that investment and development is possible and positively contributes to the Bend economy in place of property underutilization; and
- Communicating all analysis and findings appropriately for review by community members and elected officials.

This document represents completion of these tasks for review by the City of Bend and its partners and stakeholders.

## Summary of Findings

An independent pro forma analysis was conducted by PNW ECONOMICS for the proposed Timber Yards A/1 project in the Old Mill District of Bend. The following table provides a concise summary of the outcome of not awarding and awarding a MUPTE to the project, which comprises 246 apartment units and 15,623 square feet<sup>1</sup> of retail space.

**Table 1 – Timber Yards A/1 Project Measures of Return With & Without MUPTE: 246 Units & 15,623 Sq. Ft. Retail**

	<b>MUPTE Award?</b>	
	<b>YES</b>	<b>NO</b>
<b>Income</b>		
Lease Income	\$7,518,675	\$7,518,675
Other Income	\$1,559,026	\$1,559,026
Less: Vacancy Loss	(\$453,885)	(\$453,885)
Gross Income	\$8,623,817	\$8,623,817
<b>Expenses</b>		
Pre-Tax Operating Expenses	(\$1,637,487)	(\$1,637,487)
Property Taxes	(\$813,207)	(\$813,207)
<b>MUPTE Awarded</b>	<b>\$747,903</b>	<b>\$0</b>
Total Operating Expenses	(\$1,702,792)	(\$2,450,695)
<b>Net Operating Income (NOI)</b>	<b>\$6,921,025</b>	<b>\$6,173,122</b>
<b>Total Development Cost</b>	<b>\$116,952,000</b>	<b>\$116,952,000</b>
<b>Return on Investment (Cost)</b>	<b>5.9%</b>	<b>5.3%</b>

<sup>1</sup> Net rentable square feet. Gross retail square footage that includes common area or other non-rentable space is 16,445 square feet.



**Without MUPTE Conclusion: The Timber Yards A/1 project falls short of minimum Return on Investment metric.** Employing a minimum Return on Investment (Cost) measure of return of 6% as a result of thumb for project pursuit, the Timber Yards A/1 project’s income does not justify its operating expenses, with an ROI of 5.3%. The rule-of-thumb minimum ROI of 6% would indicate the project has inadequate return by this metric, but not dramatically.

**With MUPTE Conclusion: The Timber Yards A/1 project reaches the cusp of minimum ROI benchmark with the MUPTE and only with the tax exemption compared to the No MUPTE scenario.**

- A MUPTE awarded that would reduce a roughly \$747,903 property tax burden for the development is estimated to enhance ROI for the project to 5.9% compared to 5.3% without the MUPTE.
- Although a MUPTE award would enhance expected feasibility of the project and enhance assurance of its success, the estimated ROI with the MUPTE still does not quite reach the applied 6% rule-of-thumb minimum. In other words, the MUPTE is a critical aid in this project happening, but it can still be viewed as a challenged project with higher risk.

In general, assumptions by the Applicant were reviewed and seemed reasonable or within a range of competitiveness with other reasonably comparable projects in Bend, most notably the Jackstraw. Key Applicant assumptions are verified in this report in the context of displayed data for other projects for comparison.

Review of all development and financial assumptions in the MUPTE Application for the Timber Yards A/1 project yielded the following other general finds and comments:

- The Timber Yards A/1 project has rents assumptions that are seemingly consistent with market conditions in Bend among newer projects.
- Development costs of the project are seemingly consistent with current construction market conditions, as verified by comparable projects planned or under construction.
- Non-rent revenues were found to be somewhat high, but assuming higher revenues will tend to weaken an argument for a MUPTE, all things equal, not make a MUPTE seem more necessary.
- Operating expenses, on a cost-per-unit basis, are significantly higher for the Timber Yards A/1 project than for its peer group, most notably the Jackstraw, in fact over 26% higher.

Based on the significant difference in operating expenses for the Timber Yards A/1 project, a MUPTE sensitivity analysis was conducted assuming operating expenses more on par with the Jackstraw. Those results are found in the final section of this report and indicate that lower expenses do materially strengthen the project, though not dramatically. PNW Economics recommends the City of Bend seek clarification on the assumed operating expenses of the Timber Yards A/1 project and why on a cost-per-unit basis they are notably higher.

## 2. Financial Feasibility Analysis

### Financial Feasibility (“Pro Forma”) Assumptions

#### Debt vs. Equity & Project Financing

Table 2 provides a summary of project permanent financing assumptions considered in this analysis. The Applicant documents that 68% of total development cost will be debt financed, while 32% will be equity-financed. Financing much more than 50%-55% of development cost has been less common the past couple of years due mostly to perceived risk in the lender market, particularly accelerated by two sizeable bank failures early in 2023. But lending assumptions also vary with developer and their size, reach, and access to different sources of financing and equity with more (or less) experience with such projects.

From a development economic return perspective, higher debt as percentage of total cost tends to make Cash Flow lower, all things equal. That is, Net Operating Income less debt service is Cash Flow. Lower cash flow, than if the project required more equity investment and less debt, will tend to translate into otherwise lower Cash-on-Cash return for the project. As this project utilizes Cash-on-Cash return as a key metric of economic viability, the ultimate impact of these financing assumptions upon measure of return for Timber Yards A/1 will be particularly noted later in this report.

**Table 2 – Timber Yards A/1 Project Permanent Debt Finance Assumptions**

	<b>246 Units</b>
	<b>2023 Dollars</b>
<b>Total Development Cost</b>	\$116,952,000
<b>Permanent Loan</b>	\$79,394,801
<b>Equity</b>	\$37,557,199
<b>Percent Financed</b>	68%
Annual Interest Rate	5.75%
Amortization (Years)	30
Annual Permanent Debt Service	(\$5,614,502)

#### Development Costs

Timber Yards A/1 MUPTE application materials indicate a total development cost of \$116,952,000 for the 246-unit, 331,469 square-foot improvement. The project’s more urban orientation, not unlike the Jackstraw but smaller, includes a two-story parking structure. Accordingly, PNW Economics compares the project to the Jackstraw as well as the Riverfront 3A mixed-use development in Eugene as a peer group of comparable, relative size, parking, mix of uses, and vintage of cost information. Table 3 provides a comparison of the three projects with appropriate details.

The Timber Yards A/1 project overall has development cost metrics not unlike its peer group, and in fact very similar to the Jackstraw on a per-square-foot cost basis.

- Total Cost per Unit: \$475,415 (Timber Yards A/1) vs. \$546,956 (Jackstraw)
- Total Cost per Sq. Ft.: \$353 (Timber Yards 1/A) vs. \$357 (Jackstraw)

**Table 3 – Timber Yards A/1 Comparative Development Costs**

	Bend Timber Yards A/1	Bend Jackstraw	Eugene Riverfront 3A
<b>Units</b>	<b>246</b>	<b>313</b>	<b>237</b>
<b>Total Sq. Ft.</b>	<b>331,469</b>	<b>480,000</b>	<b>272,983</b>
Land Acquisition	\$7,530,102	\$7,662,931	\$2,782,504
Hard Costs	\$88,807,991	\$127,186,251	\$96,444,138
Soft Costs & Contingencies	<u>\$20,613,946</u>	<u>\$36,348,016</u>	<u>\$27,545,538</u>
Total Development Costs	<b>\$116,952,039</b>	<b>\$171,197,198</b>	<b>\$126,772,180</b>
<b>Total Cost Per Unit</b>	\$475,415	\$546,956	\$534,904
<b>Total Cost per Sq. Ft.</b>	\$353	\$357	\$464

Jackstraw project costs include a number of open space, public space, and pedestrian way improvements among other Public Good investments for the stand-alone development. Accordingly, total costs and total costs per unit are higher than for the Timber Yards A/1 generally. The Subject project does include Public Good investments, but as the first phase of the much larger master planned Timber Yards development, this first project does not have as much non-structure cost included. Overall, Timber Yards A/1 costs do line up credible with most-recent mixed-use projects that include public space investments and structured parking.

**Assumed Rents & Escalation**

Table 4 provides a summary of apartment rents utilized in the pro forma analyses in this section. Rents assumed are planned rents for each of the unit types as proposed by the Applicant. Annually after 2024, rents are assumed to escalate by 3.5% annually.

Rents overall appear consistent with newest projects including the Jackstraw project. Projects delivered in 2022 or earlier do exhibit rents proposed at the Subject, Jackstraw, The Current and The Nest. The exception seems to be the Townhouse units at Timber Yards A/1, which on a per-square-foot rent basis are higher than the limited number of townhouse units present in other newer projects. Gross rents for townhouse units at the Subject are comparable to others, however, but the Timber Yards A/1 Townhouse units are smaller. Higher rents per square foot are the result.

Overall average rents at the Subject are extremely similar to the Jackstraw, but that is logical as from locational and market delivery (newest) perspectives, Timber Yards A/1 should conceivably be head-to-head competitive with planned Jackstraw rents. Examples of other more recent market offerings for apartments in Bend include:

- **The Current** (954 SW Emkay Drive, Bend) – the newest project to delivery identified in the city:
  - 416 average square foot Studio units for \$1,649 average (\$3.98 per square foot).
  - 548 square foot 1 bed units for \$1,809 average (\$3.30 per square foot).
  - 934 square foot 2 bed units for \$2,363 average (\$2.53 per square foot).
  - 1,359 square foot Townhouse units for \$3,299 average (\$2.43 per square foot).
- **The Nest** (1609 SW Chandler Avenue, Bend):
  - 481 average square foot Studio units for \$1,890 average (\$3.93 per square foot).
  - 1,049 square foot 2 bed/2 bath for \$2,792 average (\$2.66 per square foot)
- **Solis at Petrosa** (63190 Deschutes Market Road):
  - 620 square foot 1 beds for \$1,805 average (\$2.91 per square foot).

- 885 square foot (average) 2 beds for \$2,229 average (\$2.52 per square foot).
- 1,132 square foot 3 beds bath for \$2,575 (\$2.27 per square foot).
- **The Eddy Apartments** (801 SW Bradbury Way): 678 square foot 1 bed for \$1,913 average (\$2.82 per square foot).
- **Outpost 44 Apartments** (643 NE Ross Road) – located more distantly from the river, central commercial district amenities and east of Highway 97 thus reflecting lower rents than the rest of the peer group.
  - 734 square foot 1 beds for \$1,770 average (\$2.41 per square foot).
  - 1,036 square foot 2 beds for \$1,925 (\$1.86 per square foot).
  - 1,376 square foot 3 beds for \$2,325 (\$1.69 per square foot).
  - 1,588 square foot Townhouse units for \$3,240 (\$2.04 per square foot).

**Table 4 – Timber Yards A/1 Project Market Apartment Rents Compared w/Jackstraw – 246 Units**

**Timber Yards A/1**

<b>MARKET RATE</b>	<b>Unit Mix</b>		<b>Average Unit</b>	<b>Monthly</b>	<b>Rent per</b>
<b>Unit Type</b>	<b>Units</b>	<b>Percentage</b>	<b>Size (Sq. Ft.)</b>	<b>Rent</b>	<b>Square Foot</b>
Studio	23	9%	530	\$1,805	\$3.41
One bedroom	157	64%	744	\$2,139	\$2.88
Two bedroom	51	21%	990	\$3,102	\$3.13
Townhouses	15	6%	1,119	\$3,293	\$2.94
<b>Subtotals/Averages</b>	<b>246</b>	<b>100%</b>	<b>798</b>	<b>\$2,378</b>	<b>\$2.98</b>

**Jackstraw**

<b>MARKET RATE</b>	<b>Unit Mix</b>		<b>Average Unit</b>	<b>Monthly</b>	<b>Rent per</b>
<b>Unit Type</b>	<b>Units</b>	<b>Percentage</b>	<b>Size (Sq. Ft.)</b>	<b>Rent</b>	<b>Square Foot</b>
Studio	15	5%	483	\$1,824	\$3.78
One bedroom	189	61%	669	\$2,167	\$3.24
Two bedroom	91	29%	1,091	\$2,993	\$2.74
Three bedroom	16	5%	1,460	\$3,360	\$2.30
<b>Subtotals/Averages</b>	<b>311</b>	<b>100%</b>	<b>824</b>	<b>\$2,453</b>	<b>\$2.98</b>

From a MUPTE-modeling perspective, higher rents in the pro forma will tend to make the need for a MUPTE less likely. That is, higher rent income will tend to increase Net Operating Income (NOI) as well as cash flow, which is simply NOI less debt service. Project rents that are inexplicably low relative to market would run the risk of overstating MUPTE need.

That is not the case here. In context, market rents at Timber Yards A/1 are competitive with most comparable, new apartment projects in Bend and specifically on-par with the Jackstraw, the most-comparable project to the Subject due to similar locational, unit similarities, and planned quality.

**Non-Rent Revenues**

Table 5 summarizes the various sources of revenue for the project in addition to standard rent planned for the occupancy for housing units. The key feature of the project will be 254 parking spaces expected to rent

monthly or an average of \$81.93. That may include a blend of higher and lower-cost parking space exclusive to residences, or a mix of space with some available to retail or other visitors. Greater detail of parking fee structure we not provided for review.

**Table 5 – Timber Yards A/1 Project Non-Apartment Rent Income Assumptions**

Non-Apartment Rent Revenue	Monthly	Annual	
	Timber Yards A/1	Timber Yards A/1	Jackstraw
Parking (monthly rate 254 stalls)	\$81.93 per stall	\$249,723	
Retail (16,445 sf leaseable)	\$43.71 / sq. ft.	\$718,811	
Other (Misc. Fees, Deposits)	\$1,979 per unit	<u>\$486,834</u>	
Total Non-Rent Revenue:		<b>\$1,455,368</b>	<b>\$1,240,403</b>
Total Per Unit		<b>\$5,916</b>	<b>\$3,725</b>

Retail space is expected to rent for \$43.41 per square foot per month. That would be at or near top-of-market as published, generally available space and lease rates in the vicinity of the Old Mill District tend to top out at \$39 per square foot for established space.

Overall, PNW Economics considers non-rent income assumed by the Timber Yards A/1 to be on the high side, certainly compared to the average reported for the nearby Jackstraw in Table 5. However, high assumed revenues will tend to understate the need for a MUPTE and, therefore, from the City’s perspective are conservative.

PNW Economics will utilize Applicant assumptions for non-rent income as a result.

**Operating Expenses**

**Apartment Operating Expenses**

Table 6 below provides a comparison of annual operations expenses per unit anticipated by the Applicant excluding property tax expense. For context, annual per-unit operating expenses for the Jackstraw and Penn Avenue, different apartment projects applying for or having applied for a City of Bend MUPTE, as well as recent urban apartment MUPTE applicants in the City of Eugene are compared.

Based upon these findings, PNW Economics finds Timber Yards A/1 operating expenses-per unit to be elevated by 27% relative to the other Bend projects seeking or having sought a MUPTE, but modestly less than projects in Eugene that have applied for that city’s MUPTE. Since Jackstraw is the most comparable project to Timber Yards A/1, gross annual operating expenses at stabilized year (95% occupancy) are below:

- Timber Yards A/1: \$1,528,612 annually;
- Jackstraw: \$1,534,570 annually.

Gross operating expenses for the entirety of each project differs by only \$5,958 annually, or by only 0.4%. The negligible difference in gross operating costs is noteworthy as the projects are similar enough for comparison purposes, with the realization that the Jackstraw has 87 more residential units to manage than Timber Yards A/1.

**Table 6 – Timber Yards A/1 Project Operating Expenses Per Unit vs. Comparable Projects**

	Per Unit Expenses Annually			
	Timber Yards A/1	Jackstraw	Penn Avenue	Eugene Projects*
Before Property Tax				
Expenses: Stabilized	\$6,214	\$4,903	\$4,679	\$6,700

\*Non-55+ active community projects

Based on this review, PNW Economics recommends the City of Bend consider asking the Applicant to clarify operating expenses for the Subject. Higher per-unit operating expenses relative to the Jackstraw should be explained because such higher costs end up having potentially significant impact upon Timber Yards A/1 Net Operating Income and Cash Flow:

- Gross operating expenses in the MUPTE application: \$1,528,612
- Gross operating expenses assuming Jackstraw per-unit cost (\$4,903): \$1,206,084
- Delta to Timber Yards A/1 NOI and Cash Flow: \$322,528 annually.

In other words, if Timber Yards A/1 operating expenses were more on par with the Jackstraw, its pro forma would report \$322,528 more annually for NOI and Cash Flow, which in turn would significantly improve the project pro forma without (and with) a MUPTE.

PNW Economics will assume Applicant operating expenses, but will also consider in the final analysis what the specific impact upon MUPTE need is should operating expenses be inexplicably elevated.

**Property Taxes**

Table 7 provides estimates for property taxes that will be paid on both the land as well as expected improvements value on a “Cost of Replacement” basis – the total development cost of improvements alone if built new.

Parcel taxable assessed value (TAV) data is directly from the Deschutes County Assessor’s Office parcel database online (DIAL). Taxable assessed value for land associated with Timber Yards A/1 is calculated utilizing the fact that the site is 11.53% of the total land area of the single, larger master planned 21.41-acre property.

Taxable assessed value estimated for the value of improvements assumes total improvement development costs as expressed by the Applicant and then converted to Measure 50 TAV via the Deschutes County 2023-24 Multifamily Exception Value Ratio of 0.403 and Commercial Exception Value Ratio of 0.449. Finally, the tax rate of \$15.9868 per \$1,000 of TAV was utilized for Tax Code Area 1128 that includes the project address of 175 SW Industrial Way in Bend, Oregon.

Property tax bills for the Timber Yards A/1 site, along with its multifamily housing component and its commercial component are summarized for the first year (Year 1) below:

- Land only: \$469,390 TAV and \$7,504 calculated property tax.
- Multifamily improvements only: \$44.1 million TAV and \$704,971 calculated property tax.
- Commercial improvements only: \$3.38 million TAV and \$54,051 calculated property tax.

**Table 7 –Timber Yards A/1 Project Estimated Property Tax: Land & Improvements in FY 24 (First Year)**

				Cost of Replacement - Improvements	\$109,421,937		
				Exception Value Ratio - Multifamily (7)	0.403		
				<b>FY 24 Taxable Assessed Value</b>	<b>\$44,097,041</b>		
				Cost of Replacement - Retail Improvements	\$7,530,063		
				Exception Value Ratio - Commercial (2)	0.449		
				<b>FY 24 Taxable Assessed Value</b>	<b>\$3,380,998</b>		
				<b><u>Taxable Assessed Value (FY 24)</u></b>			
<b><u>Parcel</u></b>	<b><u>Account #</u></b>	<b><u>Acres</u></b>	<b><u>Zoning</u></b>	<b>Land</b>	<b>Improvements</b>	<b>Total</b>	
175 SW Industrial Way	117562	2.15	300 - Industrial	\$469,390	\$0	\$469,390	
				Tax Code Area 1128 (per \$1,000 TAV)	15,9868	15,9868	15,9868
				<b>Total Property Tax - Land Only</b>	<b>\$7,504</b>	<b>\$0</b>	<b>\$7,504</b>
Multifamily Improvements				\$0	\$44,097,041	\$44,097,041	
				Tax Code Area 1128 (per \$1,000 TAV)	15,9868	15,9868	15,9868
				<b>Total Property Tax - Multifamily Improvements</b>	<b>\$0</b>	<b>\$704,971</b>	<b>\$704,971</b>
Commercial Improvements				\$0	\$3,380,998	\$3,380,998	
				Tax Code Area 1128 (per \$1,000 TAV)	15,9868	15,9868	15,9868
				<b>Total Property Tax - Commercial Improvements</b>	<b>\$0</b>	<b>\$54,051</b>	<b>\$54,051</b>
175 SW Industrial Way		2.15	300 - Industrial	\$469,390	\$47,478,039	\$47,947,429	
				Tax Code Area 1128 (per \$1,000 TAV)	15,9868	15,9868	15,9868
				<b>Total Property Tax - All Combined</b>	<b>\$7,504</b>	<b>\$759,022</b>	<b>\$766,526</b>

For MUPTE analysis purposes, this report excludes the value of commercial development similar to its exclusion from the Jackstraw project MUPTE analysis. Accordingly, key MUPTE property tax figures for the first year (Year 1) are as follows:

- Property tax payment (FY24) not applicable to MUPTE: \$7,504 + \$54,051 = \$61,555. This figure represents tax to be paid on land and commercial improvements, neither subject to the MUPTE.
- Property tax payment (FY24) subject to a MUPTE: \$704,971. This figure represents tax to be paid on the value of multifamily housing improvements and could be the value of a MUPTE if it is awarded.
- Total property tax payment (FY24): \$766,526. This represents the whole property tax bill for Timber Yards A/1 land and all improvements should the project not receive a MUPTE.

**Financial Feasibility Analysis of the Timber Yards A/1 Project**

**Introduction to Terms**

To evaluate whether or not a project is financially feasible, that is whether or not the project meets investment rates of return benchmarks, a pro forma analysis is conducted. A pro forma is simply a financial modeling exercise to examine how a development project performs as a business investment over a specified period of time.

Variables that are modeled, or estimated, in this report are as follows:

Apartment Rent Income: The annual rent income if all apartment units in a project were occupied and charging full, assumed market rent.

Gross Project Income: The sum of Apartment Rent Income, Retail Lease Income and Other Income streams such as parking, storage fees, electric vehicle parking fees, bike storage fees, electric bike charging fees and other related fee streams.

Vacancy: 5% of apartment space and retail space is assumed to always be vacant and represent income loss.

Lease-Up Vacancy & Concessions: This category of expense reflects different sources of loss to revenue as a result of project vacancy and discounts to apartment rents to realize and keep an average 5% vacancy rate.

Effective Gross Income: Gross Project Income less Vacancy and Lease-Up Vacancy & Concessions.

Operating Expenses: Average annual operating expenses of \$6,214 per apartment unit to start.

MUPTE: When included, MUPTE is a 10-year exemption from local property taxes levied on the value of the improvement constructed in place, in this case the Timber Yards A/1 project. Based on an estimated multifamily housing cost-of-replacement of \$109,421,937 in 2023 dollars and a local, existing total property tax rate of \$0.0159868 (Tax Code Area 1128), the estimated MUPTE exemption beginning in year 1 would be \$704,971. This would increase by an assumed 3% annually, consistent with the annual maximum under Oregon property tax law.

Net Operating Income (NOI): Effective Gross Income less Project Operating Expense plus the MUPTE (if assumed).

Equity: The share of total development cost that is funded by invested dollar assets rather than by debt.

Loan-To-Cost (LTC): The amount of debt a project can take on as a percentage of its cost to develop. This analysis assumes a 55% LTC ratio consistent with prevailing commercial lending market conditions, but lower than assumed by the Applicant.

Debt Service: The annual, fixed debt service payment made by the developer for permanent debt financing of the project.

Before Tax Cash Flow: Net Operating Income Less Debt Service.

Cash-on-Cash Return: Before Tax Cash Flow divided by development equity (\$37.56 million in this analysis). Cash-on-Cash Return is frequently also called Return on Equity and usually needs to be at least 6% in early years of a project to be a satisfactory investment for equity partners in a project. This can vary depending upon developer and equity partners, however.

Return on Investment (Cost): ROI is calculated as “stabilized” Net Operating Income divided by Total Development Cost, here stabilized refers to the project when it is 95% occupied and has stable annual income. There is no hard rule for acceptable ROI for a real estate development project, but a common minimum ROI for moving forward with a development is 6%. Developers will vary on required ROI to go through with a project, but a minimum of 6% is a common minimum.

**Timber Yards A/1 Project Pro Forma With & Without MUPTE: Developer Operating Expenses**

Table 8 reports the Return on Investment (Cost) pro forma for the Timber Yards A/1 project with and without a MUPTE assuming the Applicant’s elevated operating expenses as detailed earlier in this report.



**Table 8 – Timber Yards A/1 Project NOI and ROI With & Without MUPTE: Developer Operating Expenses**

	MUPTE Award?	
	YES	NO
<b>Income</b>		
Lease Income	\$7,518,675	\$7,518,675
Other Income	\$1,559,026	\$1,559,026
Less: Vacancy Loss	(\$453,885)	(\$453,885)
Gross Income	\$8,623,817	\$8,623,817
<b>Expenses</b>		
Pre-Tax Operating Expenses	(\$1,637,487)	(\$1,637,487)
Property Taxes	(\$813,207)	(\$813,207)
<b>MUPTE Awarded</b>	<b>\$747,903</b>	<b>\$0</b>
Total Operating Expenses	(\$1,702,792)	(\$2,450,695)
<b>Net Operating Income (NOI)</b>	<b>\$6,921,025</b>	<b>\$6,173,122</b>
<b>Total Development Cost</b>	<b>\$116,952,000</b>	<b>\$116,952,000</b>
<b>Return on Investment (Cost)</b>	<b>5.9%</b>	<b>5.3%</b>

It should be noted that in this set of results, and in the second scenario that follows where Jackstraw-equivalent per-unit operating expenses are modeled all generally assume 2026 is the stabilized project year. As such, all major pro forma variables but development cost have been escalated by 3.0% to 3.5% annually for two years in attempt at consistency. Property tax expense and calculated MUPTE were escalated for two years at only 3.0% per Measure 50 requirements.

Assuming a minimum ROI benchmark for a project of 6.0%, the project as modeled in Table 8 falls short of feasibility with a 5.3% calculated ROI. However, with a \$747,903 MUPTE for the value of multifamily housing improvement, excluding land and commercial improvements, the project reaches the cusp of 6.0% ROI with a calculated 5.9%.

Finally, results of the analysis are similar to “Trended” Return Metrics reported by the Applicant, if not slightly higher. This analysis calculated slightly higher MUPTE value reflecting 2026 property tax values, among other slight differences. The Applicant found without MUPTE a 5.0% (4.95%) Return on Investment and with MUPTE, a 5.7% (5.68%) ROI.

**Timber Yards A/1 Project Pro Forma Sensitivity Analysis: Lower Operating Expenses**

Table 9 reports the Return on Investment (Cost) pro forma for the Timber Yards A/1 project with and without a MUPTE assuming lower operating expenses than assumed by the Applicant. Recall that in an earlier section, Applicant-assumed operating expenses per-unit were identified to be over 26% higher than the very comparable Jackstraw projected located nearby and currently under construction. Analysis in Table 9 conducts the same analysis as in Table 8, however assuming Timber Yards A/1 operating expenses are not 26% higher than those documented or the Jackstraw, but on par.

**Table 9 – Timber Yards A/1 Project NOI and ROI With & Without MUPTE: Jackstraw Operating Expenses**

	MUPTE Award?	
	YES	NO
<b>Income</b>		
Lease Income	\$7,518,675	\$7,518,675
Other Income	\$1,559,026	\$1,559,026
Less: Vacancy Loss	<u>(\$453,885)</u>	<u>(\$453,885)</u>
Gross Income	\$8,623,817	\$8,623,817
<b>Expenses</b>		
Pre-Tax Operating Expenses	(\$1,291,987)	(\$1,291,987)
Property Taxes	(\$813,207)	(\$813,207)
<b>MUPTE Awarded</b>	<b>\$747,903</b>	<b>\$0</b>
Total Operating Expenses	(\$1,357,291)	(\$2,105,194)
<b>Net Operating Income (NOI)</b>	<b>\$7,266,525</b>	<b>\$6,518,622</b>
<b>Total Development Cost</b>	<b>\$116,952,000</b>	<b>\$116,952,000</b>
<b>Return on Investment (Cost)</b>	<b>6.2%</b>	<b>5.6%</b>

Dialing back operating expenses does have a measurable but not dramatic impact upon project ROI. Without a MUPTE, Timber Yards A/1 stabilized Return on Investment is 5.6%, which does fall short of the rule-of-thumb minimum 6%. But with lower operating costs similar to the Jackstraw, that no-MUPTE ROI is closer to the minimum threshold (5.6% vs. 5.3%).

Assuming a MUPTE is awarded to the project, ROI is calculated at 6.2%, which does exceed the minimum rule-of-thumb, but not by a lot. But by exceeding 6.0% with the MUPTE at 6.2%, lower expenses have indeed had the material effect of pushing the project symbolically closer to minimum feasibility.

It is again noted that different developers will use not only different measures of return, but also different criteria for a minimum and/or successful rate of return for that measure. This analysis employs a rule-of-thumb minimum of 6% return on cost for a project to be worth the risk. On this measure alone, MUPTE makes the Timber Yards A/1 project more compelling than without the MUPTE. If the Applicant internally employs a lower threshold ROI for project evaluation, such as 5%, then it can be said the MUPTE not only makes the project more compelling but certainly assures the project would worth the risk and expense in a way that would not be possible without the MUPTE.

Given that the nature of project operating expenses is a noted contrast to the Jackstraw, the City of Bend should consider seeking clarification of operating costs in the context of comparisons. The project is not a feasibility “home run” with or without the MUPTE, but the operating expense difference makes a measurable impact on ROI measurement.

# Timber Yards Lot 1

## Multiple Unit Property Tax Exemption (MUPTE) Application

---

**Date:** November 2023

**Submitted to:** City of Bend  
710 NW Wall Street  
Bend, OR 97701

**Applicant:** Kennedy Wilson  
151 S El Camino Drive  
Beverly Hills, CA 90212

**AKS Job Number:** 9293-01



2777 NW Lolo Drive, Suite 150  
Bend, OR 97703  
(541) 317-8429

---

## Table of Contents

<b>I.</b>	<b>Executive Summary.....</b>	<b>2</b>
<b>II.</b>	<b>Applicable Review Criteria .....</b>	<b>2</b>
	BEND DEVELOPMENT CODE .....	2
	Title 12, Revenue and Taxation.....	2
<b>III.</b>	<b>Conclusion .....</b>	<b>7</b>

## Exhibits

- Exhibit A:** Legal Description and Proof of Ownership/Deed(s)
- Exhibit B:** Preliminary Site Plan
- Exhibit C:** Proformas with and without Tax Exemptions
- Exhibit D:** Assessor Property Account Number
- Exhibit E:** Project Description
- Exhibit F:** Existing Use of the Site and Justification for Displacement
- Exhibit G:** Private Development Engineering Letter- Sewer and Water Analysis
- Exhibit H:** Bend Parks and Recreation District Letter
- Exhibit I:** Public Benefits Checklist
- Exhibit J:** Open Space and Landscape Plan
- Exhibit K:** Preliminary Architectural Plans
- Exhibit L:** Project Renderings
- Exhibit M:** Parking Floor Plans
- Exhibit N:** Public Access Easement
- Exhibit O:** Restrictive Covenant

---

# Timber Yards – Lot 1 Multiple Unit Property Tax Exemption (MUPTE) Application

**Submitted to:** City of Bend  
710 NW Wall Street  
Bend, OR 97701

**Applicant:** Kennedy Wilson  
151 S El Camino Drive  
Beverly Hills, CA 90212

**Property Owners:** 181205A000500  
KW Kelton-Bend Owner, LLC  
151 S El Camino Drive  
Beverly Hills, CA 90212

**Applicant’s Consultant:** AKS Engineering & Forestry, LLC  
Contact: Joey Shearer, AICP  
shearerj@aks-eng.com  
2777 NW Lolo Drive, Suite 150  
Bend, OR 97703  
(541) 317-8429

**Site Location:** Located east of Bond Street, west of U.S. Route 97, north of SW Scalehouse Loop and south of Industrial Way

**Deschutes County Assessor’s Map:** 18-12-05A; Tax Lot 500

**Site Size:** Timber Yards Lot 1: ±2.47 acres  
Total Area (with abutting open space): ±2.78 acres

**Zoning Designation:** Mixed-Use Urban (MU) within the approved Timber Yards Master Plan

## I. Executive Summary

This application to the City of Bend (City) is submitted on behalf of Kennedy Wilson (Applicant) for the Multiple Unit Property Tax Exemption (MUPTe) for Lot 1 within the approved Timber Yards Master Plan (PLSPD20230065, Ord. No. NS-2476). The Timber Yards Master Plan was approved by the Bend City Council in June 2023. Lot 1 is located on a portion of Tax Lot 500 of Deschutes County Assessor’s Map 181205A, and is subject to a Tentative Subdivision Application (City File# PLLD20230464) currently under review with the City of Bend. Tax Lot 500 is zoned Mixed-Use Urban (MU) and is located within the Core Area Tax Increment Finance (TIF) Area, meeting eligibility requirements for the MUPTe Program.

The new, mixed-use building (City File# PLSPR20230465) on Lot 1 is the cornerstone of Timber Yards—a vibrant, connected, and walkable mixed-use neighborhood—and will include:

- ±246 residential units
- ±15,973 square feet of commercial space for future retail and/or restaurant
- ±254 structured vehicle parking spaces, including at least 40% (±96 spaces) that will be “EV ready”
- Secure storage for ±246 residential bicycles (1 per unit) as well as ±8 additional spaces for retail customers and employees
- ±13,343 square feet of publicly accessible open space in Tract A (abutting Lot 1), ±11.0% of the ±120,927-square-foot (±2.78-acre) total area
- Professionally designed landscaping that emphasizes native, pollinator-friendly, and water wise species and design, enhancing the pedestrian environment and providing an attractive amenity for future residents and visitors

This application includes the City application forms, written materials, and preliminary plans necessary for City staff to review and determine compliance with the applicable approval criteria. The evidence is substantial and supports the City’s approval of the application.

## II. Applicable Review Criteria

### BEND DEVELOPMENT CODE

#### Title 12, Revenue and Taxation

#### Chapter 12.35 Multiple Unit Property Tax Exemption

#### 12.35.015 Eligible Property.

To be eligible for the property tax exemption provided by this chapter, the housing must be a newly constructed structure(s), story(ies), or other additions to existing structure(s) and structure(s) converted in whole or in part from another use to housing that meets the following criteria:

A. Includes three or more dwelling units;

**Response:** The Preliminary Architectural Plans (Exhibit K) show the new multi-family residential project will contain ±246 dwelling units. The criterion is satisfied.

B. Meets the public benefit requirements as described in BC 12.35.030;

**Response:** The code section cited in the criterion above appears to be a typo. The public benefit requirements are addressed in the responses to BC 12.35.025, below.

C. Must be at least two stories in height. Housing that is on lots larger than 10,000 square feet in size must be at least three stories in height;

**Response:** The Preliminary Site Plan (Exhibit B) shows Lot 1 is larger than 10,000 square feet and the Preliminary Architectural Plans (Exhibit K) show the new building exceeds three stories in height. The criterion is met.

D. Must be located within one of the following areas:

1. Core Area Tax Increment Finance (TIF) Area,
2. Areas zoned Central Business (CB),
3. High Density Residential (RH zoning) that is located adjacent to the Core Area TIF Area including properties zoned RH along NE Studio Road, between NE 4th Street and NE 5th Street from NE Webster Avenue to SE Alden Avenue, and between the alleys on either side of NE Irving Avenue from NE 4th Street to NE 8th Street, or
4. An area developed under the City’s Urban Dwelling Site Code standards as defined in Bend Development Code Section 3.8.800;

**Response:** The property is located within the Core Area Tax Increment Finance (TIF) Area. The criterion is met.

E. Include a restriction that does not allow transient oriented uses, including use by any person or group of persons entitled to occupy for rent for a period of less than 30 consecutive days (including bed and breakfast inns, hotels, motels, and short-term rentals);

**Response:** A draft deed restriction prohibiting transient oriented uses is included as Exhibit O. This criterion can be met.

F. Is in compliance with all local plans and zoning regulations applicable at the time the application is approved; and

**Response:** The Timber Yards Master Plan was approved by the Bend City Council in June 2023 (PLSPD20230065, Ord. No. NS-2476). A Site Plan Review application (City File# PLSPR20230465) for the mixed-use building on Lot 1 has been deemed complete by the City. Approval of PLSPR20230465 will demonstrate compliance with applicable local plans and zoning regulations. The criterion can be met.

G. The construction, addition or conversion is completed on or before January 1, 2032. [Ord. NS-2447, 2022]

**Response:** Construction is estimated to be completed by Fall/Winter 2026. The criterion can be met.

**12.35.020 Application for Exemption.**

The applicant shall apply to the City no later than February 1 of each calendar year, immediately preceding the first assessment year for which the exemption is requested. The applicant shall submit an application for exemption in writing on forms furnished by the City which must show:

- A. The applicant's name, address, and telephone number.
- B. A legal description of the property and the assessor's property account number for the site, and indication of site control.

**Response:** The applicant’s contact information and the assessor’s property account number for the site is provided on page 1 of this narrative. The legal description for Tax Lot 500 is provided on the deed in Exhibit A.

C. A detailed description of the project, including the number, size, and type of dwelling units; dimensions of structures, parcel size, proposed lot coverage of buildings, and amount of open space; type of construction, public and private access; parking and circulation plans; landscaping; uses; and a description of the public benefit(s) which the applicant proposes to include in the project.

**Response:** The project is a new 6-story, mixed-use building including multi-unit residential uses and retail and restaurant uses, which are permitted outright in the MU zone. Lot 1 is ±2.47 acres (±107,574 square feet) and is currently vacant. Therefore, no existing businesses or residents will be displaced. The 6-story building will contain ±246 residential units with a net rental area of ±195,747 square feet and an average unit size of 796 square feet. Types of dwelling units will range from studios to 1- and 2-bedroom apartments of varying sizes. The Preliminary Architectural Plans (Exhibit K) show ±15,973 square feet for retail sales and service and/or food and beverage services.

The Open Space and Landscape Plan (Exhibit J) shows ±13,343 square of dedicated public open space located within Tract A, which abuts Lot 1. This is the project’s primary public benefit under BC 12.35.025. The public open space constitutes ±11.0% of the ±120,927-square-foot (±2.78-acre) total area (Lot 1 area + contiguous publicly accessible open space area). The design and location of the open space satisfies Bend Park and Recreation District (BPRD) requirements, and includes an urban plaza, good solar access, ADA access, naturalized surveillance, seating areas, and planting areas, among other amenities. As stated in the BPRD Coordination Letter (Exhibit H), BPRD staff “believes the project as proposed generally aligns with the intent of the MUPTE program.”

The second public benefit is enhanced landscaping. The Open Space and Landscape Plan (Exhibit J) shows professionally designed landscaping emphasizing native, pollinator-friendly, and water wise species and design. A water budget is provided on p. 14 of Exhibit J. The landscaping will enhance the pedestrian environment and provide an attractive amenity for future residents and visitors.

The third public benefit is a wrapped parking structure. A total of ±254 parking spaces will be provided in a 2-story Type 1 podium parking structure with 4 levels of Type 5 wood frame above, including at least 40% (±96 spaces) that will be “EV ready” spaces. Secure storage for ±246 residential bicycles (1 per unit) as well as ±8 additional spaces for retail customers and employees will also be provided. The Preliminary Architectural Plans (Exhibit K) show retail and residential uses at the street level along all street frontages.

D. A description of the existing use of the property, including a justification for the elimination of existing sound housing or commercial uses on the property and what efforts or strategies the applicant has made to mitigate displacement impacts to existing businesses or residences, if the project is anticipated to displace any existing businesses or residents.

**Response:** The site is currently vacant and will not eliminate or displace any housing or commercial uses. Therefore, no mitigation is necessary.



E. A site plan and supporting materials, drawn to a minimum scale of one inch equals 20 feet, which shows in detail the development plan of the entire project, showing streets, driveways, sidewalks, pedestrian ways, off-street parking, and loading areas, location and dimension of structures, use of land and structures, major landscaping features, and design of structures.

**Response:** The Preliminary Site Plan (Exhibit B) shows streets, driveways, sidewalks and pedestrian ways. Off-street parking is detailed in the parking floor plans (Exhibit M), landscaping design and detail is provided in Exhibit J and building design/project renderings are provided in Exhibit L.

F. A letter from the City’s Private Development Engineering Division stating that the proposed use can be served by existing sewer and water services and/or has coordinated with the Division on all necessary infrastructure mitigation requirements.

**Response:** Exhibit G contains a memo from the City of Bend Engineering Division, dated December 8, 2022, which provides the anticipated sewer and water mitigation requirements for the project.

G. A description and the monetary value of any other public assistance, including, but not limited to, grants, loans, loan guarantees, rent subsidies, fee waivers, or other tax incentives, which the property is receiving or which the applicant plans to seek.

**Response:** An application for the Core Area Development Assistance Program (CADAP) was submitted to the City of Bend on October 13, 2023. The project is not seeking any other public assistance at this time.

H. A proforma that demonstrates that the proposed project including the public benefits associated with the proposed project could not financially be built “but for” the tax exemption and that absent the exemption, the project would not be financially viable. The proforma will be reviewed by a City-selected independent financial consultant.

**Response:** Exhibit C contains two proformas, one with the MUPTE applied and the other without.

I. At the time the application is submitted, applicants shall pay an application fee as prescribed by resolution of the Council. The City shall pay the County Assessor for each application which is an approved amount provided for in the resolution. [Ord. NS-2447, 2022]

**Response:** Application fees will be paid at time of submittal.

12.35.025 Public Benefits.

In order to qualify for the exemption provided by this chapter, the applicant must propose, and agree to include in the proposed project, three or more of the following public benefits. At least one of these public benefits must be selected from BC 12.35.030(A) through (E).

(\*\*\*) [Ellipses notes intentional omission of additional text.]

D. *Open Space and Publicly Accessible Park or Plaza Space.* Dedicate more than 10 percent of the site area as publicly accessible open space, park or plaza with usable amenities. To meet this criterion, the applicant must submit a letter from the Bend Park and Recreation District (District) stating that the applicant has coordinated with the District on the proposed open space or publicly accessible park and demonstrate how the applicant considered the comments of the District.

(\*\*\*)

**Response:** The Open Space and Landscape Plan (Exhibit J) shows ±13,343 square feet (±11.6% of the total site area) of dedicated public open space. This is the project’s primary public benefit

under BC 12.35.025. The design and location of the open space satisfies Bend Park and Recreation District (BPRD) requirements, and includes an urban plaza, good solar access, ADA access, naturalized surveillance, seating areas, and planting areas. Exhibit H is a letter from the BPRD, confirming coordination with the applicant. The applicant has considered the comments provided by BPRD and responds as follows:

- Plaza Size: The Lot 1 landscape architecture team has coordinated and will continue to coordinate with the landscape architects designing the portion of plaza abutting Lot 2. The intent is for the final developed landscape to read as one cohesive design between both parcels, both in layout, materiality, and furnishings.
- Contiguous: There is not sufficient area for a 20-foot-wide contiguous open space along the southern building façade due to the space needed for vehicular circulation and drop-off between Lot 1 and Lot 2. Nonetheless, a 10-foot-wide public access easement is planned to be provided to ensure pedestrian connectivity across the southern edge of the project, even though that area is not wide enough to count towards the total open space area.
- Differentiation of Private and Public Space: Paving design and materials are being coordinated with the Lot 2 landscape architecture team to inform and delineate private and public space boundaries.

Additionally, a public access easement has been included as Exhibit N demonstrating the open space area is publicly accessible. The applicant notes Exhibit N is preliminary and subject to change.

**M. *Enhanced Landscaping.* Provide native, pollinator-friendly, and water-wise landscaping.**

(\*\*\*)

**Response:** The second public benefit is enhanced landscaping. The Open Space and Landscape Plan (Exhibit J) shows professionally designed landscaping emphasizing native, pollinator-friendly, and water wise species and design. A water budget is provided on p. 14 of Exhibit J. The landscaping will enhance the pedestrian environment and provide an attractive amenity for future residents and visitors.

**O. *Wrapped Parking Structures.* For projects that provide above-grade parking structures, the applicant will provide retail and residential uses on the street level for any frontage on a street with a higher-level classification than an alley.**

(\*\*\*)

**Response:** The third public benefit is a wrapped parking structure. A total of ±254 parking spaces will be provided in a 2-story Type 1 podium parking structure with 4 levels of Type 5 wood frame above, including at least 40% (±96 spaces) that will be “EV ready” spaces. Secure storage for ±246 residential bicycles (1 per unit) as well as ±8 additional spaces for retail customers and employees will also be provided. The Preliminary Architectural Plans (Exhibit K) show retail and residential uses at the street level along all street frontages.

---

**III. Conclusion**

The required findings have been made and this written narrative and accompanying documentation demonstrate that the application is consistent with the applicable provisions of the Bend Code. The evidence in the record is substantial and supports approval of the application. Therefore, the Applicant respectfully requests that the City approve the MUPTE application for Timber Yards Lot 1.

---

## Project Description

The project is a new 6-story, mixed-use building including multi-unit residential uses and retail and restaurant uses, which are permitted outright in the MU zone. Lot 1 is  $\pm 2.47$  acres ( $\pm 107,574$  square feet) and is currently vacant. Therefore, no existing businesses or residents will be displaced. The 6-story building will contain  $\pm 246$  residential units with a net rental area of  $\pm 195,747$  square feet and an average unit size of 796 square feet. Types of dwelling units will range from studios to 1- and 2-bedroom apartments of varying sizes. The Preliminary Architectural Plans (Exhibit K) show  $\pm 15,973$  square feet for retail sales and service and/or food and beverage services.

The Open Space and Landscape Plan (Exhibit J) shows  $\pm 13,343$  square of dedicated public open space located within Tract A, which abuts Lot 1. This is the project's primary public benefit under BC 12.35.025. The public open space constitutes  $\pm 11.0\%$  of the  $\pm 120,927$ -square-foot ( $\pm 2.78$ -acre) total area (Lot 1 area + contiguous publicly accessible open space area). The design and location of the open space satisfies Bend Park and Recreation District (BPRD) requirements, and includes an urban plaza, good solar access, ADA access, naturalized surveillance, seating areas, and planting areas, among other amenities. As stated in the BPRD Coordination Letter (Exhibit H), BPRD staff "believes the project as proposed generally aligns with the intent of the MUPTE program."

The second public benefit is enhanced landscaping. The Open Space and Landscape Plan (Exhibit J) shows professionally designed landscaping emphasizing native, pollinator-friendly, and water wise species and design. A water budget is provided on p. 14 of Exhibit J. The landscaping will enhance the pedestrian environment and provide an attractive amenity for future residents and visitors.

The third public benefit is a wrapped parking structure. A total of  $\pm 254$  parking spaces will be provided in a 2-story Type 1 podium parking structure with 4 levels of Type 5 wood frame above, including at least 40% ( $\pm 96$  spaces) that will be "EV ready" spaces. Secure storage for  $\pm 246$  residential bicycles (1 per unit) as well as  $\pm 8$  additional spaces for retail customers and employees will also be provided. The Preliminary Architectural Plans (Exhibit K) show retail and residential uses at the street level along all street frontages.



---

## Existing Use of Site

Tax Lot 500 (±21.8 acres) is the former location of the KorPine particleboard plant, which operated from 1966 to 2002. In January of 2017, the former KorPine particleboard building collapsed under the weight of heavy snow and has remained vacant since. Since the site is vacant, no housing or commercial uses are being eliminated.

**TIMBER YARDS - PARCEL A**

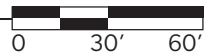
Bend, OR

Kennedy Wilson  
MUPTE  
January 8, 2024





OVERALL MASTERPLAN  
SCALE: 1" = 30'



LEGEND

- A** Entry Gateway
- B** Urban Plaza
- C** Festival Street
- D** Linear Park



OPEN SPACE MASTERPLAN  
SCALE: 1" = 30'





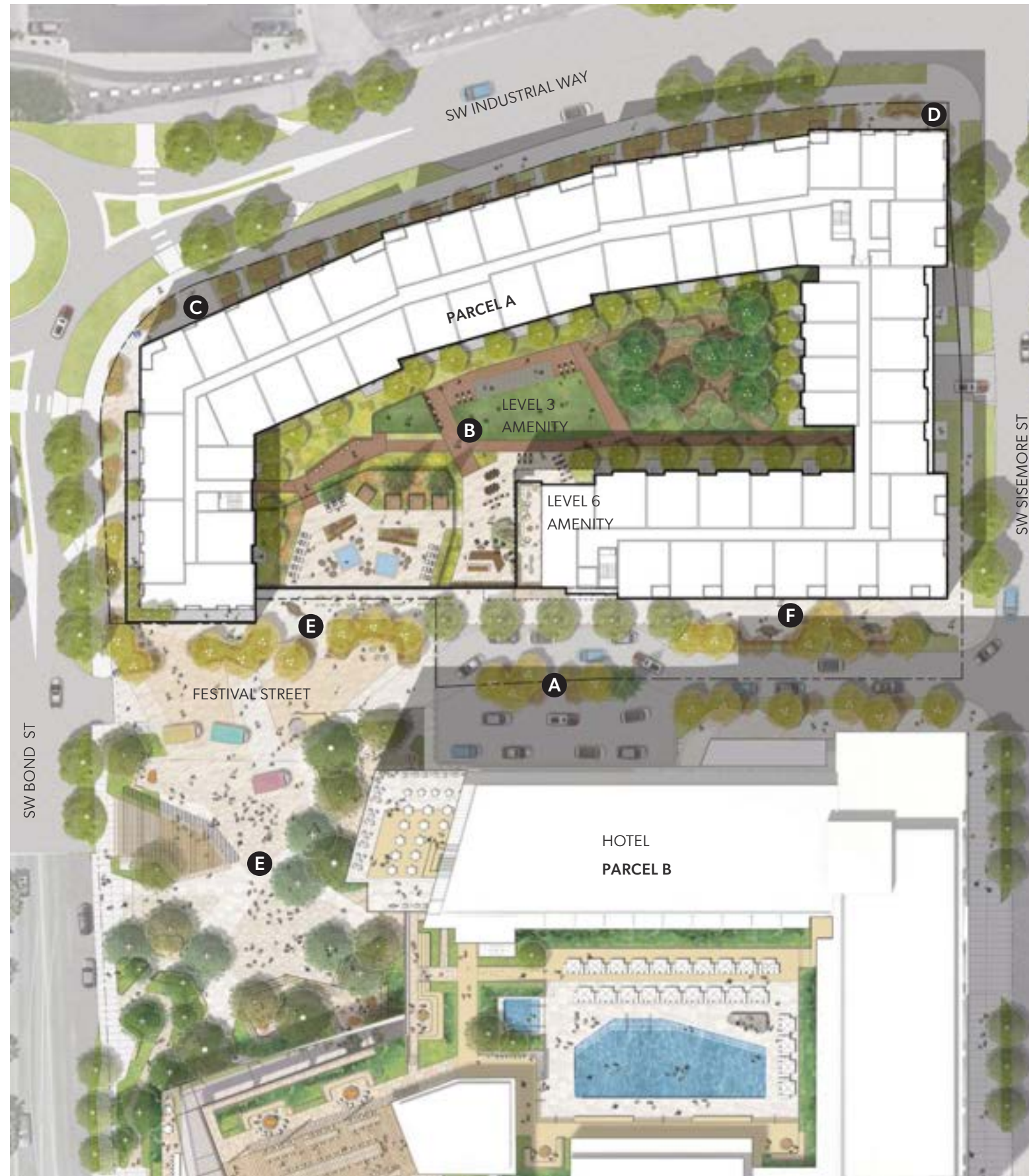
OPEN SPACE MASTERPLAN  
NTS 

**LEGEND**

- 1** Parcel A Urban Plaza
- 2** Parcel B Hotel Urban Plaza
- 3** Parcel C Linear Park
- 4** Parcel D Landscape
- 5** Parcel E Linear Park
- 6** Parcel F Landscape
- 7** Parcel G Landscape
- 8** Corner Urban Plaza

LEGEND

- A** Drop-off
- B** Private Residential Open Space
- C** West Plaza
- D** Leasing Plaza
- E** Urban Plaza
- F** Retail Plaza



OVERALL PLAN  
SCALE: NTS

**PUBLIC BENEFIT REQUIREMENTS**

To be eligible for the MUPT program, a project must incorporate a **minimum of three public benefits** as provided in BMC 12.35.025. **At least one of the benefits must be a priority public benefit**, selected from BDC 12.35.030(A) through (E).

**12.35.025.D - OPEN SPACE AND PUBLICLY ACCESSIBLE PARK OR PLAZA SPACE (PRIORITY)**

Dedicate **more than 10 percent of the site area as publicly accessible open space, park or plaza with usable amenities**. Open space used to meet this criterion does not need to be dedicated to or managed by BPRD. Having all open space, park, or plaza space in one contiguous area is preferred; **non-contiguous areas may be approved if providing sufficient public benefit, as determined by City Council**.

Publicly accessible is defined as **land available for public use for the purpose of providing places for recreation, conservation, or other open space uses** and must be dedicated either to Bend Park and Recreation District, or as a public access easement in perpetuity. The entity receiving the dedication must approve and accept the dedication. Maintenance agreements may be required.

**EVALUATION CRITERIA**

- More than 10% of site area is dedicated to BPRD (if acceptable to BPRD) or in a public access easement
- Dedicated area is located in one continuous area or provides sufficient public benefit, as determined by City Council
- Incorporates usable amenities
- Application includes a letter from Bend Park and Recreation District demonstrating that the applicant has met and coordinated with BPRD. BPRD’s letter should provide an evaluation of how the Open Space, Park or Plaza space meets the intent of the program
- Any additional information from the applicant about how the applicant has addressed BPRD’s comments

**12.35.025.M - ENHANCED LANDSCAPING**

Provide **native, pollinator-friendly, and water-wise** landscaping.

The project must meet landscaping requirements as defined in **Chapter 12 of the Bend Standards and Specifications, for all on-site landscaping. Applicant must maintain landscaping and stay within approved landscaping water budget for the ten-year period of the exemption**. Applicant must have a licensed landscape industry professional (ie. landscape architect, irrigation designers, etc) prepare a water budget for the project. The City will monitor water use throughout the 10-year exemption period. The site can’t exceed 20% above the approved water budget for the site during the period of the exemption, or the exemption may be subject to termination.

**EVALUATION CRITERIA**

- All landscaping proposed on site is in compliance with Chapter 12 of the Bend Standards and Specifications and should include native, pollinator-friendly and waterwise landscaping best practices
- Submit water budget prepared by a licensed landscape industry professional. If needed, this item can be submitted following approval but must be submitted and approved before exemption is applied.

**BPRD DESIGN GUIDELINES FOR MUPT**

**GENERAL DESIGN REQUIREMENTS**

- An unobstructed portion of a lot, with minimum dimensions of **no less than 20 feet in each direction**
- Slope not greater than five-percent unless specific design elements like an amphitheater require a more significant slope.
- Contiguous property unless site size, site constraints or another factor rendering this infeasible.

**GENERAL DESIGN REQUIREMENTS (CONT.)**

- **Integrated into overall site design and centrally located for ease of access by the residential units** it is designed to serve, **as well as the general public.**
- **Usable open space can take the form of an urban plaza**, urban garden, a view or sun terrace, urban playground, roof garden or similar.
- **Space can be located at ground level**, within an enclosed space or at the roof level.
- Design shall minimize wind tunneling and **ensure solar access** to the maximum extent practicable.
- **Space may include areas for special events that can be closed off during such events.**
- All site elements including street furniture, pathways, etc. will **meet ADA requirements.**
- The area will not
  - o Be a widened sidewalk
  - o Include areas for private dining, private recreation, display or non-publicly accessible uses.
  - o Include garage entrances, driveways (except those providing controlled access for maintenance or events), parking spaces, loading berths, exhaust vents, mechanical equipment, building trash storage facilities, or similar

**SAFE AND WELCOMING DESIGN REQUIREMENTS**

- Pedestrian level lighting in all accessible locations to **create a safe environment.**
- **Naturalized surveillance** – is visible from the street or other activated space
- Public Space Signage – The provision of **clear, visible, and readable signage will be provided to identify the area as public open space**, and to identify hours of access and those responsible for the upkeep and maintenance of the space.

**REQUIRED AMENITIES**

- Trash cans
- Seating and benches – including a minimum of **20-percent movable site furniture** for public open space on private properties.
- Trees and landscaping - Area will be landscaped and developed for active or **passive recreation** and leisure use. Certain open spaces such as plazas or playgrounds will have less landscaping, but a **minimum of 20% of the public open space will be planted areas** (excluding tree canopy). This will take the form of planting beds, groundcover, raised beds, boxed trees or accessible lawns. Mature trees will be preserved to the maximum extent practicable.
- **Bike racks** in compliance or exceeding City of Bend bike parking requirements

**ADDITIONAL AMENITIES TO CONSIDER**

- Water fountains
- Dog friendly facilities
- **Public art**
- Splash pads
- Greenways/trails
- Community garden
- Restrooms
- **Area for pop-up events, maker’s markets, festivals, farmer’s markets, etc.**

**SITE CONNECTIVITY AND CIRCULATION**

- Space will support, not inhibit connectivity – circulation paths will provide for **unobstructed pedestrian circulation throughout the public open space area.**
- While paths are not required to be straight and direct, they must be **continuous and navigable, and provide access to all features of the site.**

**PUBLIC BENEFIT QUALIFICATION CHECKLIST**

- ✔ More than 10% of site area is dedicated to BPRD (if acceptable to BPRD) or in a public access easement
- ✔ Dedicated area is located in one continuous area or provides sufficient public benefit, as determined by City Council
- ✔ Incorporates usable amenities
- ✔ Application includes a letter from Bend Park and Recreation District demonstrating that the applicant has met and coordinated with BPRD. BPRD’s letter should provide an evaluation of how the Open Space, Park or Plaza space meets the intent of the program
- ✔ Any additional information from the applicant about how the applicant has addressed BPRD’s comments
- ✔ All landscaping proposed on site is in compliance with Chapter 12 of the Bend Standards and Specifications and should include native, pollinator-friendly and waterwise landscaping best practices
- ✔ Submit water budget prepared by a licensed landscape industry professional. If needed, this item can be submitted following approval but must be submitted and approved before exemption is applied.

**BPRD DESIGN GUIDELINES FOR MUPTTE CHECKLIST**

- ✔ An unobstructed portion of a lot, with minimum dimensions of no less than 20 feet in each direction
- ✔ Slope not greater than five-percent unless specific design elements like an amphitheater require a more significant slope.
- ✔ Contiguous property unless site size, site constraints or another factor rendering this infeasible.
- ✔ Integrated into overall site design and centrally located for ease of access by the residential units it is designed to serve, as well as the general public.
- ✔ Usable open space can take the form of an urban plaza
- ✔ Space can be located at ground level
- ✔ Space may include areas for special events that can be closed off during such events.
- ✔ All site elements including street furniture, pathways, etc. will meet ADA requirements
- ✔ Pedestrian level lighting in all accessible locations
- ✔ Naturalized surveillance
- ✔ Public Space Signage
- ✔ Trash cans
- ✔ Seating and benches – including a minimum of 20-percent movable site furniture for public open space on private properties.
- ✔ Trees and landscaping - a minimum of 20% of the public open space will be planted areas
- ✔ Public art
- ✔ Area for pop-up events, maker’s markets, festivals, farmer’s markets, etc.
- ✔ Space will support connectivity
- ✔ Paths are continuous and navigable, and provide access to all features of the site.

### 12.35.025.D - PUBLIC BENEFITS

Dedicate more than 10 percent of the site area as publicly accessible open space, park or plaza with usable amenities.

### CALCULATIONS

TOTAL SITE AREA = 120,917 SF  
>10% OPEN SPACE REQUIRED

DEDICATED OPEN SPACE = 13,343 SF

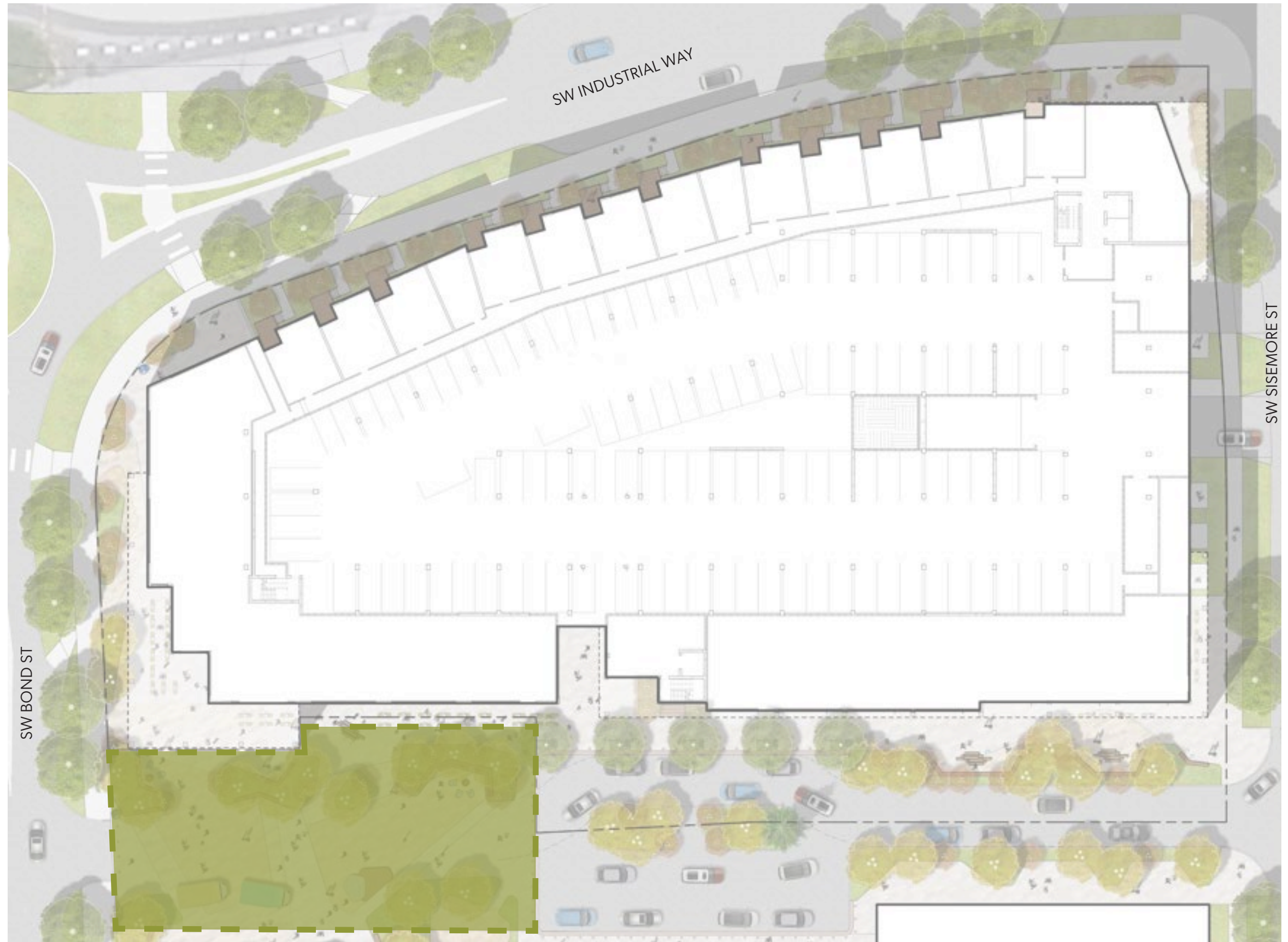
$13,343 / 120,927 = .110$

11.0% DEDICATED OPEN SPACE PROVIDED

### LEGEND

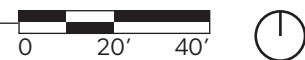


Dedicated Open Space



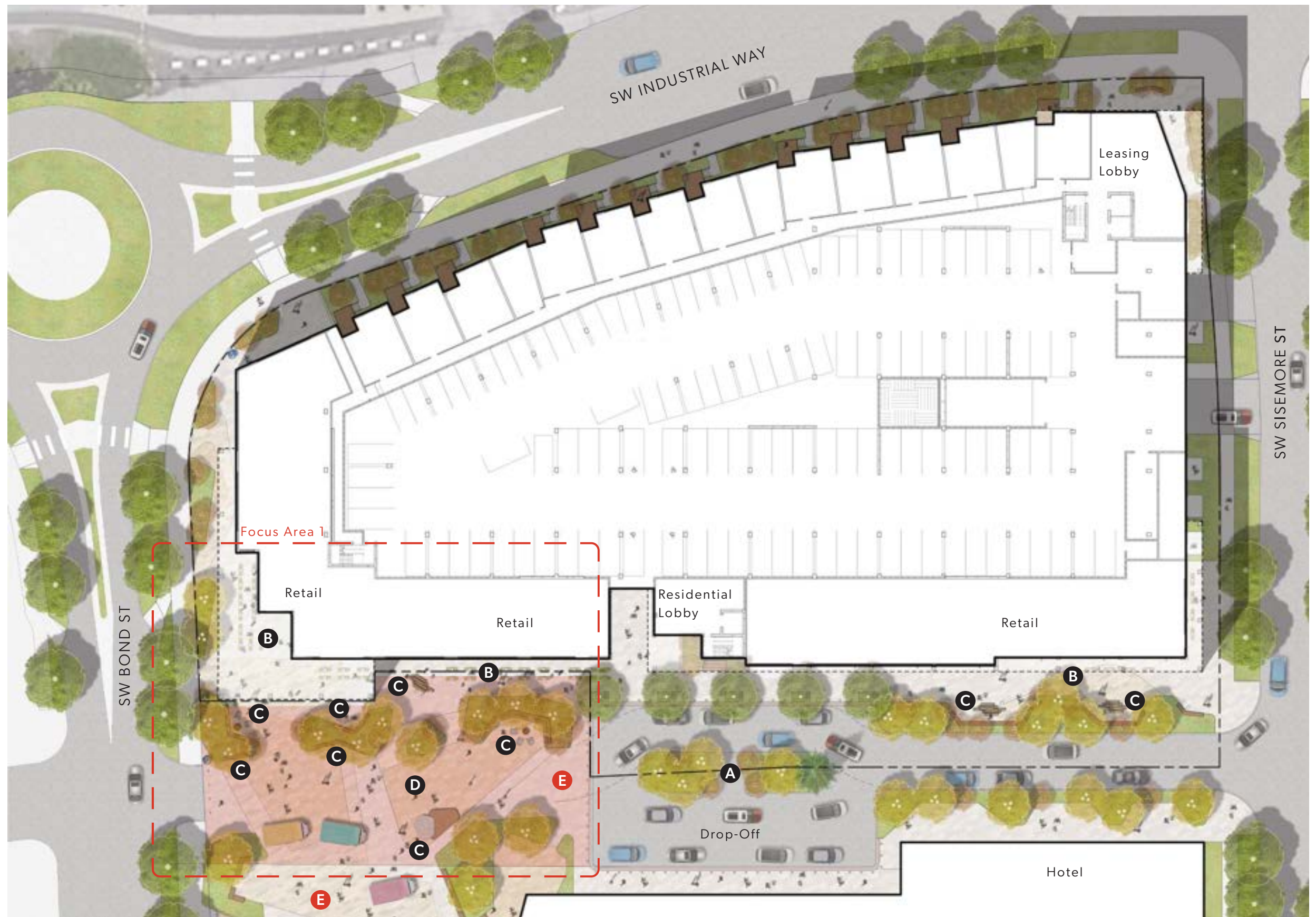
OPEN SPACE PLAN

SCALE: 1" = 20'



**LEGEND**

- A** Drop-off
- B** Retail Spill out
- C** Seating Areas
- D** Festival Street
- E** Urban Plaza



LAYOUT PLAN

SCALE: 1" = 20'



**LEGEND**

- ① Pedestrian Lighting
- ② Public Signage
- ③ Trash Cans
- ④ Fixed Seating (Seatwalls Integrated w/ Planters)
- ⑤ Movable Tables & Chairs (1 LF Provided for every 5 LF of Fixed Seating, 20% of Total)
- ⑥ Bike Racks
- ⑦ Trees & Landscaping
- ⑧ Public Art



MUPTE URBAN PLAZA - WEST

SCALE: 1/16" = 1'





1 Pedestrian Lighting



2 Public Signage



3 Trash Cans



4 Fixed Seating (Seatwalls Integrated w/ Planters)



5 Movable Tables & Chairs



6 Bike Racks



7 Trees & Landscaping



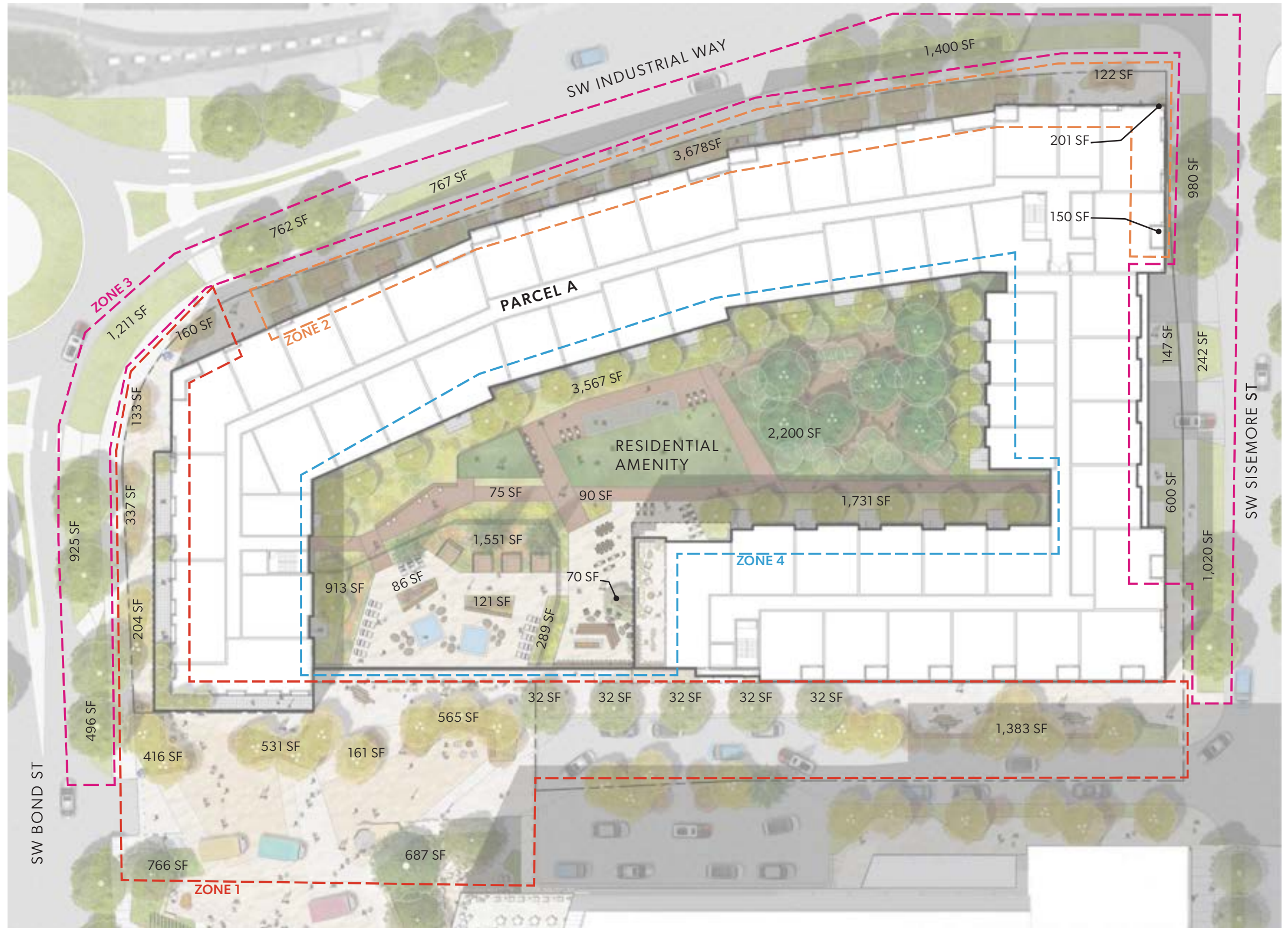
8 Public Art



**12.35.025.M - ENHANCED LANDSCAPING**

Provide **native, pollinator-friendly, and water-wise** landscaping.

Applicant must have a licensed landscape industry professional (ie. landscape architect, irrigation designers, etc) prepare a water budget for the project.



OVERALL LANDSCAPE PLAN  
SCALE: 1" = 20'

**12.35.025.M - ENHANCED LANDSCAPING**

Water budget worksheet prepared by Mark Sindell, GGLO, license #652.

**Water Budget Worksheet**

<b>Site Name:</b>	Timber Yards - Parcel A
<b>Site Address:</b>	175 SW Industrial Way, Bend, OR 97702
<b>License Number #:</b>	652

Hydrozone	Landscape type	Crop Coefficient Kc	Area/sqft	Irrigation type	Efficiency	Estimated Annual water use zone (gal/year)
1	low	0.3	5,503	Drip	0.9	34,284
2	low	0.3	4151	Rotor	0.7	33,250
3	low	0.3	8550	Rotor	0.7	68,486
4	low	0.3	9142	Drip	0.9	56,955

<b>Avg Bend ETos (in/year)</b>
30

<b>Total estimated annual water use (gal/year)</b>
192,973



ASPEN WOODLAND PLANT SPECIES | ZONE 1



Quaking Aspen | *Populus tremuloides*



Serviceberry | *Amelanchier alnifolia*



Chokecherry | *Prunus virginiana*



Woods Rose | *Rosa woodsii*



Alpine Currant | *Ribes alpinum*



Pacific Ninebark | *Physocarpus capitatus*



Prairie Dropseed | *Sporobolus heterolepis*



Little Bluestem | *Schizachyrium scoparium*



Tufted Hairgrass | *Deschampsia cespitosa*

ICON LEGEND



Native / Adaptive



Water-wise



Pollinator



Idaho Fescue | *Festuca idahoensis* 'Siskiyou Blue'



Russell Lupine | *Lupinus* 'Russell Hybrids'



Common Camas | *Camassia quamash*



RIPARIAN PLANT SPECIES | ZONE 2



Oregon Ash | *Fraxinus latifolia*



Woods Rose | *Rosa woodsii*



Pacific Ninebark | *Physocarpus capitatus*



Common Rush | *Juncus effusus*



Cascara | *Rhamnus purshiana*



Douglas Spirea | *Spiraea douglasii*



Snowberry | *Symphoricarpos albus*



Slough Sedge | *Carex obnupta*



Chokecherry | *Prunus virginiana*



Red Osier Dogwood | *Cornus stolonifera*




Tufted Hairgrass | *Deschampsia cespitosa*



Berkeley Sedge | *Carex tumulicola*

ICON LEGEND

-  Native / Adaptive
-  Water-wise
-  Pollinator



MOUNTAIN PLANT SPECIES | ZONE 3



ICON LEGEND





Western Juniper | *Juniperus occidentalis*



Munro's Globemallow | *Sphaeralcea munroana*



Coyote Sand Willow | *Salix exigua*



Pawnee Buttes Sand Cherry | *Prunus besseyi*



Rabbitbrush | *Ericameria nauseosa*



Serviceberry | *Amelanchier x grandiflora* 'Autumn Brilliance'

HIGH DESERT PLANT SPECIES | ZONE 4



Buffalo Berry | *Shepherdia* spp.



Idaho Fescue | *Festuca idahoensis* 'Siskiyou Blue'



Little Bluestem | *Schizachyrium scoparium*

ICON LEGEND



Native / Adaptive



Water-wise



Pollinator



Rocky Mountain Penstemon | *Penstemon strictus*



Mugo Pine | *Pinus mugo* 'Pumilo'



Hidicote Blue Lavender | *Lavandula angustifolia*



CITY OF BEND

November 17, 2023

**LOCATION**

710 NW Wall Street  
Downtown Bend

**MAILING ADDRESS**

PO Box 431  
Bend, OR 97709

**PHONE**

(541) 388-5505  
Relay Users Dial 7-1-1

**FAX**

(541) 385-6676

**WEB**

bendoregon.gov

**MAYOR**

Melanie Kebler

**MAYOR PRO-TEM**

Megan Perkins

**CITY COUNCILORS**

Anthony Broadman  
Barb Campbell  
Ariel Mendez  
Mike Riley

**CITY MANAGER**

Eric King

Kennedy Wilson  
151 S El Camino Drive  
Beverly Hills, CA 90212

A letter from the City of Bend Private Development Engineering Department has been requested from the Timber Yards Development Team to complete an application for a Multiple Unit Property Tax Exemption, MUPTe, application. The requirement for MUPTe is to provide information that the proposed development can be served by water and sewer services, Bend Code 12.35.020(f).

The Timberyards development group proposes to construct a development that includes multi-family residential dwellings with unknown retail uses. Necessary mitigations include 1) construction of water main to service the new uses, looping the existing water system mains within and along the site perimeter to achieve fire flow and 2) the construction of a regional sewer lift station and sewer force main with all applicable gravity sewer main to service each proposed use. The sewer lift station is required to avoid sewer discharge to the existing Old Mill sewer lift station and/or the Drake sewer lift station, discharging to the existing 2<sup>nd</sup> Street gravity sewer main. Mitigations are documented under permit number PRSWA202206668 with further clarification in the land division land use application PLLD20230464 currently being reviewed by the City.

Sincerely,

  
Digitally signed by Chris Henningsen  
DN: E=chenningsen@bendoregon.gov,  
CN=Chris Henningsen, OU=Users,  
OU=Community Development, OU=Bend,  
DC=d, DC=bend, DC=or, DC=us  
Date: 2023.11.17 07:57:02-08'00'

Principal Engineer  
Private Development Engineering  
chenningsen@bendoregon.gov



**Accommodation Information for People with Disabilities**

To obtain this information in an alternate format such as Braille, large print, electronic formats, etc. please contact Chris Henningsen at chenningsen@bendoregon.gov or [telephone # (541)388-5571; Relay Users Dial 7-1-1.



September 8, 2023

AKS Engineering  
Joey Shearer, Principal  
2777 NW Lolo Drive, Ste. 150  
Bend, OR 97703

SUBJECT: Timber Yards Multiple Unit Property Tax Exemption (MUPTe) Coordination Letter

Dear Mr. Shearer,

Thank you for taking the time to meet with us on July 26, 2023 to discuss the Timber Yards project, and the applicant’s desire to pursue the MUPTe program. The MUPTe program requires that projects provide three public benefits, and the applicant has elected to pursue the “open space and publicly accessible park or plaza space” public benefit, which requires a Bend Park and Recreation District (district) coordination letter be submitted with the MUPTe application. This document serves as your coordination letter for that application.

As we discussed on July 26, 2023, district staff believes that the project as proposed generally aligns with the intent of the MUPTe program. We appreciate the applicant’s openness to providing a privately owned, publicly accessible plaza as part of their project, and believe this will help improve the parks and open space level of service in this area of town. The design and experience are well thought out, and once constructed, we anticipate the space will be welcoming for residents and visitors alike. District staff offers the following suggestions for how the proposal could be further strengthened in order to maximize public benefit:

- **Plaza Size:** The plaza on parcel A as designed does generally meeting the MUPTe program requirement of providing a minimum of 10-percent publicly accessible open space. The plaza’s connection to the larger plaza on parcel B (the hotel plaza), further strengthens this community amenity by significantly increasing the plaza area available for public enjoyment. It’s our understanding that the plaza on parcel A will have a Public Access Easement (PAE) to ensure public access in perpetuity. District staff encourages the applicant to consider extending that PAE over the hotel plaza area to increase the size of this valuable community amenity and ensure its availability to the public.
- **Contiguous:** As illustrated on the project plans dated July 26, 2023, the public plaza areas are not contiguous, but connected via a “open space connector pathway.” The [MUPTe Tax Exemption Guidelines](#) (Guidelines) do allow for non-contiguous areas to meet the open space



District Office | Don Horton, Executive Director  
799 SW Columbia St., Bend, Oregon 97702 | [www.bendparksandrec.org](http://www.bendparksandrec.org) | (541) 389-7275



requirements, “if providing sufficient public benefit, as determined by the City Council.” As noted in the MUPTe Tax Exemption Guidelines, contiguous open space is desired “unless the site size, site constraints, or another factor rendering this infeasible.” We encourage the applicant to consider if an alternative open space configuration would facilitate the provision of contiguous open space as envisioned by the Guidelines and as specified in the district [Development Standards](#) (Standards). Provision of contiguous open space would better align with the Guidelines and Standards, and provide an improved public amenity.

- **Differentiation of Private and Public Space:** The separated public plazas are immediately adjacent to private outdoor dining areas and storefront exterior space. District staff suggests that the applicant consider different surface treatments/materials or similar on the private areas and public open space areas to ensure the availability of the public plaza for the general public at all times. This delineation will help demarcate the space, and ensure things like private dining tables and similar are not placed within the public space.

The district’s board is currently reviewing MUPTe projects on a case-by-case basis, but considering a board action to approve MUPTe applications with conditions. Once your application has been deemed complete by the City, district staff will work with you and the City to confirm a board review date, if required. If you have any questions regarding these comments, please don’t hesitate to contact me at 541-706-6192, or [rachelc@bendparksandrec.org](mailto:rachelc@bendparksandrec.org)

Sincerely,

*Rachel M Colton*

Rachel Colton  
Park Planner  
Bend Park and Recreation District



**From:** Rachel Colton <RachelC@bendparksandrec.org>  
**Sent:** Friday, January 12, 2024 2:20 PM  
**To:** Joey Shearer <shearerj@aks-eng.com>; Allison Platt <aplatt@bendoregon.gov>  
**Cc:** DevMupte <mupte@bendoregon.gov>  
**Subject:** RE: Timber Yards MUPTE - Updated Materials

Thanks Joey – glad to hear you all are planning a differentiation between the private and public realm. Have a great weekend!

**Rachel Colton (she | her), Park Planner**  
Direct: (541) 706-6192/ Mobile: (805) 448-6423 / Office: (541) 389-7275  
Email: [rachelc@bendparksandrec.org](mailto:rachelc@bendparksandrec.org)  
**Bend Park & Recreation District Office**, 799 SW Columbia St., Bend, OR 97702  
<http://www.bendparksandrec.org/>



**From:** Joey Shearer <[shearerj@aks-eng.com](mailto:shearerj@aks-eng.com)>  
**Sent:** Thursday, January 11, 2024 4:27 PM  
**To:** Rachel Colton <[RachelC@bendparksandrec.org](mailto:RachelC@bendparksandrec.org)>; Allison Platt <[aplatt@bendoregon.gov](mailto:aplatt@bendoregon.gov)>  
**Cc:** DevMupte <[mupte@bendoregon.gov](mailto:mupte@bendoregon.gov)>  
**Subject:** RE: Timber Yards MUPTE - Updated Materials

Hi Rachel,

We appreciate you, Michelle, and Sara meeting with our team as we were finalizing this open space concept. As our plans show, BPRD’s comments were very much considered.

The area planned to be dedicated for open space exceeds the minimum requirements in Title 12 of the Bend Municipal Code as well as the design guidelines coordinated with BPRD, and unfortunately additional dedication would encumber adjacent land associated with a different project/property/operator. That said, it’s likely additional plaza area will be open to the public and provide a public benefit in some manner, just not in a way that meets the narrower parameters of the MUPTE program.

Regarding visual differentiation of the private and public realm, our intent is to create a visual line or pattern in hardscape that demarcates these two areas. We just don’t have that level of design detail yet.

Thank you,

**Joey Shearer, AICP – Principal**  
**AKS ENGINEERING & FORESTRY, LLC**  
P: 541.317.8429 Ext. 514 | [www.aks-eng.com](http://www.aks-eng.com) | [shearerj@aks-eng.com](mailto:shearerj@aks-eng.com)

**From:** Rachel Colton <[RachelC@bendparksandrec.org](mailto:RachelC@bendparksandrec.org)>  
**Sent:** Thursday, January 11, 2024 11:12 AM  
**To:** Allison Platt <[aplatt@bendoregon.gov](mailto:aplatt@bendoregon.gov)>  
**Cc:** Joey Shearer <[shearerj@aks-eng.com](mailto:shearerj@aks-eng.com)>; DevMupte <[mupte@bendoregon.gov](mailto:mupte@bendoregon.gov)>  
**Subject:** RE: Timber Yards MUPTe - Updated Materials

**Proceed with caution:** This email hails from an external source. Unverified emails may lead to phishing attacks or malware infiltration. Always exercise due diligence.

Hi all,

I reviewed the updated plans/project description. We very much appreciate that the applicant has updated the plans to provide for contiguous open space consistent with applicable MUPTe Tax Exemption Guidelines, and that the size of the open space has increased. Has the applicant given any further consideration to our previous comments regarding extending the PAE over the hotel plaza, and ways to visually differentiate the private realm from the public realm?

Thanks again for your responsiveness to our comments.

Best,

**Rachel Colton (she | her), Park Planner**  
Direct: (541) 706-6192/ Mobile: (805) 448-6423 / Office: (541) 389-7275  
Email: [rachelc@bendparksandrec.org](mailto:rachelc@bendparksandrec.org)  
**Bend Park & Recreation District Office**, 799 SW Columbia St., Bend, OR 97702  
<http://www.bendparksandrec.org/>



**From:** Rachel Colton  
**Sent:** Wednesday, January 10, 2024 8:46 AM  
**To:** Allison Platt <[aplatt@bendoregon.gov](mailto:aplatt@bendoregon.gov)>  
**Cc:** Joey Shearer <[shearerj@aks-eng.com](mailto:shearerj@aks-eng.com)>; DevMupte <[mupte@bendoregon.gov](mailto:mupte@bendoregon.gov)>  
**Subject:** RE: Timber Yards MUPTe - Updated Materials

Thanks Allison, I can comment to getting you any comments within the next two weeks. My goal is no later than early next week. Thanks for the opportunity to review.

**Rachel Colton (she | her), Park Planner**  
Direct: (541) 706-6192/ Mobile: (805) 448-6423 / Office: (541) 389-7275  
Email: [rachelc@bendparksandrec.org](mailto:rachelc@bendparksandrec.org)  
**Bend Park & Recreation District Office**, 799 SW Columbia St., Bend, OR 97702  
<http://www.bendparksandrec.org/>



**From:** Allison Platt <aplatt@bendoregon.gov>  
**Sent:** Tuesday, January 9, 2024 9:28 AM  
**To:** Rachel Colton <RachelC@bendparksandrec.org>  
**Cc:** Joey Shearer <shearerj@aks-eng.com>; DevMupte <mupte@bendoregon.gov>  
**Subject:** FW: Timber Yards MUPTE - Updated Materials

Hi Rachel,

I'm sending over the revised materials related to the Open Space public benefit for the Timber Yards Parcel A MUPTE application.

Please let me know if BPRD has any additional comments related to the revised materials that should be included in the application materials prior to finalizing our staff report (ie a letter addendum, etc) and estimate timeframe to expect those comments if so. We are hoping to finalize a staff report in the next two weeks.

Best,



CITY OF BEND

**Allison Platt**  
*Core Area Project Manager*  
My Pronouns: She, Her, Hers [Why Pronouns?](#)  
Office: 541-322-6394  
Mobile: 541-213-7387



I am currently working a part time schedule as I transition out of maternity leave. I am only in the office on Tuesdays and Thursdays and therefore may be delayed in responding to your email.

Learn more about the City's plans for the [Core Area](#), our [Urban Renewal/Tax Increment Financing](#) program, and our [Multiple Unit Property Tax Exemption](#) Program.

**From:** Joey Shearer <shearerj@aks-eng.com>  
**Sent:** Tuesday, January 9, 2024 9:06 AM  
**To:** Allison Platt <aplatt@bendoregon.gov>  
**Cc:** Kira Marchant <marchantk@aks-eng.com>  
**Subject:** Timber Yards MUPTE - Updated Materials

**CAUTION:** External Email. Use caution when opening attachments, clicking links, or responding to this email.

Good morning Allison,

We have uploaded the updated MUPTTE materials. The attached printout from CityView shows the updated documents clouded in red and I highlighted the old version that can be deleted/archived. Typically, with planning applications, we can upload updated versions that overwrite the old versions. I was not able to do that in the MUPTTE application, which seemed to result in these duplicates.

Let us know if you have any questions.

Thanks,

**Joey Shearer, AICP – Principal**



**AKS ENGINEERING & FORESTRY, LLC**

2777 NW Lolo Drive, Suite 150 | Bend, OR 97703

P: 541.317.8429 | [www.aks-eng.com](http://www.aks-eng.com) | [shearerj@aks-eng.com](mailto:shearerj@aks-eng.com)

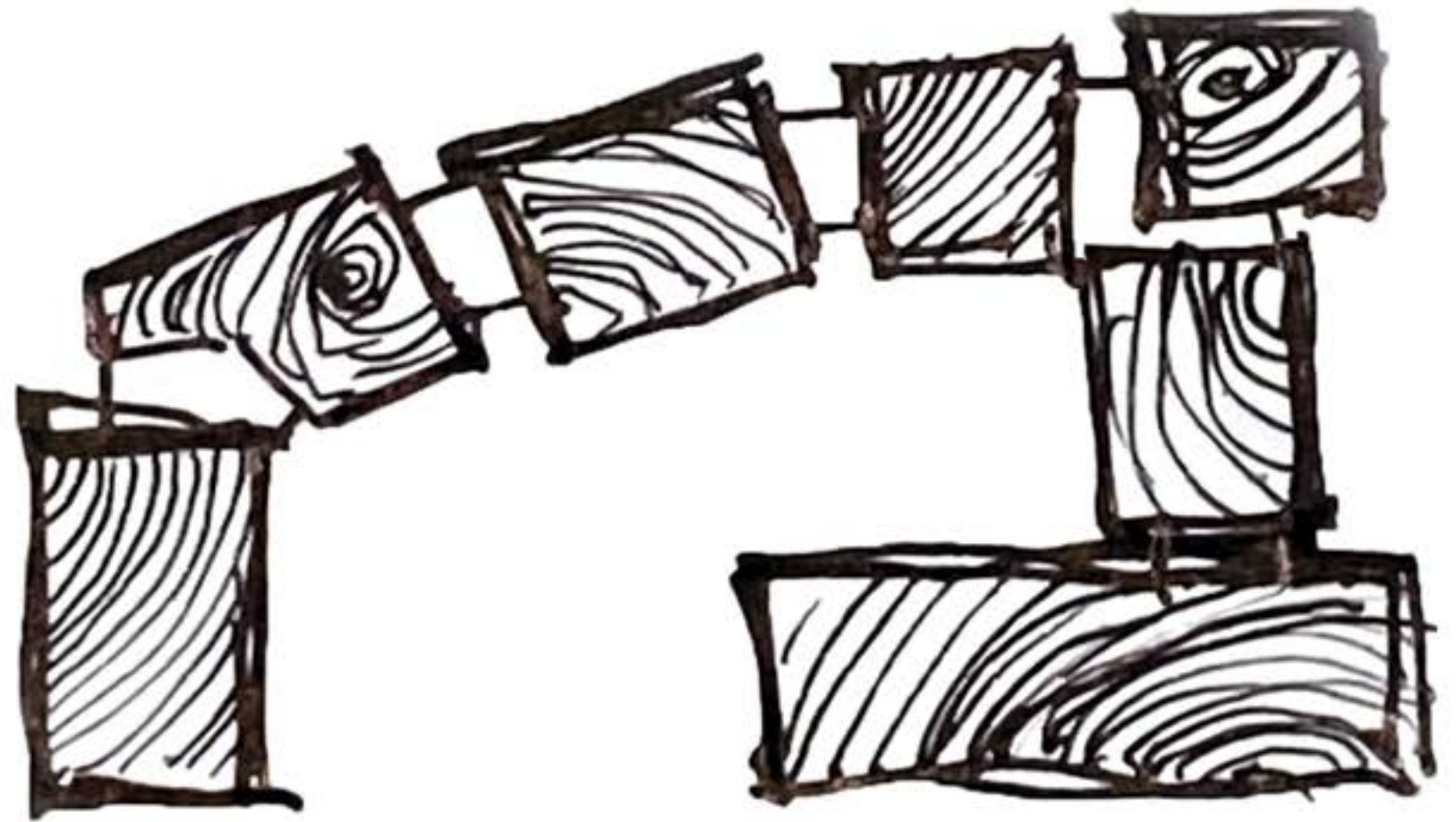
Offices in: Bend, OR | Keizer, OR | The Dalles, OR | Tualatin, OR | Kennewick, WA | Vancouver, WA | White Salmon, WA

*NOTICE: This communication may contain privileged or other confidential information. If you have received it in error, please advise the sender by reply e-mail and immediately delete the message and any attachments without copying or disclosing the contents. AKS Engineering and Forestry shall not be liable for any changes made to the electronic data transferred. Distribution of electronic data to others is prohibited without the express written consent of AKS Engineering and Forestry.*

**PUBLIC RECORDS LAW DISCLOSURE:** Emails are generally public records and therefore subject to public disclosure unless exempt from disclosure under Oregon Public Records Law. Emails can be sent inadvertently to unintended recipients and contain confidential or privileged information. If you are not the intended recipient (or authorized to receive for the recipient), please advise by return email and delete immediately without reading or forwarding to others. Thank you.

TIMBER YARDS - LOT 1  
Bend, Oregon

**GGLO**  
Kennedy Wilson  
SD Renderings Packet  
August 10, 2023





Street View Looking East Along Timber Yards Drive



North Facade Looking Southeast Along SW Industrial Way





View Looking Southwest Towards Main Residential Lobby Entrance



View Looking Northeast Across the Turnaround and Timber Yards Drive



SE Axon Looking Northwest Along Timber Yards Drive



NW Axon Looking Southeast Along SW Industrial Way

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

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



**City of Bend**  
**City Manager Administrative Policy**

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

**City of Bend**  
**City Manager Administrative Policy**

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

**City of Bend**  
**City Manager Administrative Policy**

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





**City of Bend  
City Manager Administrative Policy**

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

<b>PRIORITY PUBLIC BENEFIT &amp; SUBMITTAL ITEM</b>	<b>APPLICATION EVALUATION CRITERIA</b>	<b>REPORTING REQUIREMENTS</b>
<input data-bbox="37 776 86 824" type="checkbox"/> <p>AFFORDABLE HOUSING- LETTER FROM CITY OF BEND HOUSING DEPARTMENT</p>	<ul style="list-style-type: none"> <li>• 10% of units are deed restricted as Affordable Housing for the length of the exemption.                             <ul style="list-style-type: none"> <li>○ 60% Area Median Income for rental units</li> <li>○ 80% Area Median Income for sale units</li> </ul> </li> <li>• Appropriate rental rates must be shown in the project proformas submitted as part of the application</li> <li>• For the purpose of calculating unit requirements, fractional units are rounded up to the next whole unit (e.g.. if providing less than 10 units, at least 1 unit must be Affordable)</li> </ul> <p>Letter from City of Bend Housing Department</p>	<ul style="list-style-type: none"> <li>• Applicant will be required to provide proof of a deed restriction that restricts income levels for 10% of the units prior to exemption being applied</li> </ul> <p>Annual reporting on initial tenants and any new tenants' certification of household income qualifications</p>
<input data-bbox="37 1222 86 1271" type="checkbox"/> <p>MIDDLE INCOME HOUSING- LETTER FROM CITY OF BEND HOUSING DEPARTMENT</p>	<ul style="list-style-type: none"> <li>• 30% of units are deed restricted as Middle Income (120% Area Median Income) housing for the length of the exemption</li> <li>• Appropriate rental rates must also be shown in the project proformas submitted as part of the application</li> <li>• For the purpose of calculating unit requirements, fractional units are rounded up to the next whole unit</li> <li>• Letter from City of Bend Housing Department</li> </ul>	<ul style="list-style-type: none"> <li>• Applicant will be required to provide proof of a deed restriction that restricts income levels for 30% of the units prior to exemption being applied</li> <li>• Annual reporting on initial tenants and any new tenants' certification of household income qualifications</li> </ul>

**City of Bend**  
**City Manager Administrative Policy**

<b>PRIORITY PUBLIC BENEFIT &amp; SUBMITTAL ITEM</b>	<b>APPLICATION EVALUATION CRITERIA</b>	<b>REPORTING REQUIREMENTS</b>
<input data-bbox="42 470 88 516" type="checkbox"/> CHILDCARE FACILITIES- SITE PLAN	<ul style="list-style-type: none"> <li>• Site Plan               <ul style="list-style-type: none"> <li>○ Must demonstrate location of childcare facilities and that it meets all code requirements for those facilities</li> </ul> </li> <li>• Identify which childcare provider that the applicant plans to locate in the facility, if available, in the Project Description</li> </ul>	<ul style="list-style-type: none"> <li>• Proof of childcare license before exemption is applied</li> <li>• Annual reporting to verify childcare license</li> </ul>
<input checked="" data-bbox="42 990 88 1036" type="checkbox"/> OPEN SPACE AND PUBLICLY ACCESSIBLE PARK OR PLAZA SPACE- LETTER FROM BEND PARK AND RECREATION DISTRICT AND SITE PLAN	<ul style="list-style-type: none"> <li>• More than 10% of site area is dedicated to BPRD (if acceptable to BPRD) or in a public access easement</li> <li>• Dedicated area is located in one continuous area or provides sufficient public benefit, as determined by City Council</li> <li>• Incorporates usable amenities</li> <li>• Application includes a letter from Bend Park and Recreation District demonstrating that the applicant has met and coordinated with BPRD. BPRD's letter should provide an evaluation of how the Open Space, Park or Plaza space meets the intent of the program</li> <li>• Any additional information from the applicant about how the applicant has addressed BPRD's comments</li> </ul>	<ul style="list-style-type: none"> <li>• Land dedication or public access agreement</li> <li>• Staff verification that usable amenities are incorporated into final project before exemption is applied</li> </ul> No annual reporting requirements
ENERGY EFFICIENCY DOCUMENTATION FOR HIGH STANDARD OF ENERGY	<ul style="list-style-type: none"> <li>• Applicant must indicate which energy efficiency standard they plan to utilize to qualify for this public benefit and some form of documentation that demonstrates that they have coordinated with the certifying agency</li> </ul>	<ul style="list-style-type: none"> <li>• Submit documentation of 3<sup>rd</sup> party verification of energy efficiency standard that is met before exemption is applied</li> </ul>

**City of Bend**  
**City Manager Administrative Policy**

<b>PRIORITY PUBLIC BENEFIT &amp; SUBMITTAL ITEM</b>	<b>APPLICATION EVALUATION CRITERIA</b>	<b>REPORTING REQUIREMENTS</b>
<input data-bbox="37 410 86 456" type="checkbox"/> EFFICIENCY/GREEN BUILDING FEATURES	and are on track to meet certification requirements: <ul style="list-style-type: none"> <li>○ Energy Trust New Buildings Path to Net Zero; or</li> <li>○ LEED Platinum; or</li> <li>○ Earth Advantage Platinum or higher</li> </ul>	No annual reporting requirements

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

<b>ADDITIONAL PUBLIC BENEFITS &amp; SUBMITTAL ITEM</b>	<b>APPLICATION EVALUATION CRITERIA</b>	<b>REPORTING REQUIREMENTS</b>
<input data-bbox="37 1122 86 1167" type="checkbox"/> ENERGY EFFICIENCY DOCUMENTATION FOR ADDITIONAL ENERGY EFFICIENCY/GREEN BUILDING FEATURES	<ul style="list-style-type: none"> <li>● Applicant must indicate which energy efficiency standard they plan to utilize to qualify for this public benefit and some form of documentation that demonstrates that they have coordinated with the certifying agency and are on track to meet certification requirements:                         <ul style="list-style-type: none"> <li>○ Energy Trust of Oregon New Building Whole Building; or</li> <li>○ Energy Trust Multifamily Market Solutions Best; or</li> <li>○ Earth Advantage Silver or higher; or</li> <li>○ LEED Silver; or</li> <li>○ Solar installation that will supply some of the building’s energy using solar.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Submit documentation of 3<sup>rd</sup> party verification of energy efficiency standard that is met before exemption is applied</li> <li>● If utilizing the solar installation, submit City of Bend solar permit and coordinate with City staff to verify requirement is met before exemption is applied</li> <li>● No annual reporting requirements</li> </ul>

**City of Bend**  
**City Manager Administrative Policy**

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



**City of Bend**  
**City Manager Administrative Policy**

ADDITIONAL PUBLIC BENEFITS & SUBMITTAL ITEM	APPLICATION EVALUATION CRITERIA	REPORTING REQUIREMENTS
	<ul style="list-style-type: none"> <li>• Minimum of two site elements from the following list in a consolidated area on the site:                             <ul style="list-style-type: none"> <li>○ Pedestrian Plaza (minimum of 500 square feet)</li> <li>○ Flex mobility space (a minimum of 250 square feet)</li> <li>○ Secured bicycle lockers for a minimum of 10 bicycles</li> <li>○ Passengers pick up and drop off areas that are designed to protect pedestrians and bicyclists from vehicle conflicts. Queue areas must provide adequate capacity to prevent vehicles from blocking streets and access corridors.</li> <li>○ Pedestrian scaled lighting that serves mobility supportive amenities</li> <li>○ Accommodation of micromobility services and parking</li> <li>○ Enhanced pedestrian crossing that serves mobility supportive amenities</li> </ul> </li> </ul>	
<input data-bbox="37 1318 86 1367" type="checkbox"/> <p>GROUND FLOOR COMMERCIAL-SITE PLAN</p>	<ul style="list-style-type: none"> <li>• More than 35 percent of the ground floor is commercial uses not including accessory residential uses such as residential lobby, storage, etc</li> <li>• Commercial use ground floor calculation must be included as part of the application and be consistent with site plan</li> </ul>	<ul style="list-style-type: none"> <li>• City to verify before exemption is applied.</li> <li>• No annual reporting requirements</li> </ul>

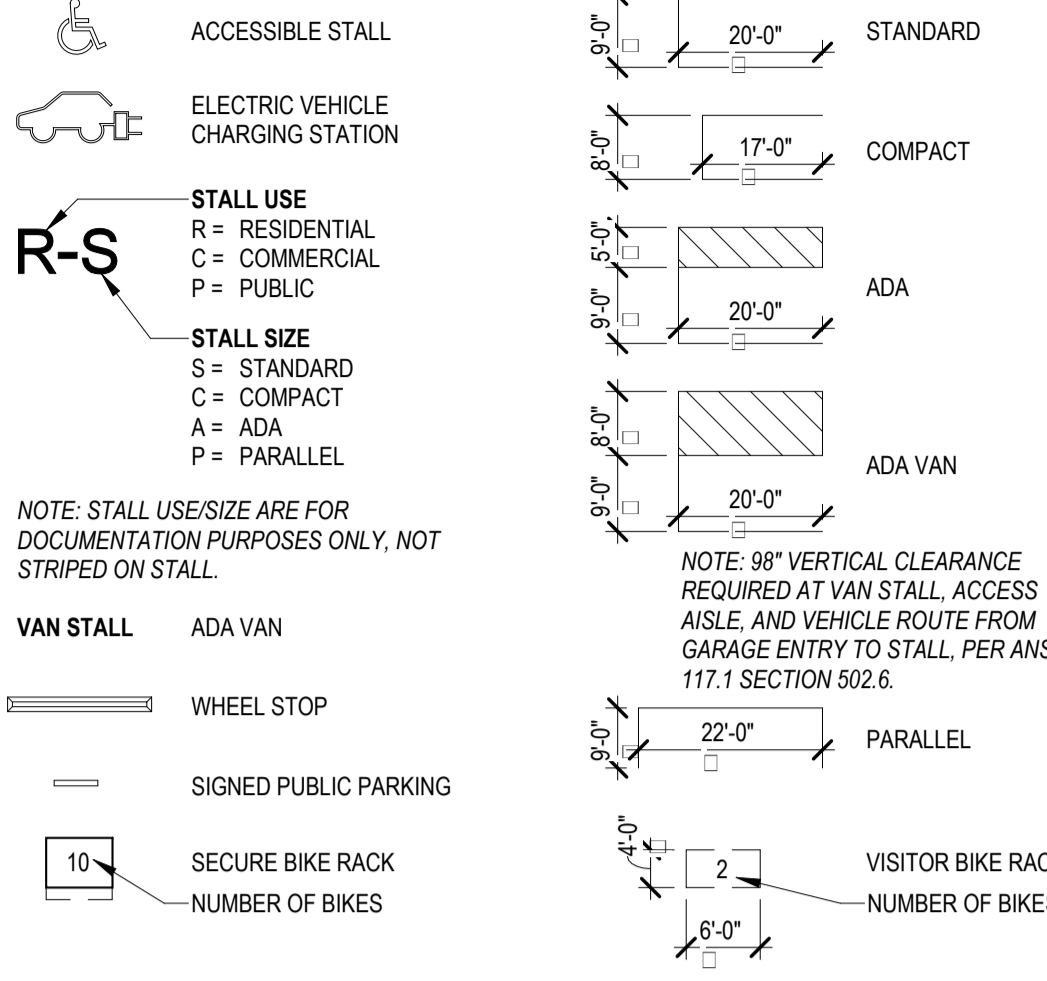
**City of Bend**  
**City Manager Administrative Policy**

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

**City of Bend  
City Manager Administrative Policy**

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

**PARKING LEGEND**



GARAGE PARKING STALLS	
TYPE	COUNT
ACCESSIBLE	5
COMMERCIAL	35
COMPACT 8'-0"	2
COMPACT PARALLEL	74
STANDARD 9'-0"	116
RESIDENTIAL	2
ACCESSIBLE	58
COMPACT PARALLEL	1
STANDARD 9'-0"	77
TOTAL PARKING STALLS	254

BIKE PARKING			
RACK TYPE	RACK COUNT	BIKE COUNT	% TOTAL
FLOOR RACK - 2	7	14	6%
FLOOR RACK - 5	6	30	12%
FLOOR RACK - 10	21	210	83%
TOTAL	34	254	

NOTE: 40% OF ALL PROVIDED PARKING SPACES TO BE PROVIDED WITH SUFFICIENT ELECTRICAL SERVICE CAPACITY, AS DEFINED IN ORS 455.417

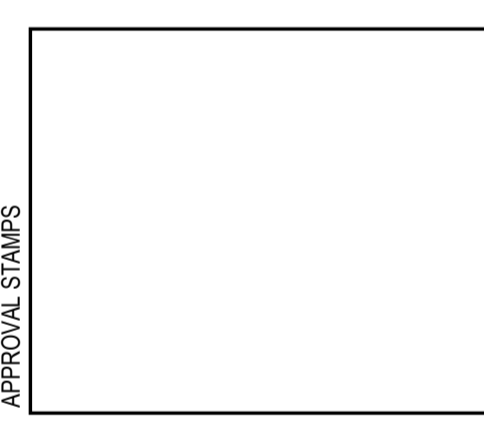
**GENERAL FLOOR PLAN NOTES**

1. PLAN DIMENSIONS ARE TO FACE OF STUD. FACE OF CONCRETE WALL, CENTERLINE OF COLUMN, OR CENTERLINE OF ROUGH OPENINGS. UON, CONTACT ARCHITECT FOR CLARIFICATIONS.
2. DOORS AND CASED OPENINGS INDICATED ADJACENT TO WALL INTERSECTIONS SHALL BE LOCATED WITH THE EDGE OF FINISH OPENINGS SIX INCHES FROM THE ADJACENT WALL AT EXTERIOR DOORS, INTERIOR COMMON AREA DOORS, AND UNIT ENTRY DOORS, AND FOUR INCHES FROM THE ADJACENT WALL AT INTERIOR DOORS OF UNITS, UON.
3. SEE SHEET A-XXX & A-XXX FOR WINDOW LEGEND AND DETAILS.
4. SEE SHEET A-XXX & A-XXX FOR DOOR SCHEDULE AND DETAILS.
5. SEE SHEET A-600 & A-601 FOR WALL ASSEMBLIES, RATINGS AND TESTING CRITERIA.
6. INSTALL BLOCKING FOR GRAB BARS IN ALL BATHROOM WALLS SURROUNDING WATER CLOSET, BATHTUB AND SHOWER, REF A-500.
7. HANDRAILS SHALL RETURN TO A WALL, GUARD OR THE WALKING SURFACE OR SHALL BE CONTINUOUS TO THE HANDRAIL OF AN ADJACENT STAIR FLIGHT OR RAMP RUN, PER IBC 1012.5.
8. CONTRACTOR SHALL INSTALL FURRING, SHIMS AND ADDITIONAL LAYERS OF GYPSUM BOARD AS NECESSARY TO ACHIEVE FLUSH FINISH WHERE SURFACES OF ADJACENT WALL OR SHAFT ASSEMBLIES ARE NOT, BUT ARE INTENDED TO BE, ALIGNED.
9. FOR GRID LAYOUT, SEE A1G-002.



PROJECT:  
**TIMBER YARDS - LOT 1**  
PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**



MARK	DATE	DESCRIPTION
<b>REVISIONS</b>		

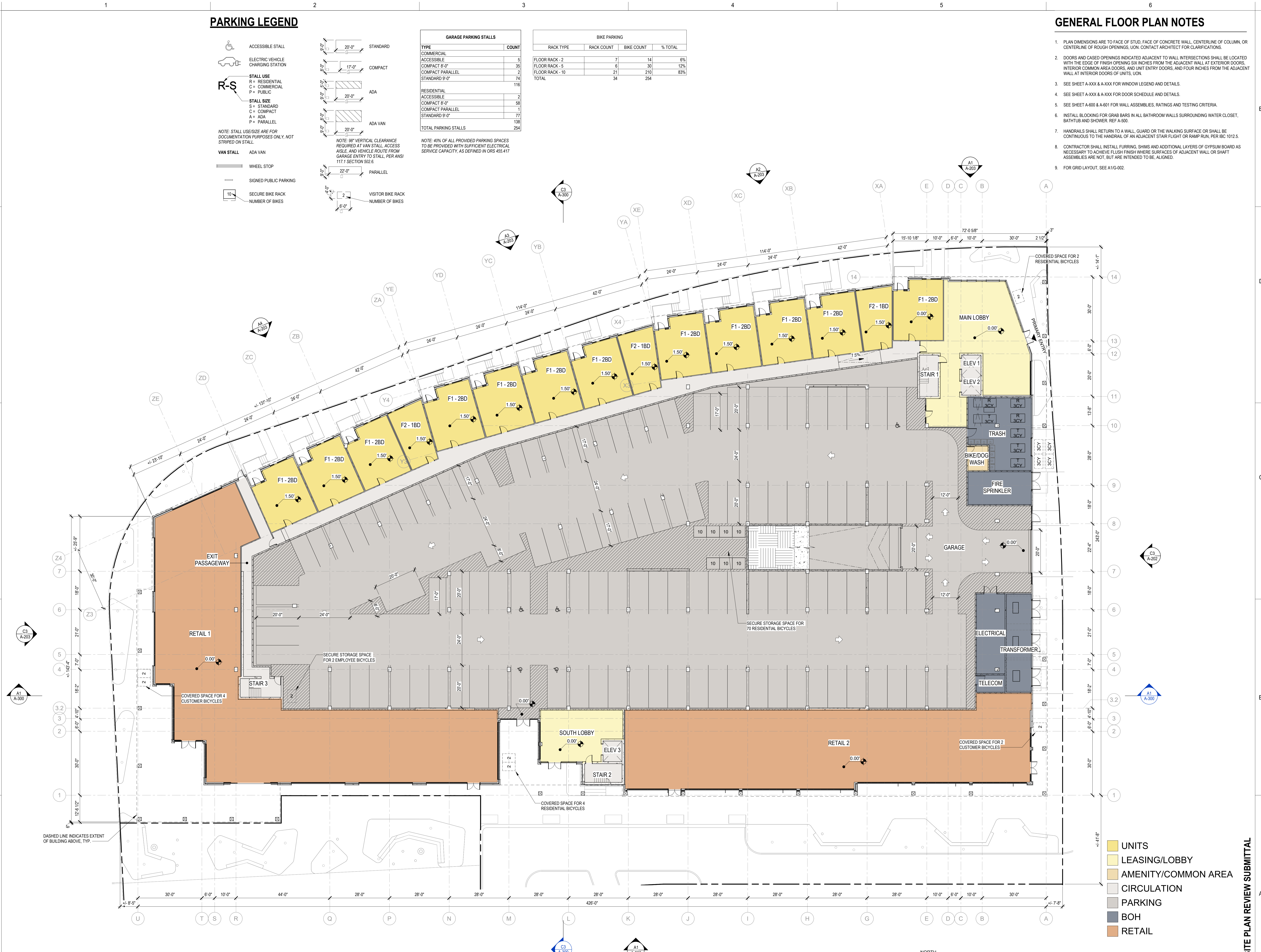
MARK	DATE	DESCRIPTION
B	08/11/2023	SCHEMATIC DESIGN SET
A	08/07/2023	SITE PLAN REVIEW SUBMITTAL

**ISSUE INFORMATION**  
PROJECT NO.: **2022119.01**  
GGLO PRINCIPAL IN CHARGE:  
GGLO PROJECT MANAGER:  
OWNER APPROVAL:

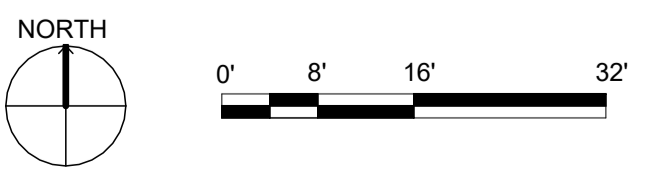
SHEET TITLE  
**OVERALL FLOOR PLAN -  
LEVEL 1**

SHEET NO.  
**A-111**

COPYRIGHT GGLO. ALL RIGHTS RESERVED.  
ORIGINAL SHEET SIZE 8 3/4" X 11"



- UNITS
- LEASING/LOBBY
- AMENITY/Common AREA
- CIRCULATION
- PARKING
- BOH
- RETAIL

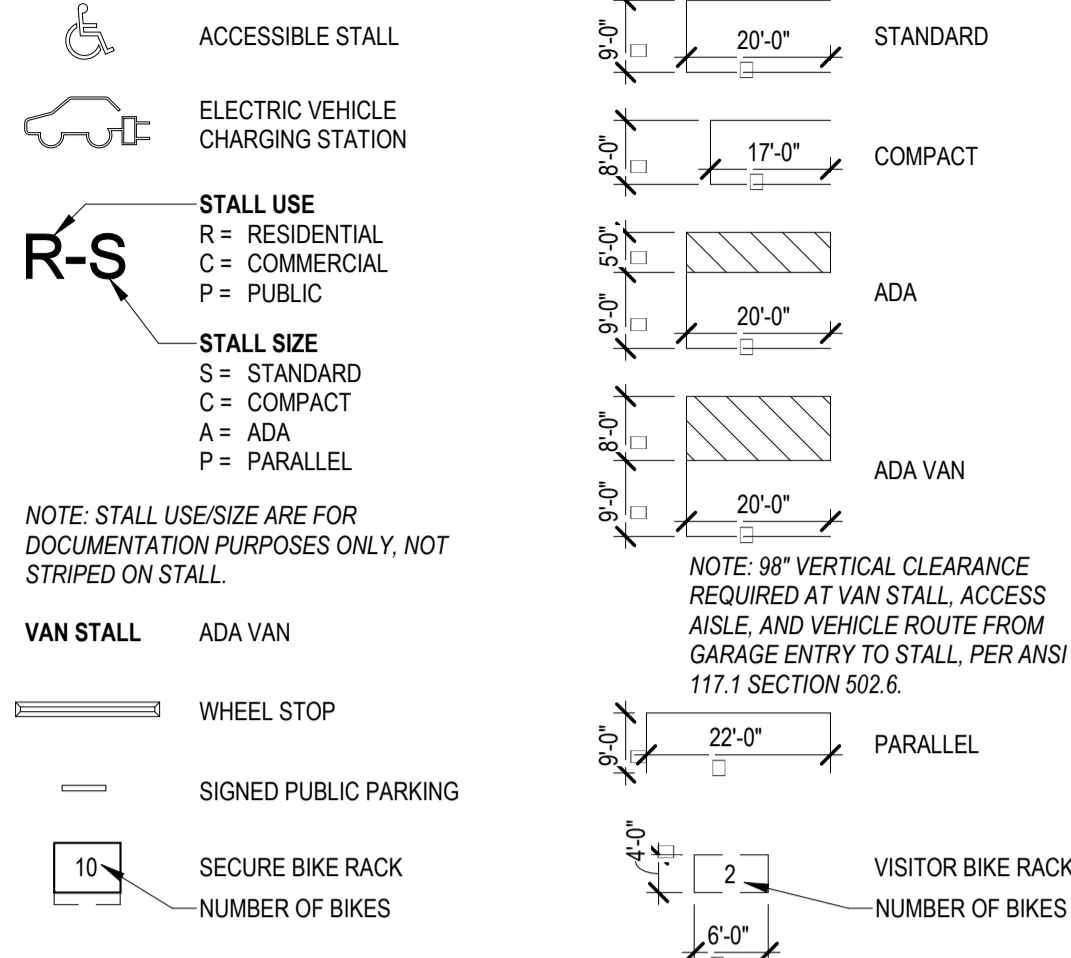


**A1 LEVEL 1 FLOOR PLAN**  
1/16" = 1'-0"

**8/7/2023 SITE PLAN REVIEW SUBMITTAL**



### PARKING LEGEND



GARAGE PARKING STALLS	
TYPE	COUNT
ACCESSIBLE	5
COMMERCIAL	35
COMPACT 8'-0"	2
COMPACT PARALLEL	74
STANDARD 9'-0"	116
RESIDENTIAL	2
ACCESSIBLE	58
COMPACT PARALLEL	1
STANDARD 9'-0"	77
TOTAL PARKING STALLS	254

BIKE PARKING			
RACK TYPE	RACK COUNT	BIKE COUNT	% TOTAL
FLOOR RACK - 2	7	14	6%
FLOOR RACK - 5	6	30	12%
FLOOR RACK - 10	21	210	83%
TOTAL	34	254	

NOTE: 40% OF ALL PROVIDED PARKING SPACES TO BE PROVIDED WITH SUFFICIENT ELECTRICAL SERVICE CAPACITY, AS DEFINED IN ORS 455.417

### GENERAL FLOOR PLAN NOTES

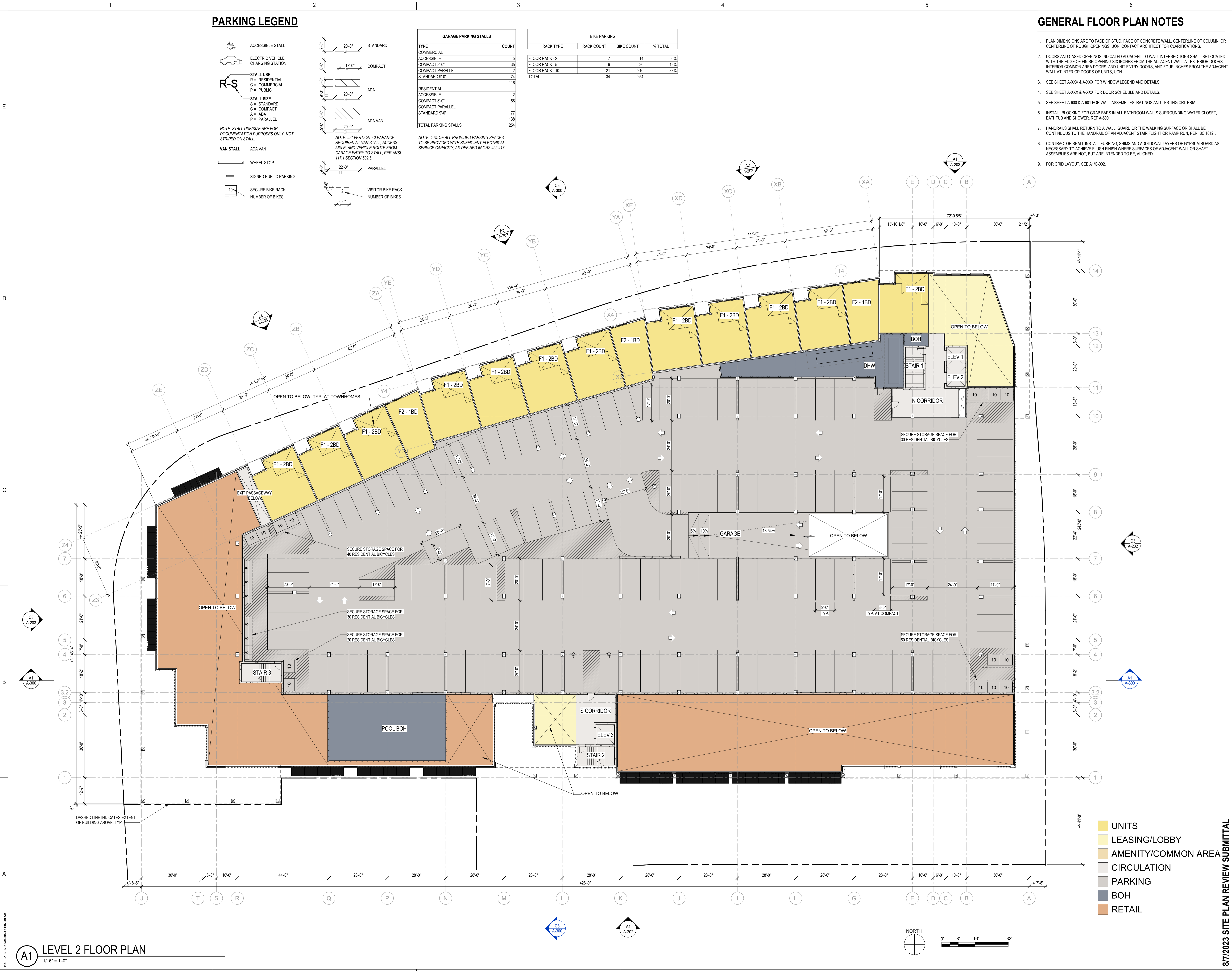
- PLAN DIMENSIONS ARE TO FACE OF STUD. FACE OF CONCRETE WALL, CENTERLINE OF COLUMN, OR CENTERLINE OF ROUGH OPENINGS. UON: CONTACT ARCHITECT FOR CLARIFICATIONS.
- DOORS AND CASED OPENINGS INDICATED ADJACENT TO WALL INTERSECTIONS SHALL BE LOCATED WITH THE EDGE OF FINISH OPENINGS SIX INCHES FROM THE ADJACENT WALL AT EXTERIOR DOORS, INTERIOR COMMON AREA DOORS, AND UNIT ENTRY DOORS, AND FOUR INCHES FROM THE ADJACENT WALL AT INTERIOR DOORS OF UNITS, UON.
- SEE SHEET A-XXX & A-XXX FOR WINDOW LEGEND AND DETAILS.
- SEE SHEET A-XXX & A-XXX FOR DOOR SCHEDULE AND DETAILS.
- SEE SHEET A-600 & A-601 FOR WALL ASSEMBLIES, RATINGS AND TESTING CRITERIA.
- INSTALL BLOCKING FOR GRAB BARS IN ALL BATHROOM WALLS SURROUNDING WATER CLOSET, BATHUB AND SHOWER, REF A-500.
- HANDRAILS SHALL RETURN TO A WALL, GUARD OR THE WALKING SURFACE OR SHALL BE CONTINUOUS TO THE HANDRAIL OF AN ADJACENT STAIR FLIGHT OR RAMP RUN, PER BC 1012.5.
- CONTRACTOR SHALL INSTALL FURRING, SHIMS AND ADDITIONAL LAYERS OF GYPSUM BOARD AS NECESSARY TO ACHIEVE FLUSH FINISH WHERE SURFACES OF ADJACENT WALL OR SHAFT ASSEMBLIES ARE NOT, BUT ARE INTENDED TO BE, ALIGNED.
- FOR GRID LAYOUT, SEE A1G-002.



PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**



- UNITS
- LEASING/LOBBY
- AMENITY/Common AREA
- CIRCULATION
- PARKING
- BOH
- RETAIL

**A1 LEVEL 2 FLOOR PLAN**  
1/16" = 1'-0"



MARK	DATE	DESCRIPTION
<b>REVISIONS</b>		

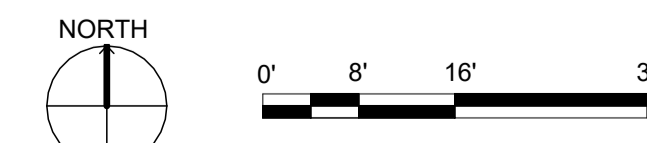
MARK	DATE	DESCRIPTION
B	08/11/2023	SCHEMATIC DESIGN SET
A	08/07/2023	SITE PLAN REVIEW SUBMITTAL

PROJECT NO.: **2022119.01**  
GGLO PRINCIPAL IN CHARGE:  
GGLO PROJECT MANAGER:  
OWNER APPROVAL:

SHEET TITLE:  
**OVERALL FLOOR PLAN -  
LEVEL 2**

SHEET NO.:  
**A-112**

8/7/2023 SITE PLAN REVIEW SUBMITTAL



**WHEN RECORDED MAIL TO:**

After recording, send to:  
KW Kelton-Bend Owner, LLC  
151 South El Camino Drive  
Beverly Hills, California 90212  
Attention: In Ku Lee

Deschutes County Official Records	<b>2022-00237</b>
D-D	<b>01/03/2022 03:30 PM</b>
Stn=1 BN	
\$25.00 \$11.00 \$10.00 \$61.00 \$6.00	<b>\$113.00</b>
I, Steve Dennison, County Clerk for Deschutes County, Oregon, certify that the instrument identified herein was recorded in the Official Records.	
Steve Dennison - County Clerk	

Until a change is requested,  
all tax statements shall be sent to:  
KW Kelton-Bend Owner, LLC  
151 South El Camino Drive  
Beverly Hills, California 90212  
Attention: Korpine Asset Manager

**SPECIAL WARRANTY DEED**

MCKENZIE CREEK DEVELOPMENT, LLC, an Oregon limited liability company ("Grantor"), conveys and specially warrants to KW KELTON-BEND OWNER, LLC, a Delaware limited liability company ("Grantee"), the real property described on Exhibit A attached hereto and incorporated herein (the "Property") together with, all and singular, all of Grantor's right, title and interest in and to (i) the rights, benefits, privileges, tenements, hereditaments, easements, rights-of-way and appurtenances belonging or in anywise appertaining to the same, including all mineral rights, development rights, air and water rights; (ii) the improvements thereon, including, without limitation, the apartment complex and all related facilities, amenities, structures, driveways and walkways, all of which have been constructed on the Property; and (iii) all strips and gores, and any land lying in the bed of any street, road or alley open or proposed adjoining such Property, and all privileges, easements, tenements, hereditaments, rights-of-way, appurtenances and other interests, open or proposed, in, on, under, across, in front of, abutting or adjoining the Property, free of encumbrances created or suffered by Grantor except for (v) real estate taxes and assessments not yet due and payable, (w) all acts and agreements of Grantee or anyone claiming by, through or under Grantee, (x) all existing zoning laws and ordinances and land use regulations, (y) any matter of record affecting the Property, and (z) those matters affecting the Property which would be disclosed by an accurate ALTA survey thereof.

The true and actual consideration for this transfer is \$40,000,000.

BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON TRANSFERRING FEE TITLE SHOULD INQUIRE ABOUT THE PERSON'S RIGHTS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010. THIS INSTRUMENT DOES NOT ALLOW USE OF THE PROPERTY DESCRIBED IN THIS INSTRUMENT IN VIOLATION OF APPLICABLE LAND USE LAWS AND REGULATIONS. BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON ACQUIRING FEE TITLE TO THE PROPERTY SHOULD CHECK WITH THE APPROPRIATE CITY OR COUNTY PLANNING DEPARTMENT TO VERIFY THAT THE UNIT OF LAND BEING TRANSFERRED IS A LAWFULLY ESTABLISHED LOT OR PARCEL, AS DEFINED IN ORS 92.010 OR 215.010, TO VERIFY THE APPROVED USES OF THE LOT OR PARCEL, TO DETERMINE ANY LIMITS ON LAWSUITS AGAINST FARMING OR FOREST PRACTICES, AS DEFINED IN ORS 30.930, AND TO INQUIRE ABOUT THE RIGHTS OF NEIGHBORING PROPERTY OWNERS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010.

[Signature appears on following page]

After recording, return to  
Amerititle  
15 OREGON AVENUE, BEND

509936AM

DATED this 31st day of December, 2021

**GRANTOR:**

MCKENZIE CREEK DEVELOPMENT, LLC,  
an Oregon limited liability company

By: [Signature]  
Name: Howard M. Day, Sr.  
Title: Manager

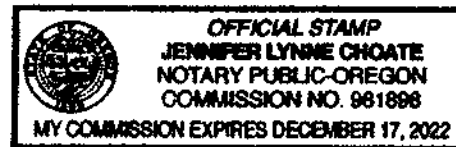
STATE OF OREGON )  
COUNTY OF Deschutes ) SS.

The foregoing instrument was acknowledged before me on this 28 day of December, 2021, by Howard M. Day, Sr., as the Manager of McKenzie Creek Development, LLC, an Oregon limited liability company.

[Signature]  
Notary Public for Oregon

[Notary Seal]

My commission expires: 12/17/2022



**EXHIBIT "A"**  
**Legal Description**

**Parcel 1:**

A tract of land located in the Northeast Quarter (NE1/4) of Section Five (5), Township Eighteen (18) South, Range Twelve (12), East of the Willamette Meridian, Deschutes County, Oregon, being more particularly described as follows:

Commencing at the Southeast corner of the West Half Northeast Quarter (W1/2 NE1/4) of said Section 5; thence North 00°55'07" West along the East line of said W1/2 NE1/4, a distance of 1573.29 feet to the true point of beginning; thence North 85°15'22" West, a distance of 1090.97 feet; thence South 69°49'30" West, a distance of 189.16 feet; thence North 02°47'39" West, a distance of 571.38 feet; thence on the arc of a 758.23 foot radius curve to the left, a distance of 206.58 feet, the chord bears North 79°00'03" East, 205.94 feet; thence North 71°11'45" East, a distance of 36.83 feet; thence on the arc of a 629.48 foot radius curve to the right, a distance of 211.94 feet, the chord bears North 80°50'29" East, 210.94 feet; thence South 89°30'48" East, a distance of 897.63 feet; thence on the arc of a 81.33 foot radius curve to the right, a distance of 79.02 feet, the chord bears South 61°40'51" East, 75.95 feet; thence South 33°50'54" East, a distance of 320.79 feet; thence on the arc of a 653.11 foot radius curve to the left, a distance of 123.83 feet, the chord bears South 23°55'59" West, 123.64 feet; thence South 18°30'06" West, a distance of 284.75 feet; thence North 85°15'22" West, a distance of 155.35 feet to the true point of beginning.

EXCEPT any portion lying within the right of way of Division Street.

TOGETHER WITH a tract of land located in a portion of Government Lot One (1) of Section Five (5), Township Eighteen (18) South, Range Twelve (12), East of the Willamette Meridian, Deschutes County, Oregon, being more particularly described as follows:

Commencing at the Southeast corner of the West Half of the Northeast Quarter (W1/2NE1/4) of said Section 5; thence North 00°55'07" West along the East line of said W1/2NE1/4, a distance of 1573.29 feet; thence South 85°15'22" East, a distance of 155.35 feet to the Southeast corner of Parcel 1 above, and the true point of beginning; thence North 18°30'06" East along the East line of Parcel 1 above, a distance of 284.75 feet; thence along said East line on the arc of a 653.11 foot radius curve to the right, a distance of 123.83 feet, (the chord bears North 23°55'59" East, 123.64 feet); thence South 33°50'31" East, a distance of 45.19 feet; thence following the arc of a 613.11 foot radius curve left, a distance of 95.87 feet, (the chord bears South 22°59'15" West, 95.77 feet); thence South 18°30'29" West, a distance of 274.96 feet to a point which bears South 85°15'22" East, a distance of 41.18 feet from the true point of beginning; thence North 85°15'22" West, a distance of 41.18 feet to the true point of beginning.

EXCEPT any portion lying within the right of way of Division Street.

Parcel 2:

All of Grantor's interest in that certain tract of land known as Industrial Way (a private road) and being more particularly described as follows:

A parcel of land located in a portion of the Northeast Quarter (NE1/4) of Section 5, Township 18 South, Range 12, East of the Willamette Meridian, Deschutes County, Oregon, being more particularly described as follows:

Beginning at a point on the south boundary of the Plat of Mill "A" Area of Shevlin Center as recorded April 6, 1983 in Plat Cabinet C, Page 104 in the office of the Deschutes County Clerk, which bears North 89°35'54" East a distance of 28.87 feet from the Southwest corner of said Plat; thence along said south boundary the following three courses and two curves:

North 89°35'54" East a distance of 120.00 feet;

149.08 feet along the arc of a tangent curve to the left with a radius of 464.31 feet, the chord of which bears North 80°24'01" East for a distance of 148.44 feet;

North 71°12'08" East a distance of 36.83 feet;

232.14 feet along the arc of a tangent curve to the right with a radius of 689.48 feet, the chord of which bears North 80°50'52" East for a distance of 231.05 feet;

South 89°30'25" East a distance of 80.92 feet to the southeast corner of said Plat and the southwest corner of Partition Plat No. 1998-26 as recorded June 18, 1998 in Partition Plat Cabinet 1, Page 669 in the office of the Deschutes County Clerk;

Thence along the south boundary of said Partition Plat continuing South 89°30'25" East a distance of 380.33 feet to the southeast corner of Parcel 1 of said Partition Plat and the southwest corner of the land described in Warranty Deed recorded October 1, 2002 in Volume 2000, Page 53925 of Deschutes County Official Records; thence along the south boundary of the lands described in said deed continuing South 89°30'25" East a distance of 255.18 feet to a point on the west boundary of "Parcel 1-Fee" as described in Deed recorded January 28, 1998 in Volume 478, Page 493 of Deschutes County Official Records; thence along said west boundary South 54°06'23" West a distance of 101.14 feet to a point on the north boundary of the lands described in Statutory Warranty Deed recorded March 11, 2004 in Volume 2004, Page 1337 of Deschutes County Official Records; thence along said north boundary the following two courses and two curves:

North 89°30'25" West a distance of 635.01 feet;

211.95 feet along the arc of a tangent curve to the left with a radius of 629.48 feet, the chord of which bears South 80°50'52" West for a distance of 210.94 feet;

South 71°12'08" West a distance of 36.83 feet;

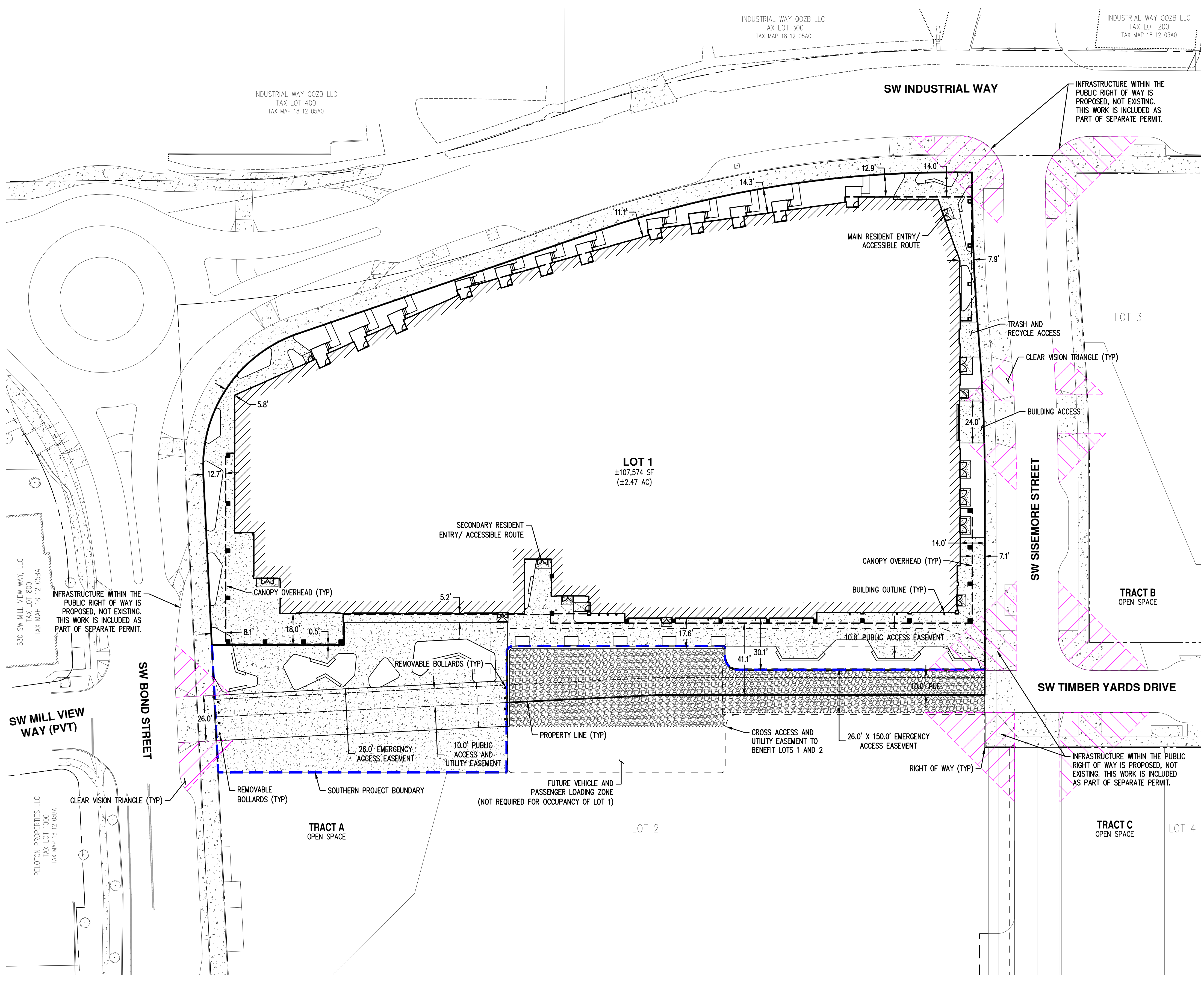
206.17 feet along the arc of tangent curve to the right with a radius of 758.23 feet, the chord of which bears South 78°59'31" West for a distance of 205.54 feet to a point on the boundary of Northside Terrace as recorded June 30, 1998 in Plat Cabinet E, Page 60 in the office of the Deschutes County Clerk

Thence along said Plat boundary the following two courses:

North 02°47'43" West a distance of 11.05 feet;

South 89°35'54" West a distance of 53.68 feet;

Thence leaving said Plat boundary 36.59 feet along a non-tangent curve to the left with a radius of 240.00 feet, the chord of which bears North 49°52'07" West a distance of 36.56 feet (said curve being parallel with and offset 80.00 feet from the northeasterly boundary of Lot 6 of said Plat) to a point on the east boundary of the 60 foot wide private way and utility easement as shown on the Plat of Mill "A" Area of Shevlin Center Second Addition, as recorded August 8, 1986 in Plat Cabinet C, Page 207 in the office of the Deschutes County Clerk; thence along said east boundary North 02°47'16" West a distance of 36.27 feet to the Point of Beginning.



**SITE SUMMARY**

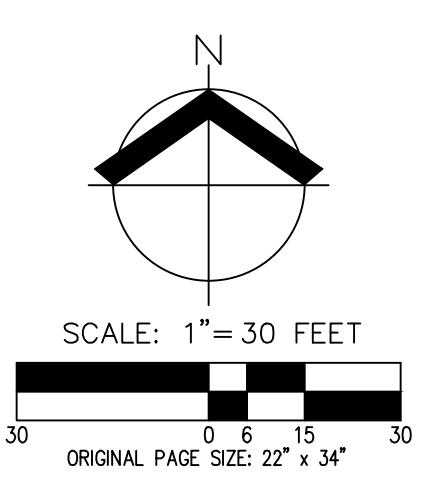
- LOT 1 SITE AREA SUMMARY AND ZONING  
±107,574 SF / ±2.47 ACRES  
ZONING - MIXED USE URBAN (MU)  
RESIDENTIAL UNIT COUNT - ±246 DWELLING UNITS  
COMMERCIAL - ±15,973 SF
- PROJECT AREA  
±115,067 / ±2.64 ACRES

**PARKING SUMMARY**

- STRUCTURED PARKING TO BE PROVIDED WITHIN THE INTERIOR OF THE BUILDING. SEE PRELIMINARY ARCHITECTURAL PLANS.

**LEGEND**

- VEHICLE ACCESS TURNAROUND IS NOT REQUIRED FOR OCCUPANCY OF THE BUILDING ON LOT 1 AND IS SHOWN FOR REFERENCE ONLY. DESIGN AND CONSTRUCTION OF THIS AREA IS TO BE INCLUDED AS PART OF THE PERMITS FOR LOT 2.
- CLEAR VISION TRIANGLE (TYP)
- SOUTHERN PROJECT BOUNDARY



# TIMBER YARDS LOT 1

PROJECT ADDRESS: 175 SW INDUSTRIAL WAY  
BEND, OR 97702

GGLO PROJECT NUMBER: 2022119.01  
SPR APPLICATION NUMBER: \_\_\_\_\_  
BUILDING PERMIT NUMBER: \_\_\_\_\_

APPLICANT: KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212



PROJECT: **TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
175 SW INDUSTRIAL WAY  
BEND, OR 97702

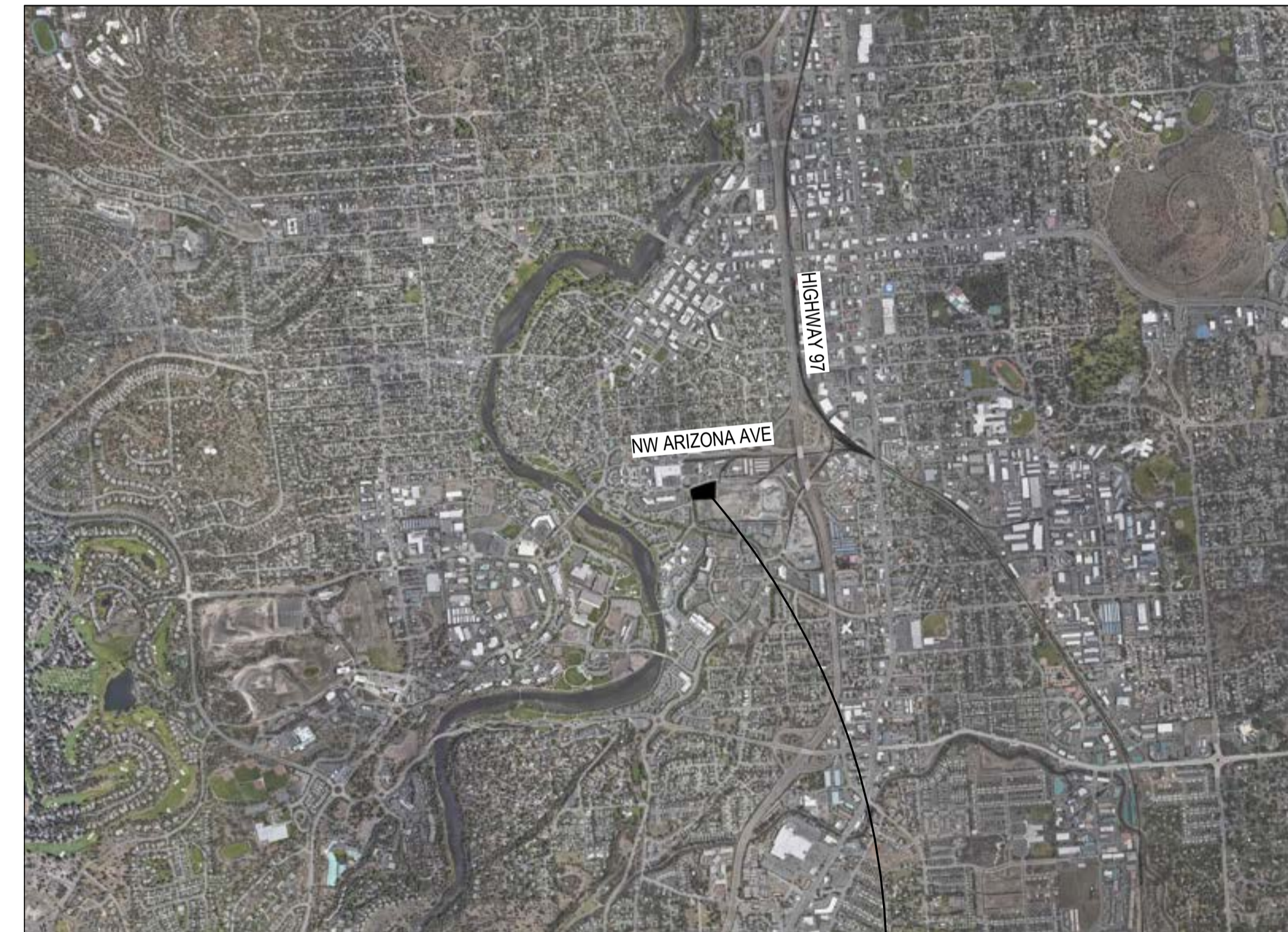
OWNER:  
KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212

## PRELIMINARY ARCHITECTURAL PLANS 8/7/2023

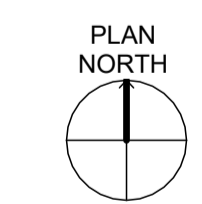
### PROJECT DIRECTORY

<p><b>OWNER:</b> Kennedy Wilson 151 South El Camino Drive Beverly Hills, CA 90212 Contact: Keith Herren Email: kherren@kennedywilson.com Phone: (861) 331-8596</p>	<p><b>LANDSCAPE ARCHITECT:</b> GGLO 1301 5th Ave, Suite 2200 Seattle, WA 98101 Contact: Mark Sindell Email: msindell@gglo.com Phone: (206) 467-5828</p>	<p><b>INTERIOR DESIGN:</b> VIDA 107 SE Washington St, Suite 263 Portland, OR 97214 Contact: Sheena Brittingham Email: sheena@vida-design.com Phone: (503) 227-0981</p>	<p><b>STRUCTURAL:</b> VCA Structural 1845 W. Orangewood Ave, Suite 200 Orange, CA 92668 Contact: Jay Lin Email: jay.lin@vcastructural.com Phone: (714) 978-9780</p>	<p><b>ELECTRICAL:</b> Sizán Group 111 SW Fifth Ave, Suite 3210 Portland, OR 97204 Contact: Daniel Touger Email: dtouger@sazan.com Phone: (503) 416-2400</p>
<p><b>ARCHITECT:</b> GGLO 1301 5th Ave, Suite 2200 Seattle, WA 98101 Contact: Tina Rivai Email: trivai@gglo.com Phone: (206) 467-5828</p>	<p><b>GENERAL CONTRACTOR:</b> PCL 13920 SE Eastgate Way, Suite 400 Bellevue, WA 98005 Contact: Daniel Brown Email: dbrown@gcd.com Phone: (425) 519-7374</p>	<p><b>PLANNING/CIVIL SURVEY:</b> AKS Engineering &amp; Forestry 2777 NW Lolo Drive, Suite 150 Bend, OR 97703 Contact: Joey Shearer Email: jshearer@aks-eng.com Phone: (541) 317-8429</p>	<p><b>MECHANICAL:</b> Sizán Group 111 SW Fifth Ave, Suite 3210 Portland, OR 97204 Contact: Daniel Touger Email: dtouger@sazan.com Phone: (503) 416-2400</p>	<p><b>PLUMBING:</b> Sizán Group 111 SW Fifth Ave, Suite 3210 Portland, OR 97204 Contact: Daniel Touger Email: dtouger@sazan.com Phone: (503) 416-2400</p>

### VICINITY MAP



SITE



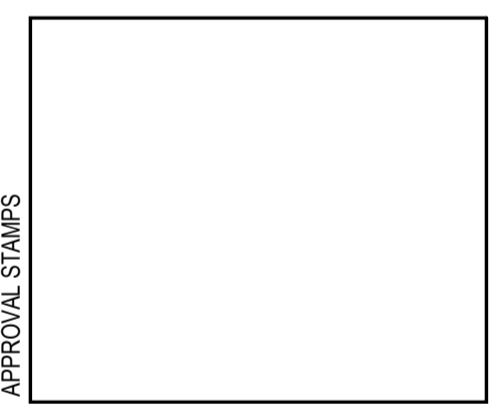
MAP NOT TO SCALE

### SHEET INDEX

**GENERAL INFORMATION**  
G-001-SPR COVER SHEET  
G-020 ZONING CODE SUMMARY  
G-021 ZONING DIAGRAMS - FLOOR AREA

**LANDSCAPE**  
L-101 SCHEMATIC LANDSCAPE LAYOUT PLAN

**ARCHITECTURAL**  
A-111 OVERALL FLOOR PLAN - LEVEL 1  
A-112 OVERALL FLOOR PLAN - LEVEL 2  
A-113 OVERALL FLOOR PLAN - LEVEL 3  
A-114 OVERALL FLOOR PLAN - LEVEL 4  
A-115 OVERALL FLOOR PLAN - LEVEL 5  
A-116 OVERALL FLOOR PLAN - LEVEL 6  
A-117 OVERALL ROOF PLAN  
A-200 OVERALL EXTERIOR ELEVATIONS  
A-201 OVERALL EXTERIOR ELEVATIONS  
A-300 OVERALL BUILDING SECTIONS



MARK DATE DESCRIPTION  
**REVISIONS**

A 08/07/2023 SITE PLAN REVIEW SUBMITTAL

MARK DATE DESCRIPTION

**ISSUE INFORMATION**

PROJECT NO.: **2022119.01**

GGLO PRINCIPAL IN CHARGE:

GGLO PROJECT MANAGER:

OWNER APPROVAL:

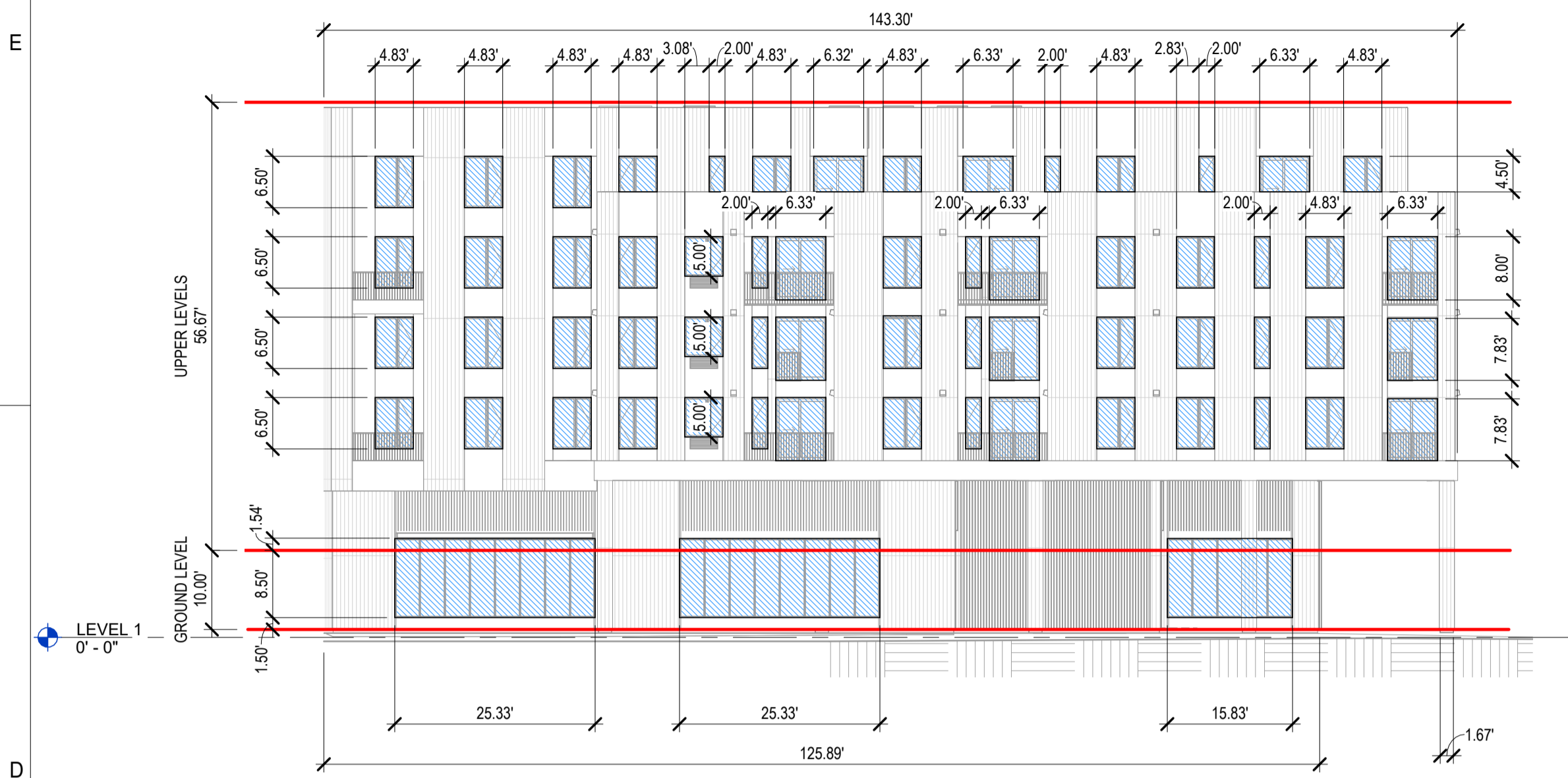
SHEET TITLE  
**COVER SHEET**

SHEET NO.  
**G-001-SPR**



**BDC 2.7.4750 (A)(3)(A) - TRANSPARENCY ALONG SW BOND STREET**

**TRANSPARENCY / GLAZING LEGEND**



<b>UPPER LEVEL TRANSPARENCY</b>	
AREA OF UPPER LEVEL FACADE:	8,264.11 SF 57.67' x 143.30' = 8,264.11 SF
AREA OF UPPER LEVEL TRANSPARENCY:	1,812.26 SF 1,812.26 SF / 8,264.11 SF = <b>21.93%</b> (20% REQ. BDC 2.7.4750.3.A)
<b>GROUND LEVEL TRANSPARENCY</b>	
AREA OF GROUND LEVEL FACADE:	1,275.90 SF 10' x (125.89' + 1.67') = 1,275.60 SF
AREA OF GROUND LEVEL TRANSPARENCY:	565.25 SF 565.25 SF / 1,275.60 SF = <b>44.31%</b> (40% REQ. BDC 2.7.4750.3.A)

**D1 WEST - SW BOND ST**  
1/16" = 1'-0"

**BDC 2.7.4750 (A)(3)(B) - TRANSPARENCY ALONG SW EVERPINE STREET & SW INDUSTRIAL WAY**



<b>UPPER LEVEL TRANSPARENCY</b>	
AREA OF UPPER LEVEL FACADE:	13,971.71 SF = 57.67' x 242.27'
AREA OF UPPER LEVEL TRANSPARENCY:	3,053.12 SF 3,053.12 SF / 13,971.71 SF = <b>21.88%</b> (20% REQ. BDC 2.7.4750.3.B)
<b>GROUND LEVEL TRANSPARENCY</b>	
AREA OF GROUND LEVEL FACADE:	2,428.40 SF = 10' x (1.92' + 202.82' + 38.10')
AREA OF GROUND LEVEL TRANSPARENCY:	631.81 SF 631.81 SF / 2,428.40 SF = <b>26.02%</b> (25% REQ. BDC 2.7.4750.3.B)

**B1 EAST - SW EVERPINE STREET**  
1/16" = 1'-0"



<b>UPPER LEVEL TRANSPARENCY</b>	
AREA OF UPPER LEVEL FACADE:	25,300.41 SF = 57.67 SF x (72.42 SF + 113.32 SF + 113.34 SF + 139.63 SF)
AREA OF UPPER LEVEL TRANSPARENCY:	6,888.30 SF 6,888.30 SF / 25,300.41 SF = <b>27.23%</b> (20% REQ. BDC 2.7.4750.3.B)
<b>GROUND LEVEL TRANSPARENCY</b>	
AREA OF GROUND LEVEL FACADE:	4,216.10 SF = 10 SF x (1.92 SF + 53.40 SF + 113.32 SF + 113.34 SF + 139.63 SF)
AREA OF GROUND LEVEL TRANSPARENCY:	1,495.35 SF 1,495.35 SF / 4,216.10 SF = <b>35.47%</b> (25% REQ. BDC 2.7.4750.3.B)

**A1 NORTH - SW INDUSTRIAL WAY**  
1/16" = 1'-0"

<b>UPPER LEVEL TRANSPARENCY</b>	
AREA OF UPPER LEVEL FACADE:	25,300.41 SF = 57.67 SF x (72.42 SF + 113.32 SF + 113.34 SF + 139.63 SF)
AREA OF UPPER LEVEL TRANSPARENCY:	6,888.30 SF 6,888.30 SF / 25,300.41 SF = <b>27.23%</b> (20% REQ. BDC 2.7.4750.3.B)
<b>GROUND LEVEL TRANSPARENCY</b>	
AREA OF GROUND LEVEL FACADE:	4,216.10 SF = 10 SF x (1.92 SF + 53.40 SF + 113.32 SF + 113.34 SF + 139.63 SF)
AREA OF GROUND LEVEL TRANSPARENCY:	1,495.35 SF 1,495.35 SF / 4,216.10 SF = <b>35.47%</b> (25% REQ. BDC 2.7.4750.3.B)

**ZONING SUMMARY**

PROJECT: TIMBER YARDS LOT 1  
 ADDRESS: 175 SW INDUSTRIAL WAY BEND, OR 97702  
 CODE: CITY OF BEND DEVELOPMENT CODE  
 ZONE: MIXED-USE URBAN (MU)  
 OVERLAY ZONE: TIMBER YARDS MASTER PLAN  
 LOT 1 AREA: +2.47 ACRES / +107,574 SF  
 PROJECT AREA: +2.84 ACRES / +115,067 SF  
 PROPOSED FLOOR AREA: 343,638 SF (SEE SHEET G-021 FOR AREA PLANS AND SCHEDULE)  
 PROPOSED DWELLING UNITS: 246

**TITLE 2**  
 PROPOSED USES: MULTI-UNIT RESIDENTIAL, RETAIL SALES AND SERVICE, & RESTAURANTS/FOOD AND BEVERAGE SERVICES  
 PROPOSED BUILDING HEIGHT: 67'-6" MAX PER BDC 2.3.300.B.1 / TIMBER YARDS MASTER PLAN OVERLAY  
 DESIGN STANDARDS (PER TIMBER YARDS MASTER PLAN, SECTION 2.7.4750)  
 (A)(1) BUILDING AND ENTRY ORIENTATIONS: SEE CIVIL PLANS AND SHEET A-111.  
 (A)(2) FACADE HEIGHT MINIMUM: 20' MIN. AT BOND 15' MIN. AT INDUSTRIAL AND EVERPINE. SEE EXTERIOR ELEVATIONS, SHEETS A-200 & A-201  
 (A)(3) TRANSPARENCY: MIN. 40% OF GROUND LEVEL WALL AREA AND 20% OF UPPER LEVELS WALL AREA ON BOND MIN. 25% OF GROUND LEVEL WALL AREA AND 20% OF UPPER LEVELS WALL AREA ON INDUSTRIAL AND EVERPINE. SEE A1, B1, & D1, SHEET G-020

(A)(4) BUILDING ARTICULATION: SEE TRANSPARENCY CALCULATIONS, THIS SHEET, & EXTERIOR ELEVATIONS, SHEETS A-200 & A-201. PROPOSED ARTICULATION INCLUDES TRANSPARENCY GREATER THAN THE MINIMUM REQUIRED AND USE OF TWO OR MORE FACADE MATERIALS AND/OR FACADE COLORS.  
 (A)(5) EXTERIOR COLORS: SEE EXTERIOR ELEVATIONS, SHEETS A-200 & A-201

**TITLE 3**  
 PROPOSED LANDSCAPE COVERAGE: NONE REQUIRED PER BDC 2.3.300 (E)

PROPOSED PARKING:  
 • NO MINIMUM REQUIRED PER BDC 3.3.300 (A)  
 • ALL PROVIDED PARKING IS WITHIN THE BUILDING FOOTPRINT OF THE PROPOSED STRUCTURE AND DOES NOT APPLY TOWARDS THE MAXIMUM NUMBER OF ALLOWABLE SPACES PER BDC 3.3.300 (B)  
 • SEE GARAGE PARKING SCHEDULE ON SHEETS A-111 & A-112 FOR PROPOSED PARKING PROVIDED

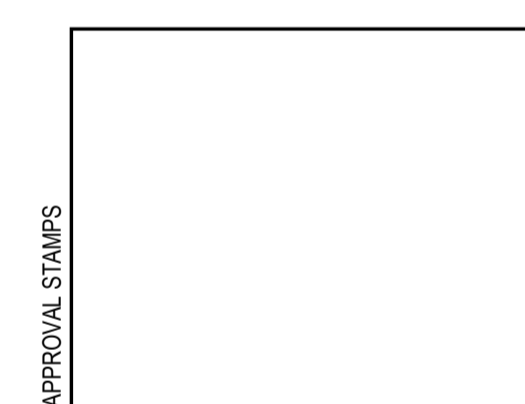
PROPOSED BICYCLE PARKING (SEE SHEETS A-111 & A-112 FOR LOCATIONS PROVIDED):  
 MULTI-FAMILY RESIDENTIAL USE (246 DWELLING UNITS):  
 • 240 SECURE STORAGE SPACES PROVIDED IN SHARED PARKING GARAGE PER BDC 3.3.600 (E)  
 • 6 COVERED SPACES PROVIDED AT RESIDENTIAL LOBBY ENTRANCES PER BDC 3.3.600 (C), (D), (F), (G), & (H)  
 GENERAL COMMERCIAL USE (15,973 SF):  
 • 2 SECURE STORAGE SPACES PROVIDED IN SHARED PARKING GARAGE PER BDC 3.3.600 (E)  
 • 6 COVERED SPACES PROVIDED AT COMMERCIAL ENTRY POINTS PER BDC 3.3.600 (C), (D), (F), (G), & (H)

OUTDOOR LIGHTING STANDARDS:  
 • PROPOSED SITE LIGHTING TO BE FULL CUT-OFF FIXTURES OR HAVE SHIELDING CAPABLE OF DIRECTING LIGHT DOWN ONTO THE SITE AND NOT ONTO ADJACENT PROPERTIES  
 • NO LASER SOURCE LIGHT FIXTURES, SEARCHLIGHTS, OR EXTERNALLY AFFIXED NEON LIGHTING IS PROPOSED



PROJECT: **TIMBER YARDS - LOT 1**  
 PROJECT ADDRESS: **175 SW INDUSTRIAL WAY BEND, OR 97702**

OWNER: **KENNEDY WILSON 151 SOUTH EL CAMINO DRIVE BEVERLY HILLS, CA 90212**



MARK	DATE	DESCRIPTION
<b>REVISIONS</b>		

MARK	DATE	DESCRIPTION
E	01/22/2024	PHASE I PERMIT SET
A	08/07/2023	SITE PLAN REVIEW SUBMITTAL

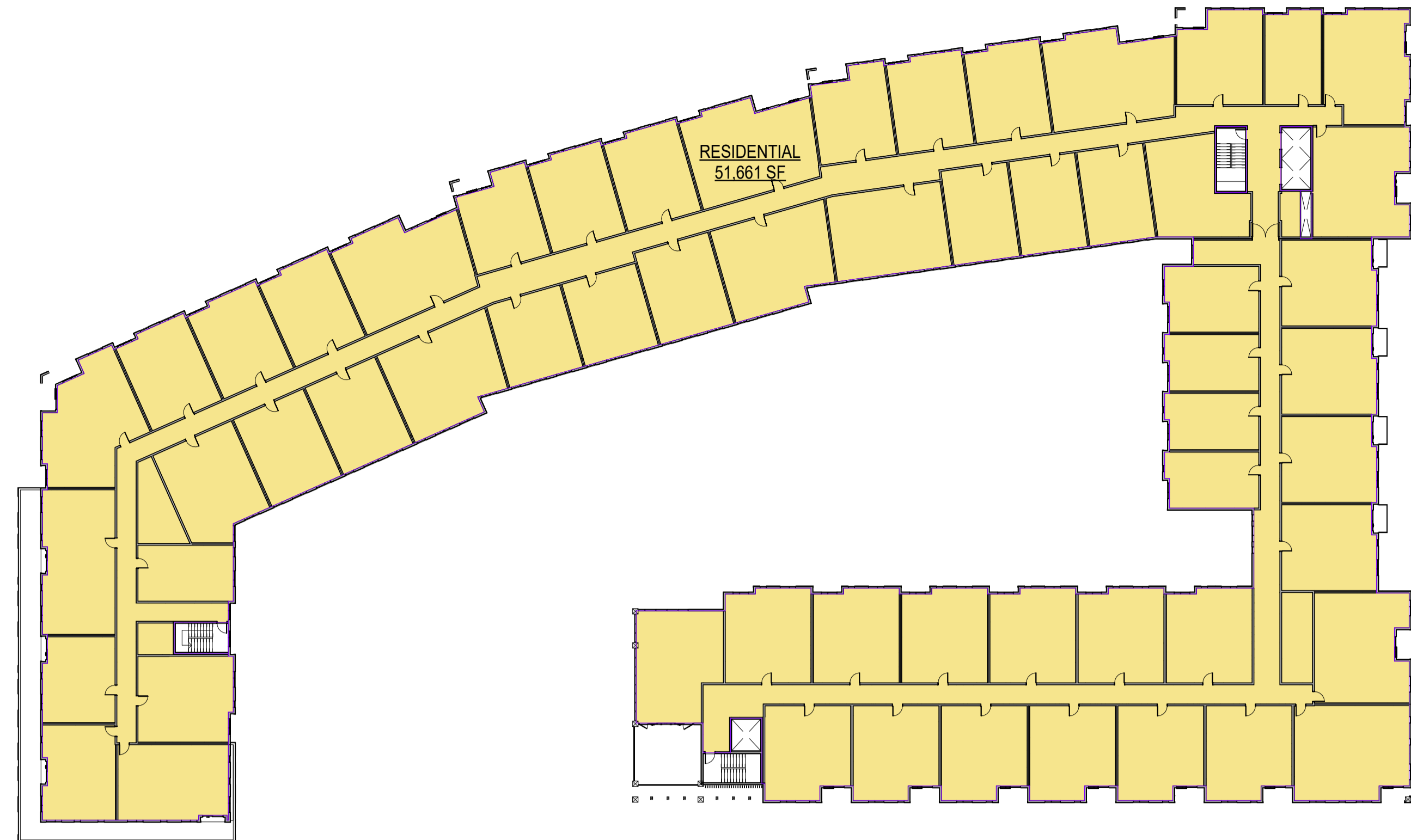
**ISSUE INFORMATION**

PROJECT NO.: **2022119.01**  
 GGLO PRINCIPAL IN CHARGE: **TINA RITVAL**  
 GGLO PROJECT MANAGER: **BRENNAN MALONEY**  
 OWNER APPROVAL:

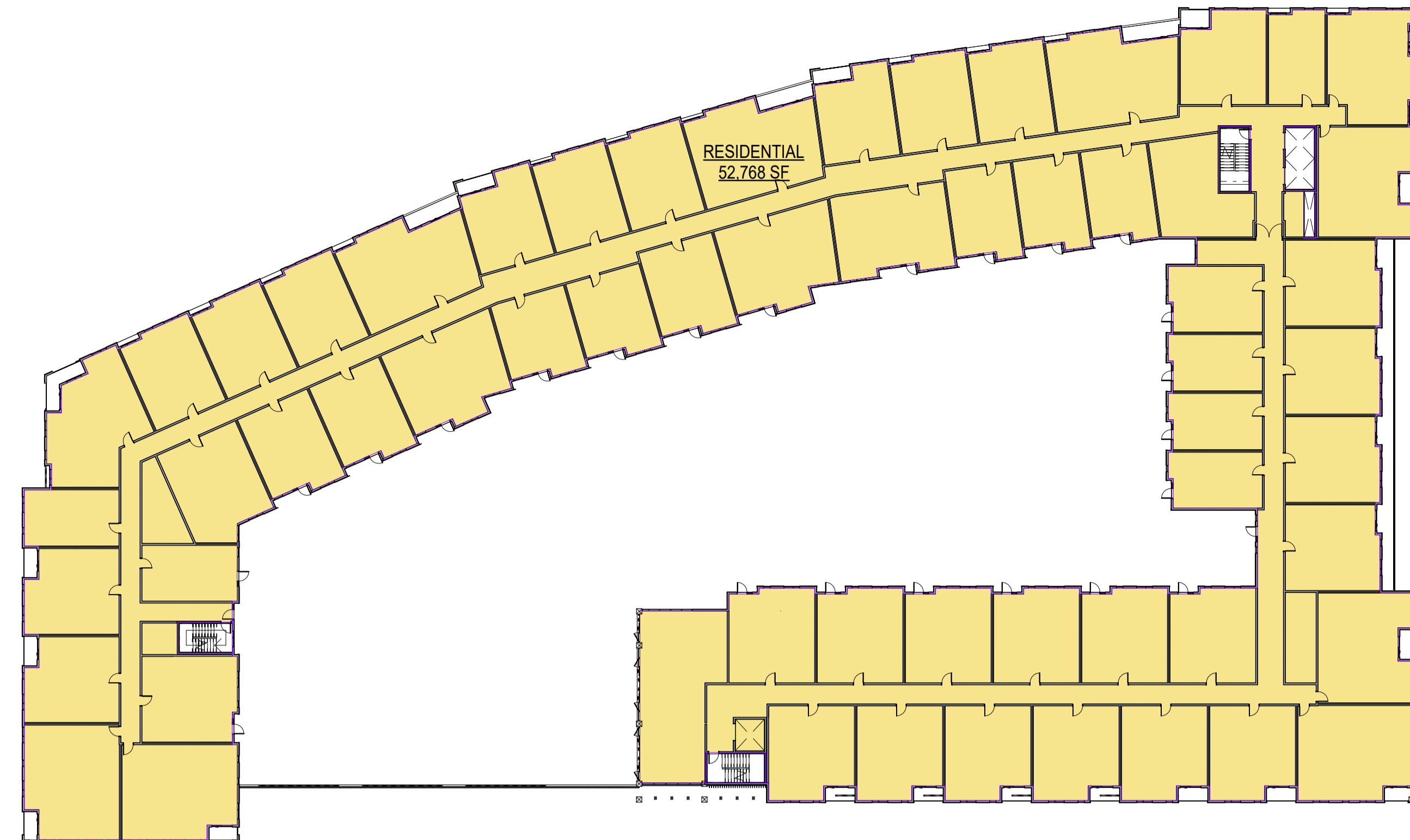
**ZONING CODE SUMMARY**

SHEET NO. **G-020**

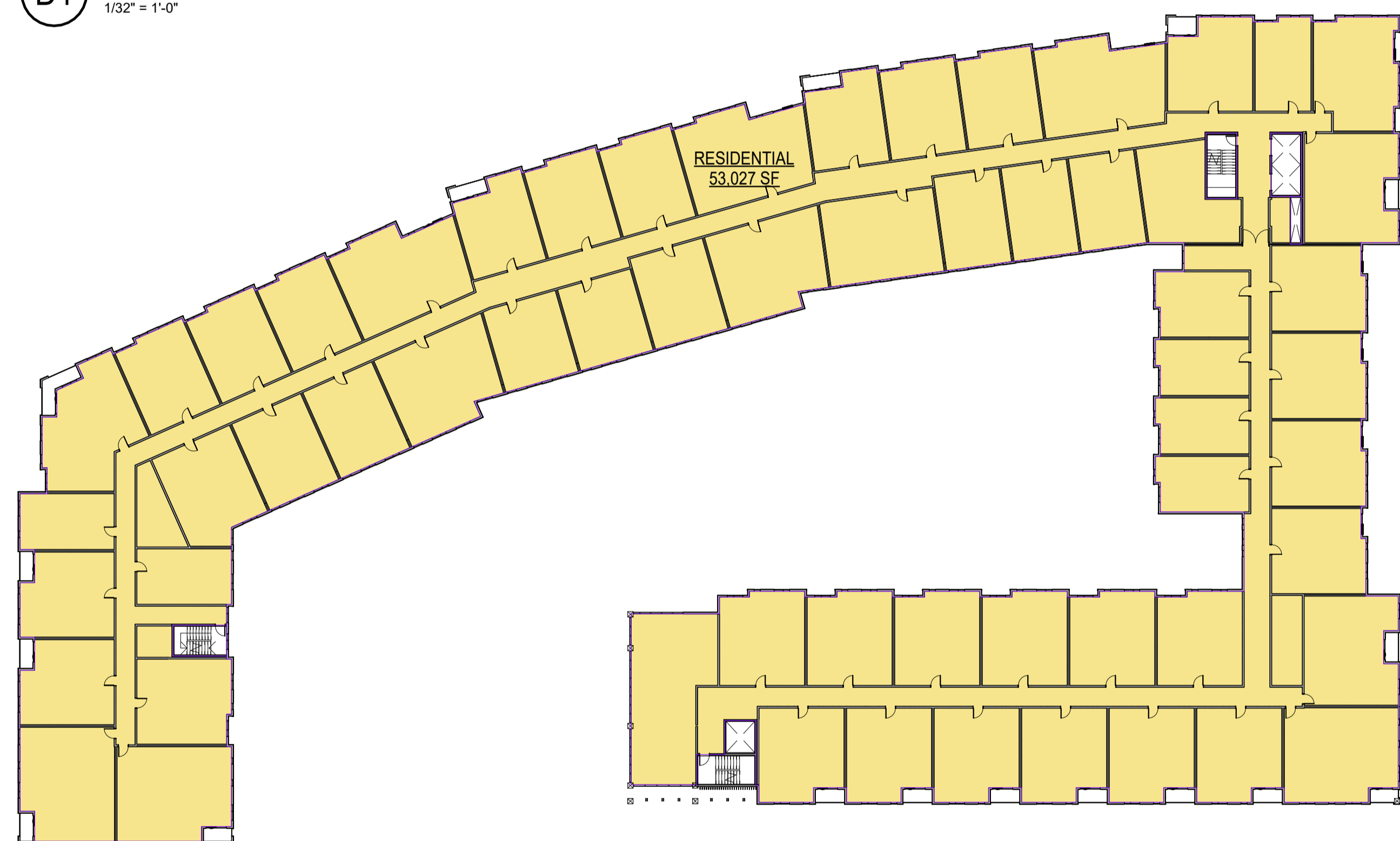
1/08/2024 SPR REVISED PROJECT AREA



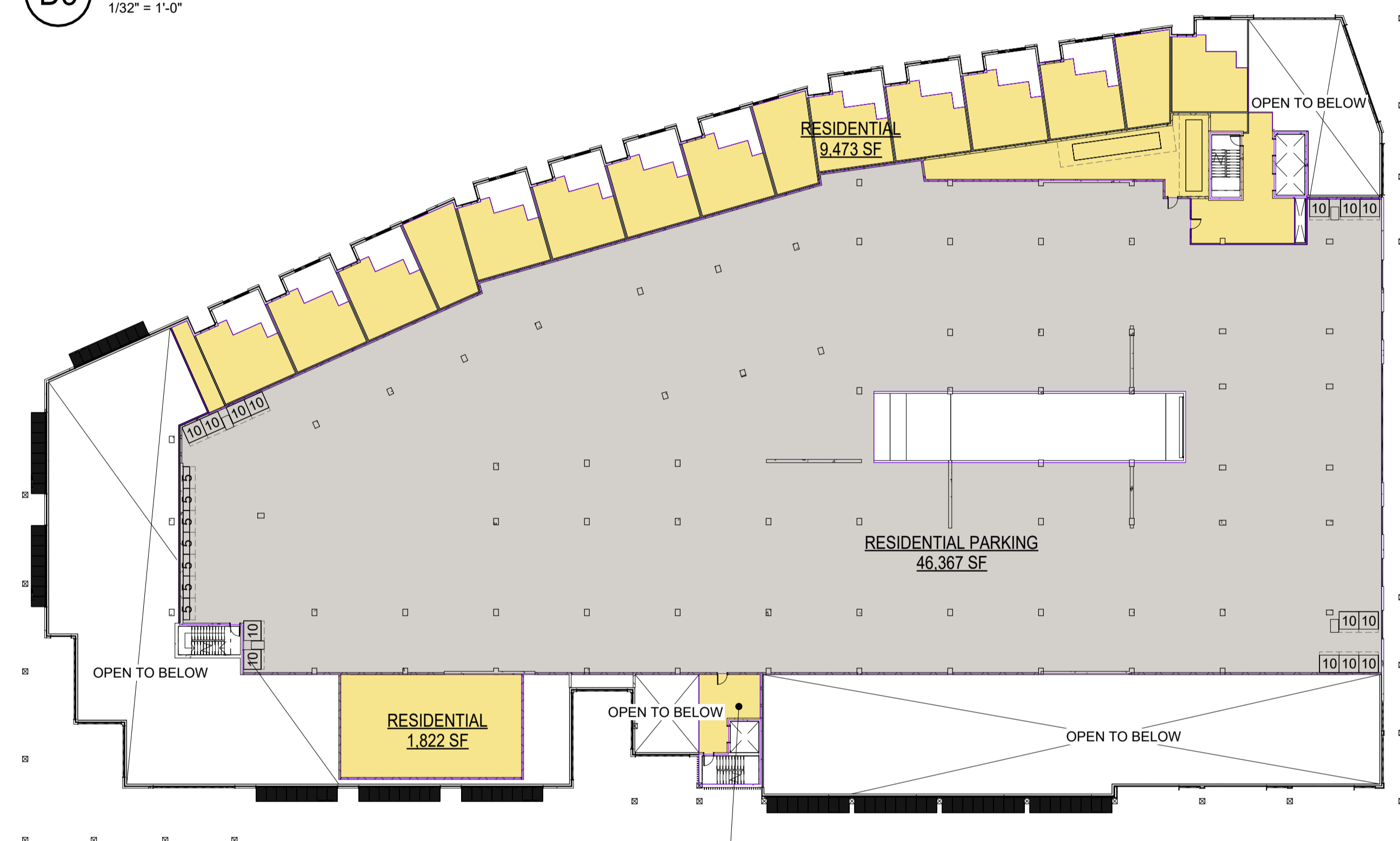
**D1 LEVEL 6**  
1/32" = 1'-0"



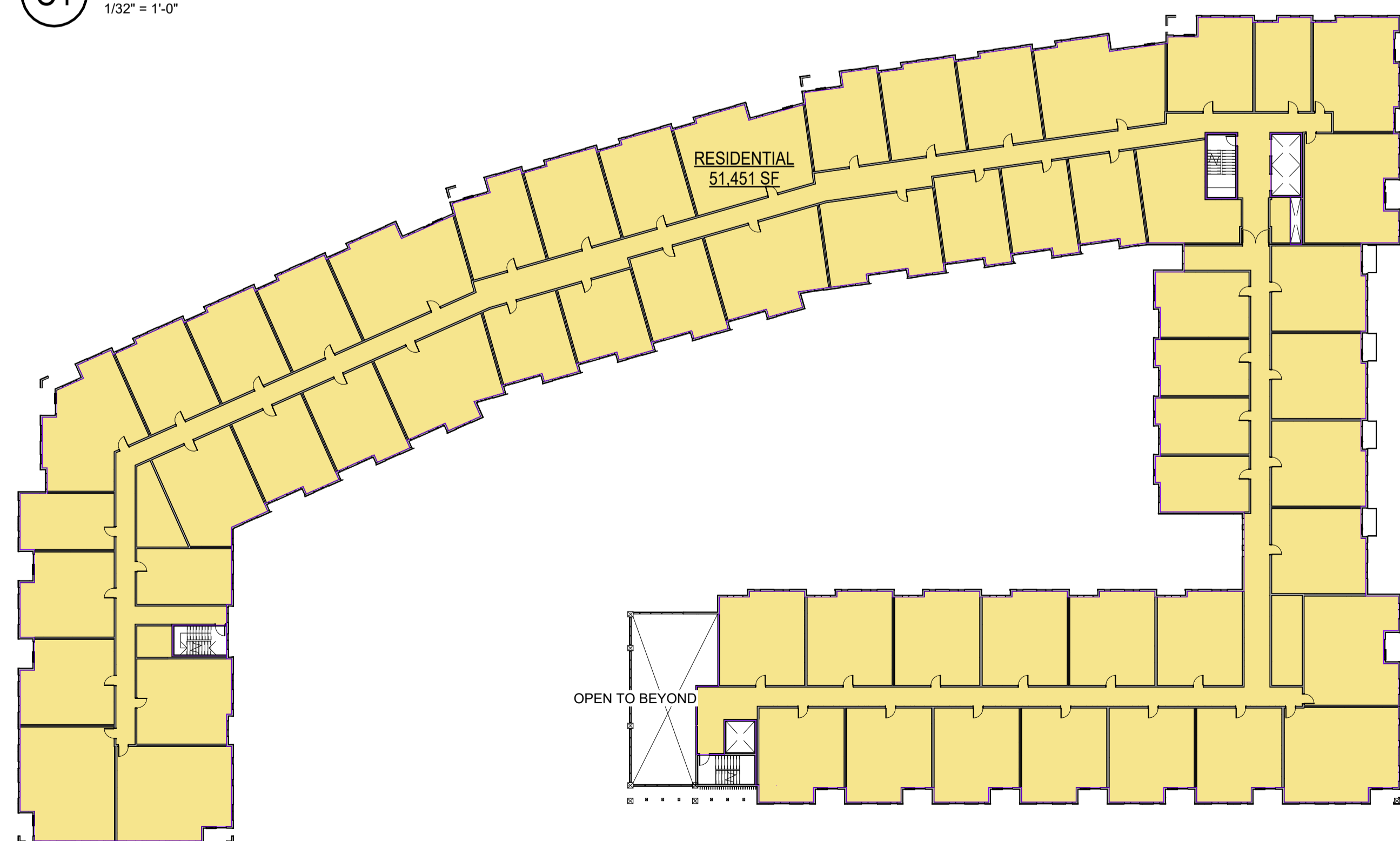
**D3 LEVEL 3**  
1/32" = 1'-0"



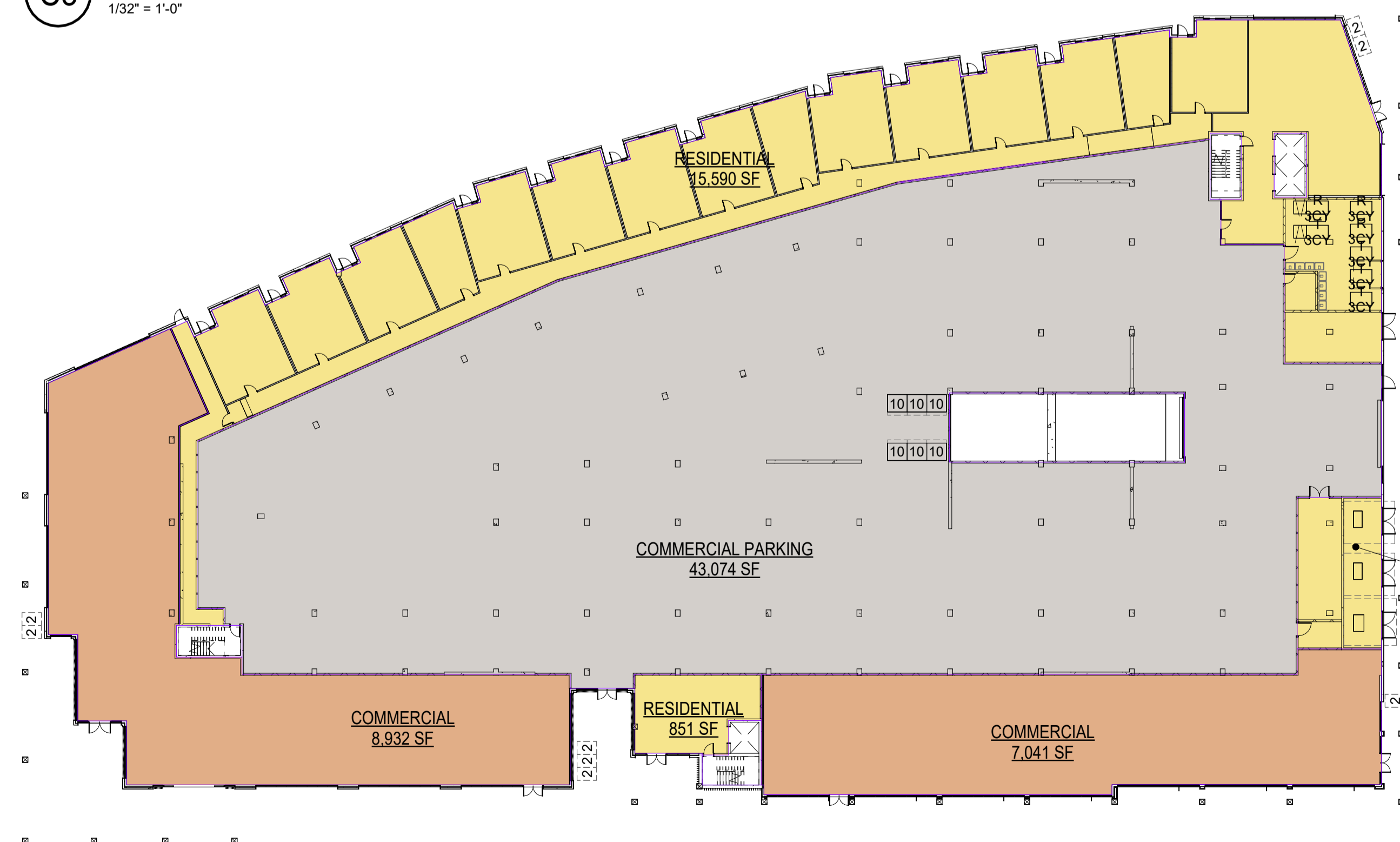
**C1 LEVEL 5**  
1/32" = 1'-0"



**C3 LEVEL 2**  
1/32" = 1'-0"



**A1 LEVEL 4**  
1/32" = 1'-0"



**A3 LEVEL 1**  
1/32" = 1'-0"

**FLOOR AREA BY LEVEL**

USE	AREA (SF)
LEVEL 1	
COMMERCIAL	15,973 SF
COMMERCIAL PARKING	43,074 SF
RESIDENTIAL	17,654 SF
RESIDENTIAL PARKING	76,701 SF
LEVEL 2	
RESIDENTIAL	11,663 SF
RESIDENTIAL PARKING	46,367 SF
LEVEL 3	
RESIDENTIAL	52,768 SF
LEVEL 4	
RESIDENTIAL	51,451 SF
LEVEL 5	
RESIDENTIAL	53,027 SF
LEVEL 6	
RESIDENTIAL	51,661 SF
TOTAL	343,638 SF

**FLOOR AREA BY USE**

USE	AREA (SF)
COMMERCIAL	15,973 SF
COMMERCIAL PARKING	43,074 SF
RESIDENTIAL	238,294 SF
RESIDENTIAL PARKING	46,367 SF
TOTAL	343,638 SF

**FLOOR AREA LEGEND**

- COMMERCIAL
- COMMERCIAL PARKING
- RESIDENTIAL
- RESIDENTIAL PARKING
- RESIDENTIAL BIKE PARKING

APPROVAL STAMPS

MARK DATE DESCRIPTION

REVISIONS

A 08/07/2023 SITE PLAN REVIEW SUBMITTAL

MARK DATE DESCRIPTION

ISSUE INFORMATION

PROJECT NO.: **2022119.01**

GGLO PRINCIPAL IN CHARGE:

GGLO PROJECT MANAGER:

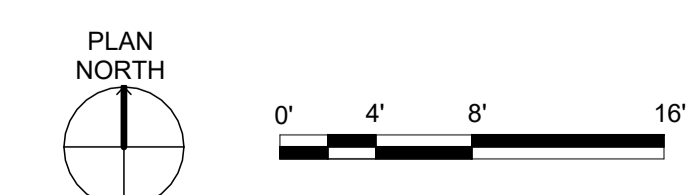
OWNER APPROVAL:

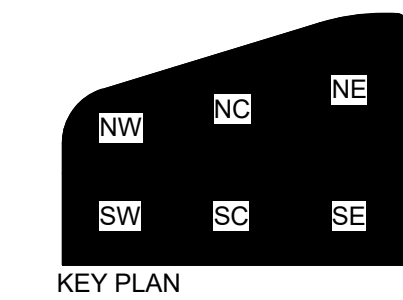
SHEET TITLE

**ZONING DIAGRAMS -  
FLOOR AREA**

SHEET NO.

**G-021**





PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**

NOT FOR CONSTRUCTION

NOT FOR CONSTRUCTION

MARK DATE DESCRIPTION

**REVISIONS**

C 11/09/2023 100% DD SET

B 10/06/2023 50% DD SET

A 08/07/2023 SITE PLAN REVIEW SUBMITTAL

MARK DATE DESCRIPTION

**ISSUE INFORMATION**

PROJECT NO. **2022119.00**

GGLO PRINCIPAL IN CHARGE: **TINA RITVAL**

GGLO PROJECT MANAGER: **BRENNAN MALONEY**

OWNER APPROVAL:

PROJECT TITLE

**SCHEMATIC LANDSCAPE**

**LAYOUT PLAN**

SHEET NO.

**L-101**

COPYRIGHT GGLO. ALL RIGHTS RESERVED.

ORIGINAL SHEET SIZE IS 30"X42"

### LANDSCAPE CALCULATIONS

**SITE REQUIREMENTS**  
LOT 1 AREA: +12.47 ACRES / +1,107,574 SF  
PROJECT AREA: +2.64 ACRES / +115,067 SF  
REQUIRED LANDSCAPE AREA: 0 SF, PER BDC 2.3.300(E)

**PARKING REQUIREMENTS**  
NO SURFACE PARKING LOTS PROVIDED, SEE ARCH FOR PARKING CALCULATIONS

**STREET TREE REQUIREMENTS**  
REQUIRED STREET TREES AT 35' O.C.  
PROVIDED STREET TREES IN POSSIBLE PLANTING AREAS AT MAX 35' O.C.

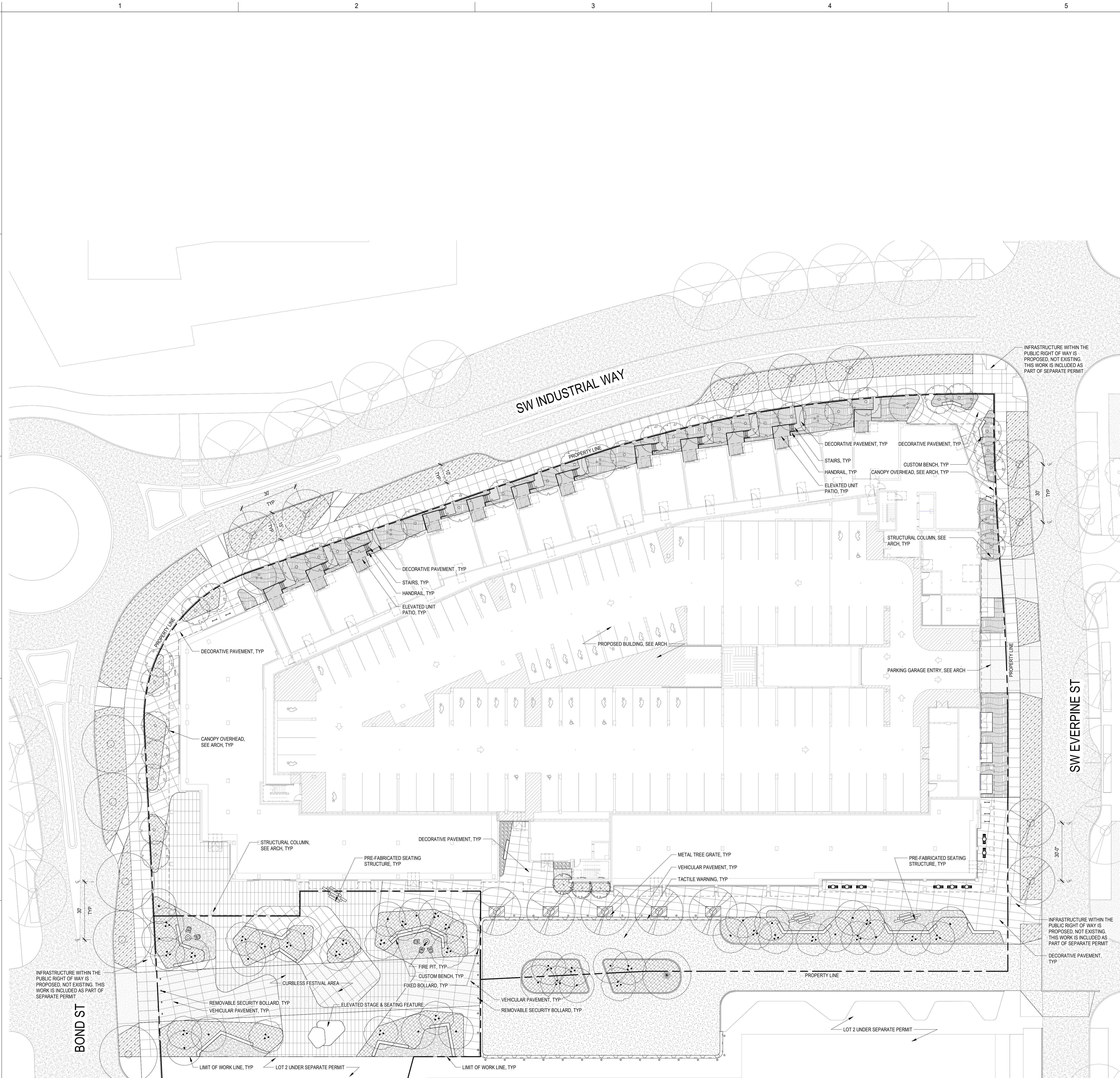
### CONCEPT PLANTING SCHEDULE

TREES	SYMBOL	TYPE	SIZE	SPACING	QTY.
STREET TREE		QUERCUS RUBRA - RED OAK	2' CAL MIN	AS SHOWN	PER PLAN
STREET TREE		SLEDITSA TRIANCANTHOS 'NORTHERN ACCLAIM' - NORTHERN ACCLAIM HONEYLOCUST	2' CAL MIN	AS SHOWN	PER PLAN
EVERGREEN TREE, SUCH AS:		PSEUDOTSUGA MENZIESII - DOUGLAS FIR	15'-0" HT MIN	AS SHOWN	PER PLAN
ORNAMENTAL TREE, SUCH AS:		POPULUS TREMULOIDES - QUAKING ASPEN	2' CAL MIN	AS SHOWN	PER PLAN
SMALL TREE, SUCH AS:		ACER GLABRUM - ROCKY MOUNTAIN MAPLE AMELANCHIER ALNIFOLIA - SERVICEBERRY BETULA NIGRA - RIVER BIRCH PRUNUS VIRGINIANA - CHOKECHERRY	8'-0" HT MIN	AS SHOWN	PER PLAN

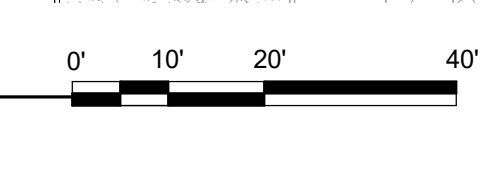
SHRUBS, GRASSES, PERENNIALS, & GROUNDCOVERS	SYMBOL	TYPE	SIZE	SPACING	QTY.
RIPIARIAN PLANTING MIX, CONTAINING:		CAREX OENOPTA - SLOUGH SEDGE CORNUS STOLONIFERA - RED OSIER DOGWOOD DESCAMPISIA CESPIITOSA - TUFTED HAIRGRASS JUNCUS EFFRUSUS - COMMON RUSH PHYSOCARPUS CAPITATUS - PACIFIC NINEBARK ROSA WOODSII - WOODS ROSE SPIRAEA DOUGLASSII - DOUGLAS SPIREA SYMPHORICARPOS ALBUS - SNOWBERRY	1 GAL MIN	TBD PER FINAL PLANTING PLAN	TBD PER FINAL PLANTING PLAN
ASPEN WOODLAND MIX, CONTAINING:		CAREX TUMULICOLA - BERKELEY SEDGE ERICOPHYLLUM LANATUM - OREGON SUNSHINE FESTUCA IDAHOENSIS - IDAHO FESCUE HIPPOPHAE RHAMNOIDES - SEA BUCKTHORN MAHONIA REPENS - LOW OREGON GRAPE RIBES ALPINUM - ALPINE CURRANT SCHIZACHYRIUM SCOPARIMUM - LITTLE BLUESTEM VACCINIUM ANGUSTIFOLIUM - LOWBUSH BLUEBERRY	1 GAL MIN	TBD PER FINAL PLANTING PLAN	TBD PER FINAL PLANTING PLAN
ROW PLANTING, CONTAINING:		FESTUCA IDAHOENSIS - IDAHO FESCUE IPMOPSIS AGGREGATA - SCARLET GLIA LAVANDULA ANGSTIFOLIA - ENGLISH LAVENDER LUPINUS SERICEA - SILKY LUPINE MAHONIA REPENS - LOW OREGON GRAPE POTENTILLA FRUTICOSA - SHRUBBY CINQUEFOIL PRUNUS BESSERI - PAVINEE BUTTES SAND CHERRY SYMPHORICARPOS ALBUS - SNOWBERRY	1 GAL MIN	TBD PER FINAL PLANTING PLAN	TBD PER FINAL PLANTING PLAN

### LANDSCAPE NOTES

- THIS PLAN IS SCHEMATIC IN NATURE AND INTENDED TO SHOW ZONING AND CODE COMPLIANCE. PLAN CHANGES AND REVISIONS, INCLUDING PLANT VARIETY, HARDSCAPE, SEATING, LOCATIONS, SIZES, ETC. MAY BE MADE. A COMPLETE LANDSCAPE AND IRRIGATION PLAN WILL BE SUBMITTED WITH THE BUILDING PERMIT APPLICATION.
- ALL LANDSCAPE AREAS SHALL BE IRRIGATED WITH A PERMANENT UNDERGROUND IRRIGATION SYSTEM. PLANTING AREAS SHALL BE IRRIGATED WITH A COMBINATION OF SURFACE DRIP AND HIGH EFFICIENCY SPRAY. IRRIGATION SYSTEMS SHALL FULLY IRRIGATE PLANT MATERIAL WHILE CONSIDERING PLANT SIZE, LOCATION, SPECIES, AND APPROPRIATE ZONES TO MAXIMIZE EFFICIENT WATER USAGE.
- IRRIGATION CONTROLLER SHALL BE PROGRAMMABLE, EPA WATERSENSE SMART CONTROLLER WITH AUTO-ADJUST CAPABILITIES.
- SOIL SHALL BE AMENDED PRIOR TO PLANTING FOR OPTIMAL HEALTH OF PLANT MATERIAL. SOIL AMENDMENT SPECIFICATIONS WILL BE SUBMITTED WITH BUILDING PERMIT APPLICATION. A SOIL TEST ANALYSIS WILL BE REQUIRED TO DETERMINE APPROPRIATE AMENDMENTS.

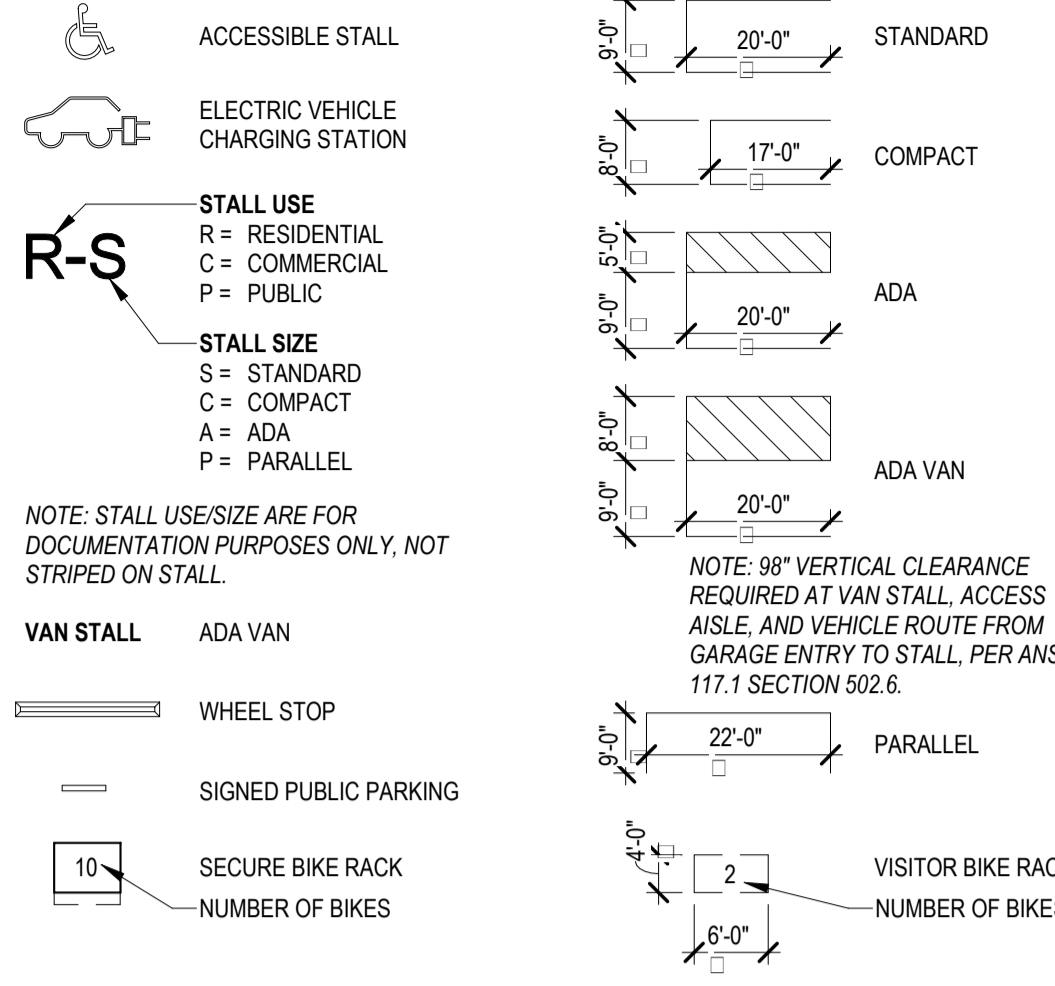


**A1 SCHEMATIC LANDSCAPE LAYOUT PLAN**  
1" = 20'-0"



1/08/2024 SPR REVISED PROJECT AREA

**PARKING LEGEND**



GARAGE PARKING STALLS	
TYPE	COUNT
ACCESSIBLE	5
COMMERCIAL	35
COMPACT 8'-0"	2
COMPACT PARALLEL	74
STANDARD 9'-0"	116
RESIDENTIAL	2
ACCESSIBLE	58
COMPACT PARALLEL	1
STANDARD 9'-0"	77
TOTAL PARKING STALLS	254

BIKE PARKING			
RACK TYPE	RACK COUNT	BIKE COUNT	% TOTAL
FLOOR RACK - 2	7	14	6%
FLOOR RACK - 5	6	30	12%
FLOOR RACK - 10	21	210	83%
TOTAL	34	254	

NOTE: 40% OF ALL PROVIDED PARKING SPACES TO BE PROVIDED WITH SUFFICIENT ELECTRICAL SERVICE CAPACITY, AS DEFINED IN ORS 455.417

**GENERAL FLOOR PLAN NOTES**

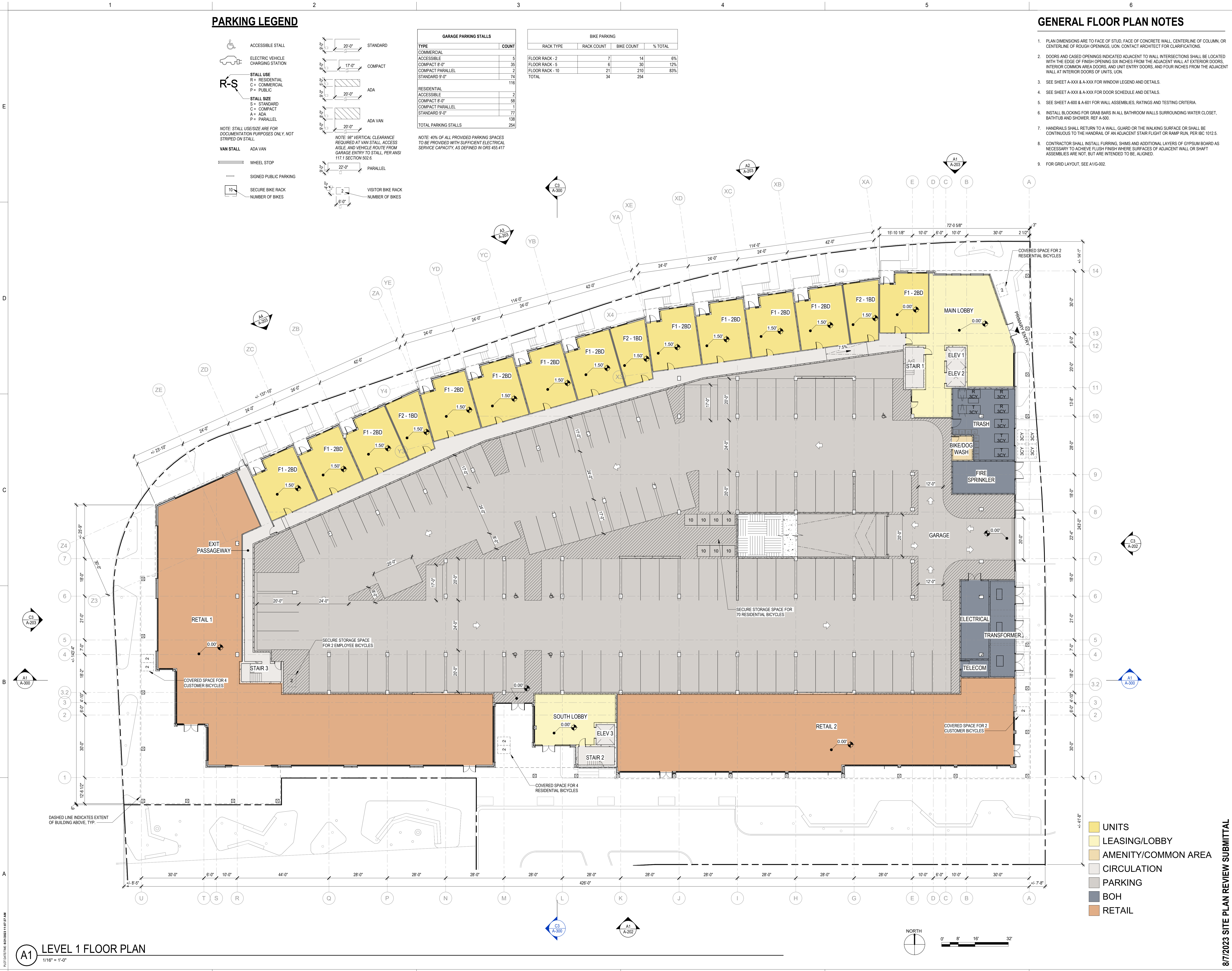
- PLAN DIMENSIONS ARE TO FACE OF STUD. FACE OF CONCRETE WALL, CENTERLINE OF COLUMN, OR CENTERLINE OF ROUGH OPENINGS. UON, CONTACT ARCHITECT FOR CLARIFICATIONS.
- DOORS AND CASED OPENINGS INDICATED ADJACENT TO WALL INTERSECTIONS SHALL BE LOCATED WITH THE EDGE OF FINISH OPENINGS SIX INCHES FROM THE ADJACENT WALL AT EXTERIOR DOORS, INTERIOR COMMON AREA DOORS, AND UNIT ENTRY DOORS, AND FOUR INCHES FROM THE ADJACENT WALL AT INTERIOR DOORS OF UNITS, UON.
- SEE SHEET A-XXX & A-XXX FOR WINDOW LEGEND AND DETAILS.
- SEE SHEET A-XXX & A-XXX FOR DOOR SCHEDULE AND DETAILS.
- SEE SHEET A-600 & A-601 FOR WALL ASSEMBLIES, RATINGS AND TESTING CRITERIA.
- INSTALL BLOCKING FOR GRAB BARS IN ALL BATHROOM WALLS SURROUNDING WATER CLOSET, BATHTUB AND SHOWER, REF A-500.
- HANDRAILS SHALL RETURN TO A WALL, GUARD OR THE WALKING SURFACE OR SHALL BE CONTINUOUS TO THE HANDRAIL OF AN ADJACENT STAIR FLIGHT OR RAMP RUN, PER IBC 1012.5.
- CONTRACTOR SHALL INSTALL FURRING, SHIMS AND ADDITIONAL LAYERS OF GYPSUM BOARD AS NECESSARY TO ACHIEVE FLUSH FINISH WHERE SURFACES OF ADJACENT WALL OR SHAFT ASSEMBLIES ARE NOT, BUT ARE INTENDED TO BE, ALIGNED.
- FOR GRID LAYOUT, SEE A1G-002.



PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**



- UNITS
- LEASING/LOBBY
- AMENITY/Common AREA
- CIRCULATION
- PARKING
- BOH
- RETAIL



MARK	DATE	DESCRIPTION
<b>REVISIONS</b>		

MARK	DATE	DESCRIPTION
B	08/11/2023	SCHEMATIC DESIGN SET
A	08/07/2023	SITE PLAN REVIEW SUBMITTAL

**ISSUE INFORMATION**

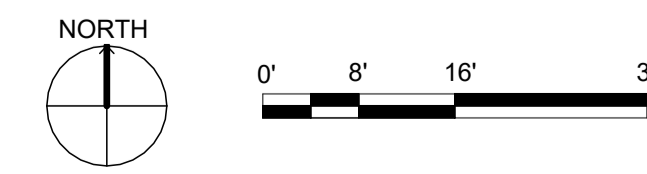
PROJECT NO.: **2022119.01**  
 GGLO PRINCIPAL IN CHARGE:  
 GGLO PROJECT MANAGER:  
 OWNER APPROVAL:

SHEET TITLE  
**OVERALL FLOOR PLAN - LEVEL 1**

SHEET NO.  
**A-111**

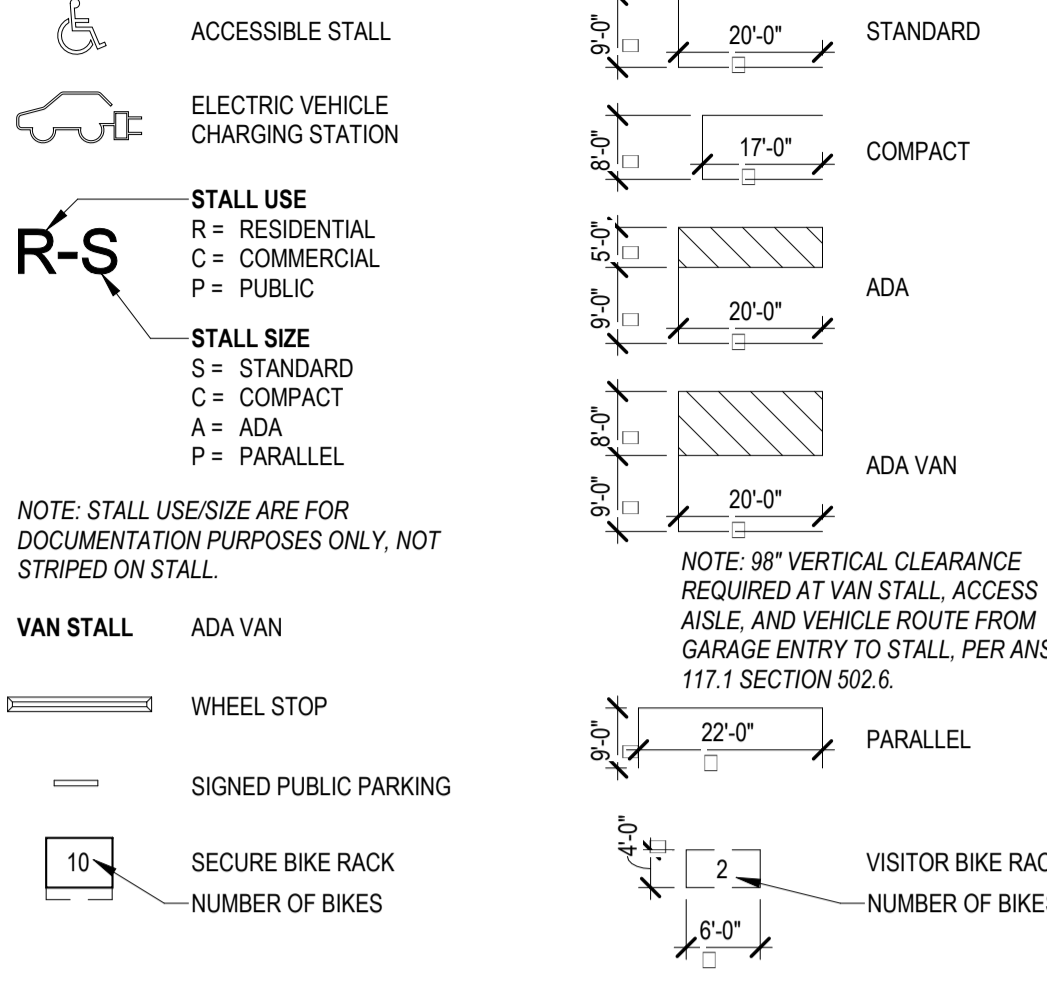
8/7/2023 SITE PLAN REVIEW SUBMITTAL

**A1 LEVEL 1 FLOOR PLAN**  
1/16" = 1'-0"



PROJECT DATE: 08/07/2023 11:07:37 AM

**PARKING LEGEND**



GARAGE PARKING STALLS	
TYPE	COUNT
ACCESSIBLE	5
COMMERCIAL	35
COMPACT 8'-0"	2
COMPACT PARALLEL	74
STANDARD 9'-0"	116
RESIDENTIAL	2
ACCESSIBLE	58
COMPACT PARALLEL	1
STANDARD 9'-0"	77
ADA VAN	138
<b>TOTAL PARKING STALLS</b>	<b>254</b>

BIKE PARKING			
RACK TYPE	RACK COUNT	BIKE COUNT	% TOTAL
FLOOR RACK - 2	7	14	6%
FLOOR RACK - 5	6	30	12%
FLOOR RACK - 10	21	210	83%
<b>TOTAL</b>	<b>34</b>	<b>254</b>	

NOTE: 40% OF ALL PROVIDED PARKING SPACES TO BE PROVIDED WITH SUFFICIENT ELECTRICAL SERVICE CAPACITY, AS DEFINED IN ORS 455.417

NOTE: 10" VERTICAL CLEARANCE REQUIRED AT VAN STALL ACCESS AISLE AND VEHICLE ROUTE FROM GARAGE ENTRY TO STALL, PER ANSII 117.1 SECTION 502.6.

**GENERAL FLOOR PLAN NOTES**

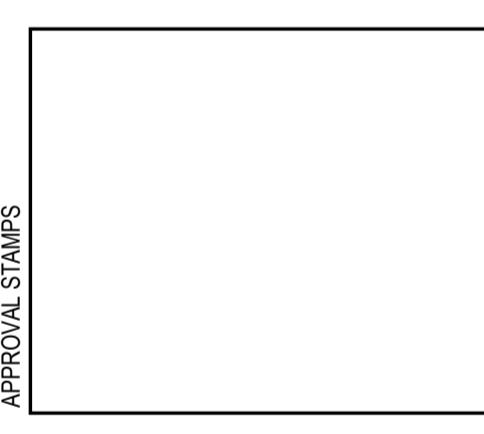
1. PLAN DIMENSIONS ARE TO FACE OF STUD, FACE OF CONCRETE WALL, CENTERLINE OF COLUMN, OR CENTERLINE OF ROUGH OPENINGS, UON. CONTACT ARCHITECT FOR CLARIFICATIONS.
2. DOORS AND CASED OPENINGS INDICATED ADJACENT TO WALL INTERSECTIONS SHALL BE LOCATED WITH THE EDGE OF FINISH OPENINGS SIX INCHES FROM THE ADJACENT WALL AT EXTERIOR DOORS, INTERIOR COMMON AREA DOORS, AND UNIT ENTRY DOORS, AND FOUR INCHES FROM THE ADJACENT WALL AT INTERIOR DOORS OF UNITS, UON.
3. SEE SHEET A-XXX & A-XXX FOR WINDOW LEGEND AND DETAILS.
4. SEE SHEET A-XXX & A-XXX FOR DOOR SCHEDULE AND DETAILS.
5. SEE SHEET A-600 & A-601 FOR WALL ASSEMBLIES, RATINGS AND TESTING CRITERIA.
6. INSTALL BLOCKING FOR GRAB BARS IN ALL BATHROOM WALLS SURROUNDING WATER CLOSET, BATHUB AND SHOWER, REF A-500.
7. HANDRAILS SHALL RETURN TO A WALL, GUARD OR THE WALKING SURFACE OR SHALL BE CONTINUOUS TO THE HANDRAIL OF AN ADJACENT STAIR FLIGHT OR RAMP RUN, PER BC 1012.5.
8. CONTRACTOR SHALL INSTALL FURRING, SHIMS AND ADDITIONAL LAYERS OF GYPSUM BOARD AS NECESSARY TO ACHIEVE FLUSH FINISH WHERE SURFACES OF ADJACENT WALL OR SHAFT ASSEMBLIES ARE NOT, BUT ARE INTENDED TO BE, ALIGNED.
9. FOR GRID LAYOUT, SEE A1G-002.



PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**



MARK	DATE	DESCRIPTION
<b>REVISIONS</b>		

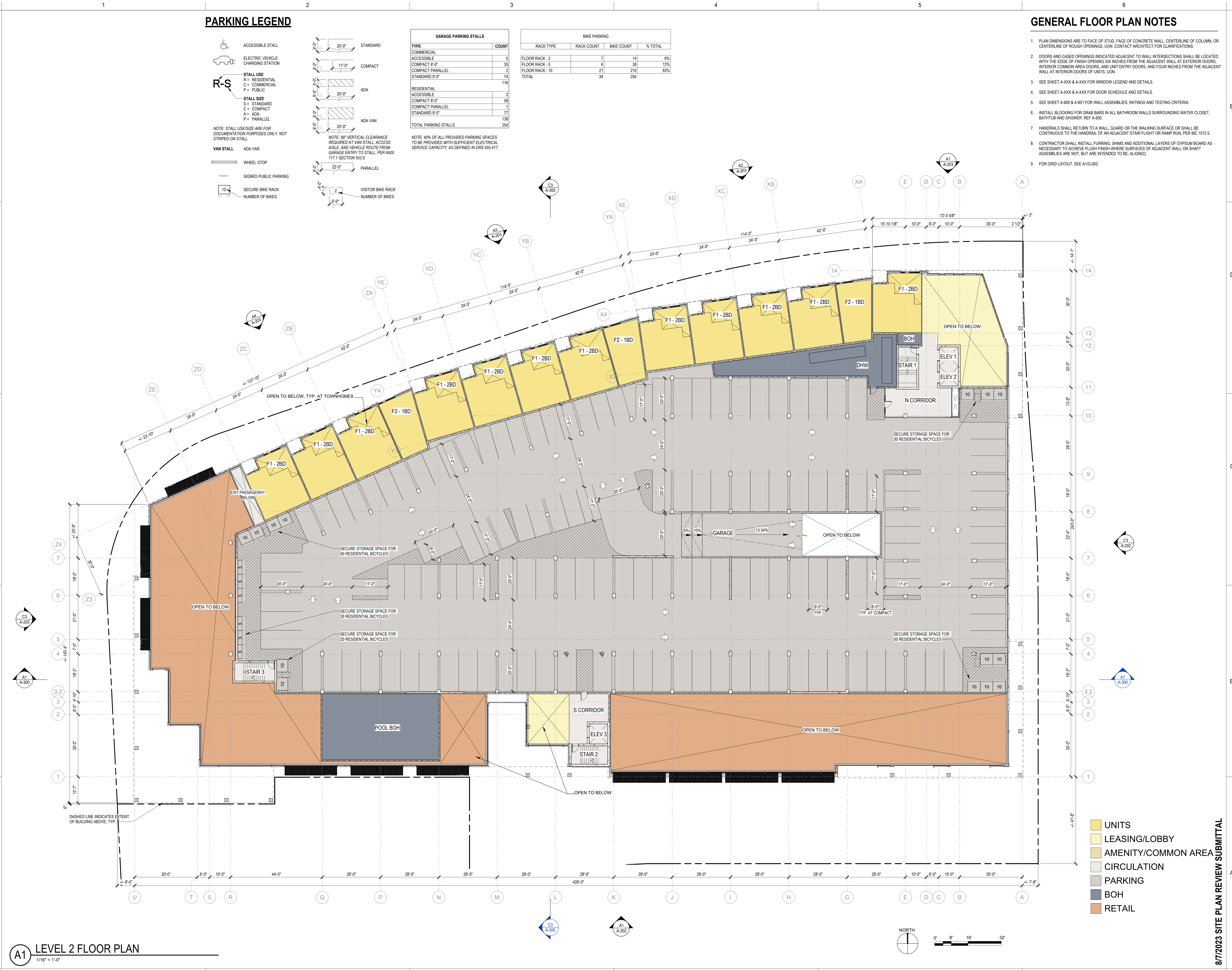
MARK	DATE	DESCRIPTION
B	08/11/2023	SCHEMATIC DESIGN SET
A	08/07/2023	SITE PLAN REVIEW SUBMITTAL

PROJECT NO.: **2022119.01**  
 GGLO PRINCIPAL IN CHARGE:  
 GGLO PROJECT MANAGER:  
 OWNER APPROVAL:

SHEET TITLE:  
**OVERALL FLOOR PLAN -  
LEVEL 2**

SHEET NO.:  
**A-112**

COPYRIGHT GGLO. ALL RIGHTS RESERVED. ORIGINAL SHEET SIZE 8 3/4" X 11"



- UNITS
- LEASING/LOBBY
- AMENITY/Common AREA
- CIRCULATION
- PARKING
- BOH
- RETAIL



**A1 LEVEL 2 FLOOR PLAN**  
1/16" = 1'-0"

8/7/2023 SITE PLAN REVIEW SUBMITTAL

**GENERAL FLOOR PLAN NOTES**

1. PLAN DIMENSIONS ARE TO FACE OF STUD, FACE OF CONCRETE WALL, CENTERLINE OF COLUMN, OR CENTERLINE OF ROUGH OPENINGS, UON. CONTACT ARCHITECT FOR CLARIFICATIONS.
2. DOORS AND CASED OPENINGS INDICATED ADJACENT TO WALL INTERSECTIONS SHALL BE LOCATED WITH THE EDGE OF FINISH OPENINGS SIX INCHES FROM THE ADJACENT WALL AT EXTERIOR DOORS, INTERIOR COMMON AREA DOORS, AND UNIT ENTRY DOORS, AND FOUR INCHES FROM THE ADJACENT WALL AT INTERIOR DOORS OF UNITS, UON.
3. SEE SHEET A-XXX & A-XXX FOR WINDOW LEGEND AND DETAILS.
4. SEE SHEET A-XXX & A-XXX FOR DOOR SCHEDULE AND DETAILS.
5. SEE SHEET A-600 & A-601 FOR WALL ASSEMBLIES, RATINGS AND TESTING CRITERIA.
6. INSTALL BLOCKING FOR GRAB BARS IN ALL BATHROOM WALLS SURROUNDING WATER CLOSET, BATHTUB AND SHOWER, REF A-500.
7. HANDRAILS SHALL RETURN TO A WALL, GUARD OR THE WALKING SURFACE OR SHALL BE CONTINUOUS TO THE HANDRAIL OF AN ADJACENT STAIR FLIGHT OR RAMP RUN, PER IBC 1012.5.
8. CONTRACTOR SHALL INSTALL FURRING, SHIMS AND ADDITIONAL LAYERS OF GYPSUM BOARD AS NECESSARY TO ACHIEVE FLUSH FINISH WHERE SURFACES OF ADJACENT WALL OR SHAFT ASSEMBLIES ARE NOT, BUT ARE INTENDED TO BE, ALIGNED.
9. FOR GRID LAYOUT, SEE A1G-002.

PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**

APPROVAL STAMPS

MARK DATE DESCRIPTION  
**REVISIONS**

B 08/11/2023 SCHEMATIC DESIGN SET  
A 08/07/2023 SITE PLAN REVIEW SUBMITTAL

MARK DATE DESCRIPTION  
**ISSUE INFORMATION**

PROJECT NO.: **2022119.01**  
GGLO PRINCIPAL IN CHARGE:  
GGLO PROJECT MANAGER:  
OWNER APPROVAL:

SHEET TITLE  
**OVERALL FLOOR PLAN -  
LEVEL 3**

SHEET NO.  
**A-113**

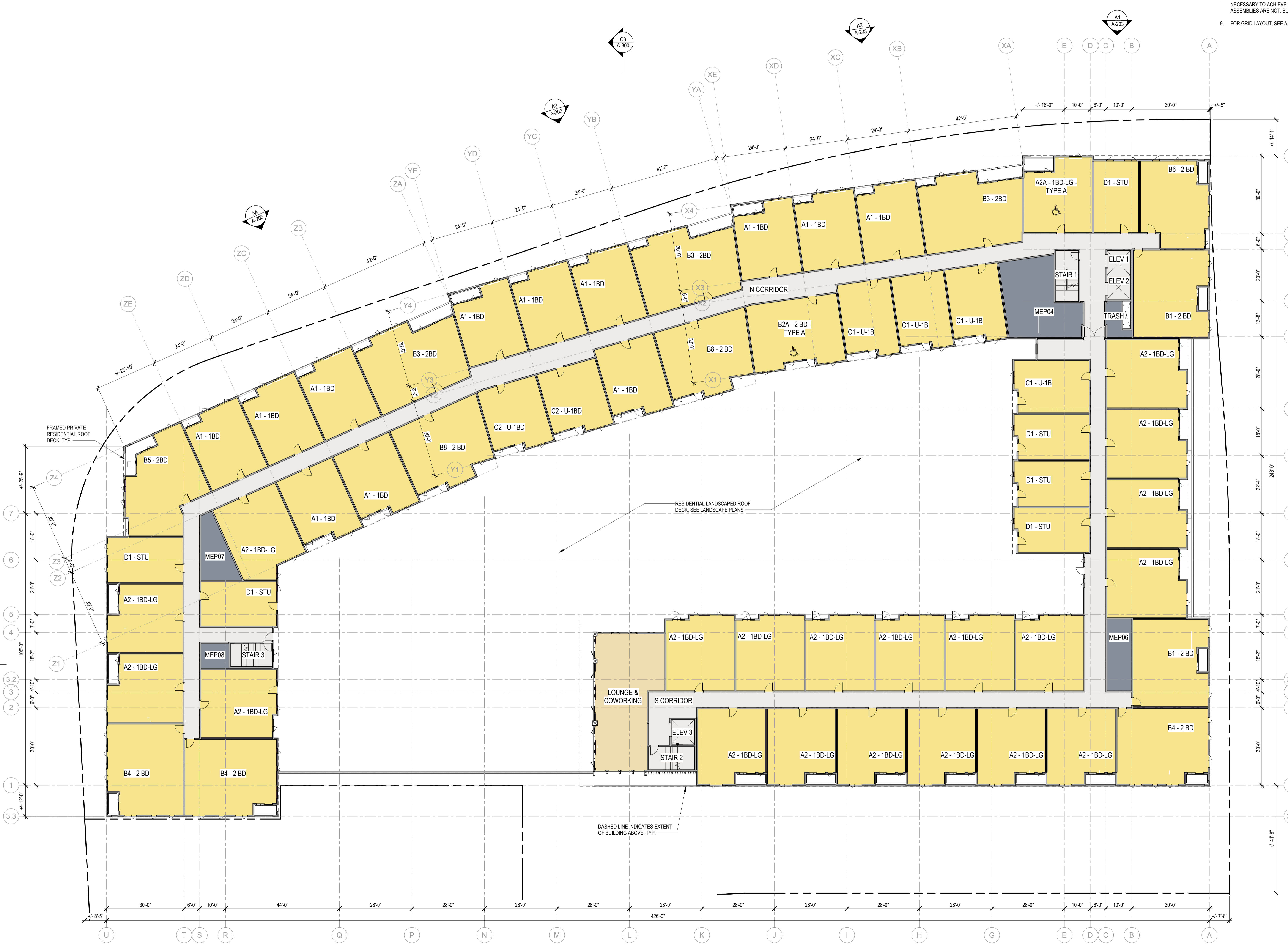
COPYRIGHT GGLO. ALL RIGHTS RESERVED.  
ORIGINAL SHEET SIZE 8.5X11

E  
D  
C  
B  
A

**(A1) LEVEL 3 FLOOR PLAN**  
1/16" = 1'-0"

PROJECT DATE/TIME: 8/10/2023 12:43:57 PM

1 2 3 4 5 6



**LEGEND**

- UNITS
- LEASING/LOBBY
- AMENITY/Common AREA
- CIRCULATION
- PARKING
- BOH
- RETAIL



8/7/2023 SITE PLAN REVIEW SUBMITTAL

**GENERAL FLOOR PLAN NOTES**

1. PLAN DIMENSIONS ARE TO FACE OF STUD, FACE OF CONCRETE WALL, CENTERLINE OF COLUMN, OR CENTERLINE OF ROUGH OPENINGS, UON. CONTACT ARCHITECT FOR CLARIFICATIONS.
2. DOORS AND CASED OPENINGS INDICATED ADJACENT TO WALL INTERSECTIONS SHALL BE LOCATED WITH THE EDGE OF FINISH OPENINGS SIX INCHES FROM THE ADJACENT WALL AT EXTERIOR DOORS, INTERIOR COMMON AREA DOORS, AND UNIT ENTRY DOORS, AND FOUR INCHES FROM THE ADJACENT WALL AT INTERIOR DOORS OF UNITS, UON.
3. SEE SHEET A-XXX & A-XXX FOR WINDOW LEGEND AND DETAILS.
4. SEE SHEET A-XXX & A-XXX FOR DOOR SCHEDULE AND DETAILS.
5. SEE SHEET A-600 & A-601 FOR WALL ASSEMBLIES, RATINGS AND TESTING CRITERIA.
6. INSTALL BLOCKING FOR GRAB BARS IN ALL BATHROOM WALLS SURROUNDING WATER CLOSET, BATHTUB AND SHOWER, REF A-500.
7. HANDRAILS SHALL RETURN TO A WALL, GUARD OR THE WALKING SURFACE OR SHALL BE CONTINUOUS TO THE HANDRAIL OF AN ADJACENT STAIR FLIGHT OR RAMP RUN, PER IBC 1012.5.
8. CONTRACTOR SHALL INSTALL FURRING, SHIMS AND ADDITIONAL LAYERS OF GYPSUM BOARD AS NECESSARY TO ACHIEVE FLUSH FINISH WHERE SURFACES OF ADJACENT WALL OR SHAFT ASSEMBLIES ARE NOT, BUT ARE INTENDED TO BE, ALIGNED.
9. FOR GRID LAYOUT, SEE A1G-002.

PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**

APPROVAL STAMPS

MARK DATE DESCRIPTION

**REVISIONS**

B 08/11/2023 SCHEMATIC DESIGN SET

A 08/07/2023 SITE PLAN REVIEW SUBMITTAL

MARK DATE DESCRIPTION

**ISSUE INFORMATION**

PROJECT NO.: **2022119.01**

GGLO PRINCIPAL IN CHARGE:

GGLO PROJECT MANAGER:

OWNER APPROVAL:

SHEET TITLE

**OVERALL FLOOR PLAN -  
LEVEL 4**

SHEET NO.

**A-114**

COPYRIGHT GGLO. ALL RIGHTS RESERVED.  
ORIGINAL SHEET SIZE 8 3/4" X 11"



**A1 LEVEL 4 FLOOR PLAN**  
1/16" = 1'-0"

**8/7/2023 SITE PLAN REVIEW SUBMITTAL**

**GENERAL FLOOR PLAN NOTES**

1. PLAN DIMENSIONS ARE TO FACE OF STUD, FACE OF CONCRETE WALL, CENTERLINE OF COLUMN, OR CENTERLINE OF ROUGH OPENINGS, UON. CONTACT ARCHITECT FOR CLARIFICATIONS.
2. DOORS AND CASED OPENINGS INDICATED ADJACENT TO WALL INTERSECTIONS SHALL BE LOCATED WITH THE EDGE OF FINISH OPENINGS SIX INCHES FROM THE ADJACENT WALL AT EXTERIOR DOORS, INTERIOR COMMON AREA DOORS, AND UNIT ENTRY DOORS, AND FOUR INCHES FROM THE ADJACENT WALL AT INTERIOR DOORS OF UNITS, UON.
3. SEE SHEET A-XXX & A-XXX FOR WINDOW LEGEND AND DETAILS.
4. SEE SHEET A-XXX & A-XXX FOR DOOR SCHEDULE AND DETAILS.
5. SEE SHEET A-600 & A-601 FOR WALL ASSEMBLIES, RATINGS AND TESTING CRITERIA.
6. INSTALL BLOCKING FOR GRAB BARS IN ALL BATHROOM WALLS SURROUNDING WATER CLOSET, BATHTUB AND SHOWER, REF A-500.
7. HANDRAILS SHALL RETURN TO A WALL, GUARD OR THE WALKING SURFACE OR SHALL BE CONTINUOUS TO THE HANDRAIL OF AN ADJACENT STAIR FLIGHT OR RAMP RUN, PER IBC 1012.5.
8. CONTRACTOR SHALL INSTALL FURRING, SHIMS AND ADDITIONAL LAYERS OF GYPSUM BOARD AS NECESSARY TO ACHIEVE FLUSH FINISH WHERE SURFACES OF ADJACENT WALL OR SHAFT ASSEMBLIES ARE NOT, BUT ARE INTENDED TO BE, ALIGNED.
9. FOR GRID LAYOUT, SEE A1G-002.

PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**

APPROVAL STAMPS

MARK DATE DESCRIPTION  
**REVISIONS**

B 08/11/2023 SCHEMATIC DESIGN SET

A 08/07/2023 SITE PLAN REVIEW SUBMITTAL

MARK DATE DESCRIPTION

**ISSUE INFORMATION**

PROJECT NO.: **2022119.01**

GGLO PRINCIPAL IN CHARGE:

GGLO PROJECT MANAGER:

OWNER APPROVAL:

SHEET TITLE  
**OVERALL FLOOR PLAN -  
LEVEL 5**

SHEET NO.

**A-115**

COPYRIGHT GGLO. ALL RIGHTS RESERVED.  
ORIGINAL SHEET SIZE IS 36"x42"



**A1 LEVEL 5 FLOOR PLAN**  
1/16" = 1'-0"



8/7/2023 SITE PLAN REVIEW SUBMITTAL



**GENERAL FLOOR PLAN NOTES**

1. PLAN DIMENSIONS ARE TO FACE OF STUD, FACE OF CONCRETE WALL, CENTERLINE OF COLUMN, OR CENTERLINE OF ROUGH OPENINGS, UON. CONTACT ARCHITECT FOR CLARIFICATIONS.
2. DOORS AND CASED OPENINGS INDICATED ADJACENT TO WALL INTERSECTIONS SHALL BE LOCATED WITH THE EDGE OF FINISH OPENINGS SIX INCHES FROM THE ADJACENT WALL AT EXTERIOR DOORS, INTERIOR COMMON AREA DOORS, AND UNIT ENTRY DOORS, AND FOUR INCHES FROM THE ADJACENT WALL AT INTERIOR DOORS OF UNITS, UON.
3. SEE SHEET A-XXX & A-XXX FOR WINDOW LEGEND AND DETAILS.
4. SEE SHEET A-XXX & A-XXX FOR DOOR SCHEDULE AND DETAILS.
5. SEE SHEET A-600 & A-601 FOR WALL ASSEMBLIES, RATINGS AND TESTING CRITERIA.
6. INSTALL BLOCKING FOR GRAB BARS IN ALL BATHROOM WALLS SURROUNDING WATER CLOSET, BATHTUB AND SHOWER, REF A-500.
7. HANDRAILS SHALL RETURN TO A WALL, GUARD OR THE WALKING SURFACE OR SHALL BE CONTINUOUS TO THE HANDRAIL OF AN ADJACENT STAIR FLIGHT OR RAMP RUN, PER IBC 1012.5.
8. CONTRACTOR SHALL INSTALL FURRING, SHIMS AND ADDITIONAL LAYERS OF GYPSUM BOARD AS NECESSARY TO ACHIEVE FLUSH FINISH WHERE SURFACES OF ADJACENT WALL OR SHAFT ASSEMBLIES ARE NOT, BUT ARE INTENDED TO BE, ALIGNED.
9. FOR GRID LAYOUT, SEE A1G-002.

**GGLO**

SEATTLE | LOS ANGELES | BOISE  
gglo.com

PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**

APPROVAL STAMPS

MARK DATE DESCRIPTION

**REVISIONS**

MARK DATE DESCRIPTION

**ISSUE INFORMATION**

B 08/11/2023 SCHEMATIC DESIGN SET

A 08/07/2023 SITE PLAN REVIEW SUBMITTAL

MARK DATE DESCRIPTION

**ISSUE INFORMATION**

PROJECT NO.: **2022119.01**

GGLO PRINCIPAL IN CHARGE:

GGLO PROJECT MANAGER:

OWNER APPROVAL:

SHEET TITLE

**OVERALL FLOOR PLAN -**

**LEVEL 6**

SHEET NO.

**A-116**

8/7/2023 SITE PLAN REVIEW SUBMITTAL

COPYRIGHT GGLO. ALL RIGHTS RESERVED.

ORIGINAL SHEET SIZE 8 3/4" X 11"



**A1 LEVEL 6 FLOOR PLAN**

1/16" = 1'-0"

8/7/2023 SITE PLAN REVIEW SUBMITTAL

### GENERAL ROOF PLAN NOTES

1. SEE DETAIL XX/A-XXX FOR VENT PIPE PENETRATIONS.
2. SEE XX/A-XXX FOR SATELLITE CONDUIT.
3. PLACE FALL PROTECTION ANCHORS AT SPECIFIED INTERVALS PER MFR INSTRUCTIONS. SEE PROJECT MANUAL SECTION XXXXX.
4. FOR GRID LAYOUT, SEE A1G-002.

PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
 BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
 151 SOUTH EL CAMINO DRIVE  
 BEVERLY HILLS, CA 90212**

APPROVAL STAMPS

MARK DATE DESCRIPTION  
**REVISIONS**

MARK	DATE	DESCRIPTION

A 08/07/2023 SITE PLAN REVIEW SUBMITTAL

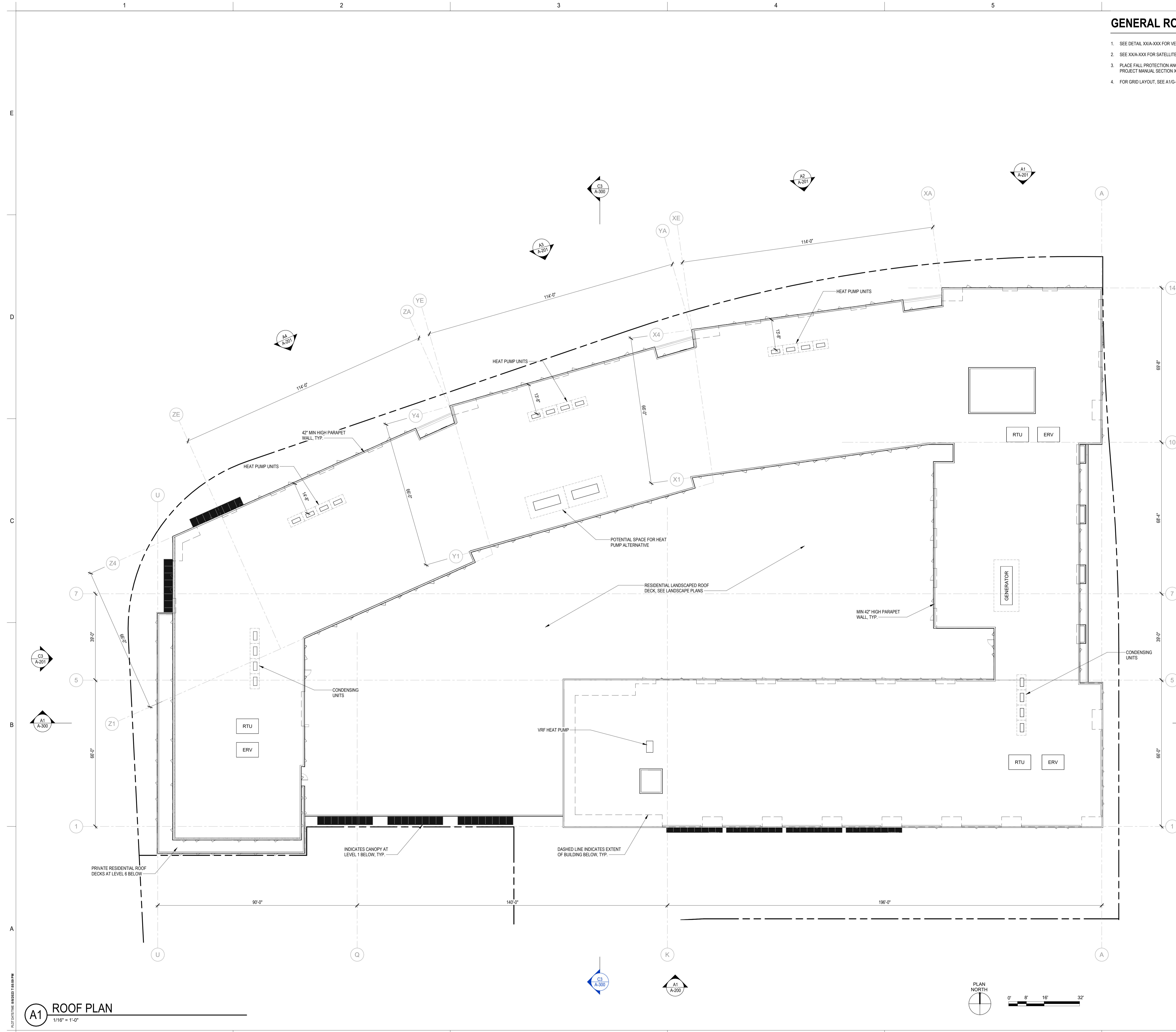
MARK DATE DESCRIPTION  
**ISSUE INFORMATION**

PROJECT NO: **2022119.01**  
 GGLO PRINCIPAL IN CHARGE:  
 GGLO PROJECT MANAGER:  
 OWNER APPROVAL:

SHEET TITLE  
**OVERALL ROOF PLAN**

SHEET NO.  
**A-117**

**8/7/2023 SITE PLAN REVIEW SUBMITTAL**



**(A1) ROOF PLAN**  
 1/16" = 1'-0"

PROJECT DATE/TIME: 08/07/2023 7:58:39 PM

**GENERAL EXTERIOR ELEVATION NOTES**

1. LOCATE EXHAUST VENTS 3 FT MINIMUM FROM DOORS AND OPERABLE PORTIONS OF WINDOWS.
2. SEE RCP FOR SOFFIT COLORS.
3. FINAL MATERIALS AND COLORS SUBJECT TO CHANGE, CONSISTENT WITH BDC 2.7.4750 DESIGN STANDARDS.
4. FINAL BALCONY COUNT SUBJECT TO INCREASE, CONSISTENT WITH BDC 2.7.4750 DESIGN STANDARDS.

PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**

APPROVAL STAMPS

MARK	DATE	DESCRIPTION
<b>REVISIONS</b>		

MARK	DATE	DESCRIPTION
B	08/11/2023	SCHEMATIC DESIGN SET
A	08/07/2023	SITE PLAN REVIEW SUBMITTAL

ISSUE INFORMATION

PROJECT NO.: **2022119.01**  
GGLO PRINCIPAL IN CHARGE:  
GGLO PROJECT MANAGER:  
OWNER APPROVAL:

SHEET TITLE  
**OVERALL EXTERIOR  
ELEVATIONS**

SHEET NO.  
**A-200**



**C3 EAST ELEVATION / SW EVERPINE STREET**  
1/16" = 1'-0"



**A1 SOUTH ELEVATION**  
1/16" = 1'-0"

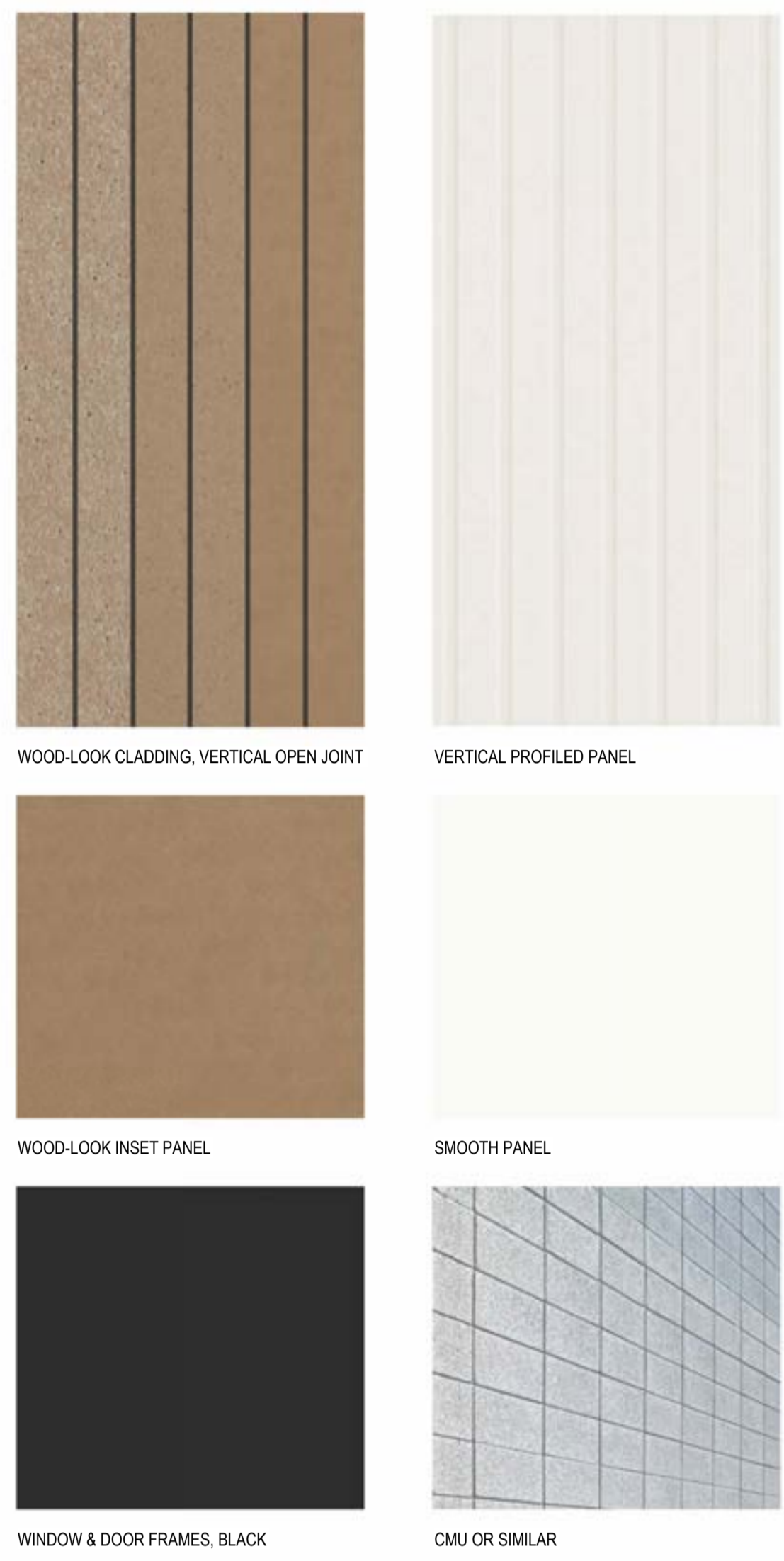
**GENERAL EXTERIOR ELEVATION NOTES**

1. LOCATE EXHAUST VENTS 3 FT MINIMUM FROM DOORS AND OPERABLE PORTIONS OF WINDOWS.
2. SEE RCP FOR SOFFIT COLORS.
3. FINAL MATERIALS AND COLORS SUBJECT TO CHANGE, CONSISTENT WITH BDC 2.7.4750 DESIGN STANDARDS.
4. FINAL BALCONY COUNT SUBJECT TO INCREASE, CONSISTENT WITH BDC 2.7.4750 DESIGN STANDARDS.

PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

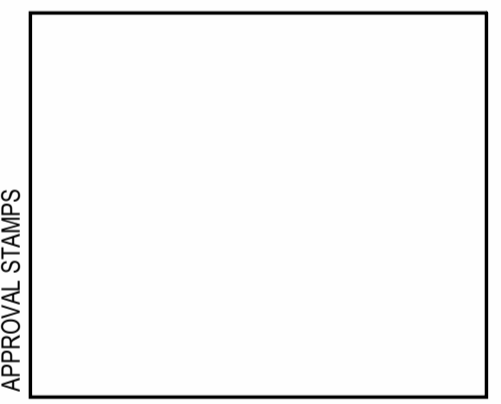
OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**



**C3 WEST ELEVATION / SW BOND STREET**  
1/16" = 1'-0"



**A1 NORTH ELEVATION / SW INDUSTRIAL WAY**  
1/16" = 1'-0"



MARK	DATE	DESCRIPTION
<b>REVISIONS</b>		

MARK	DATE	DESCRIPTION
B	08/11/2023	SCHEMATIC DESIGN SET
A	08/07/2023	SITE PLAN REVIEW SUBMITTAL

**ISSUE INFORMATION**

PROJECT NO.: **2022119.01**  
GGLO PRINCIPAL IN CHARGE:  
GGLO PROJECT MANAGER:  
OWNER APPROVAL:

**OVERALL EXTERIOR ELEVATIONS**

SHEET NO.  
**A-201**

8/7/2023 SITE PLAN REVIEW SUBMITTAL

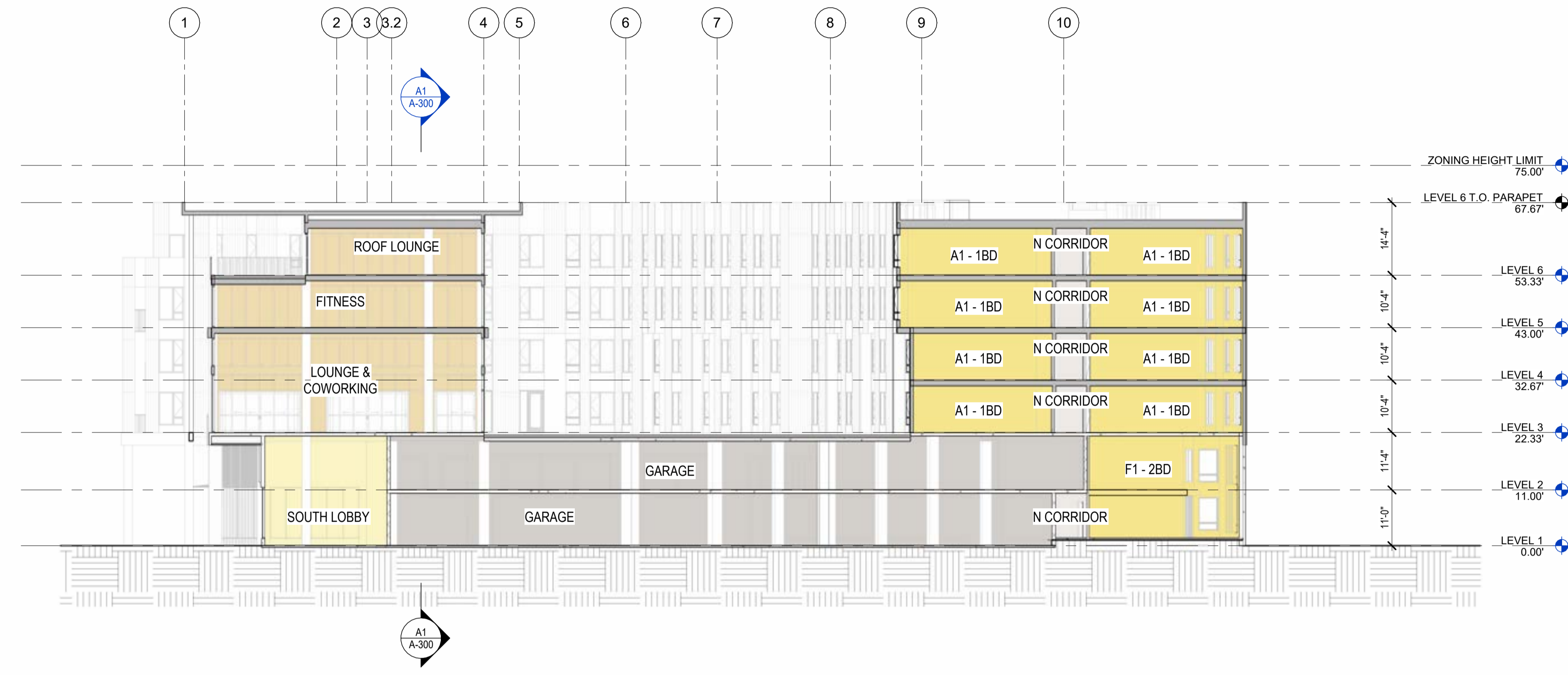
**GENERAL BUILDING SECTION NOTES**

1. SEE SHEET A-601 FOR WALL ASSEMBLIES.
2. SEE SHEET A-605 FOR FLOOR, CEILING, SOFFIT AND ROOF ASSEMBLIES.
3. ALL FLOORS ARE F-XX UON.

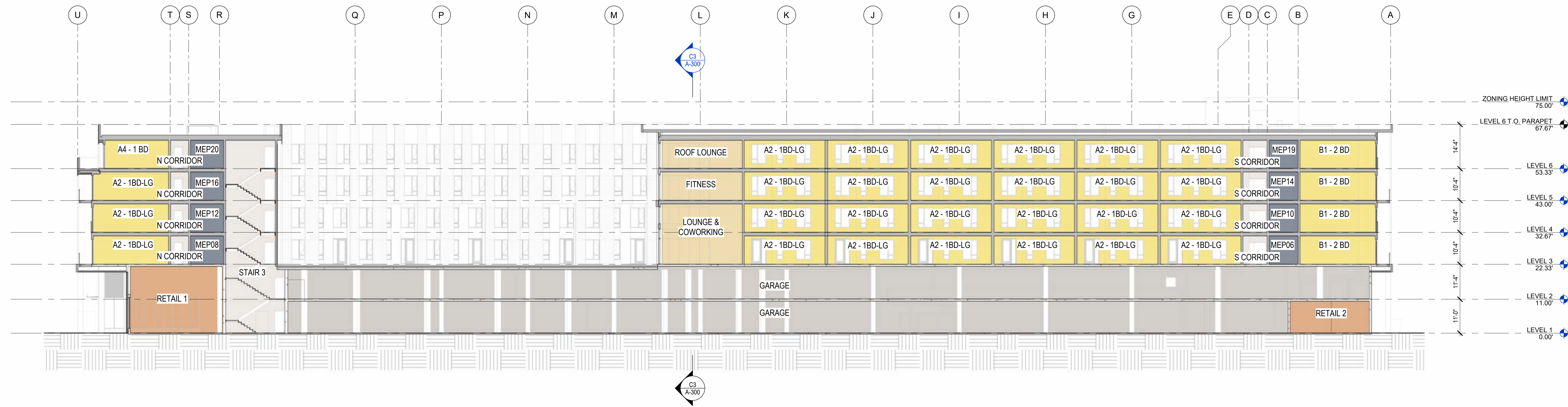
PROJECT:  
**TIMBER YARDS - LOT 1**

PROJECT ADDRESS:  
**175 SW INDUSTRIAL WAY  
BEND, OR 97702**

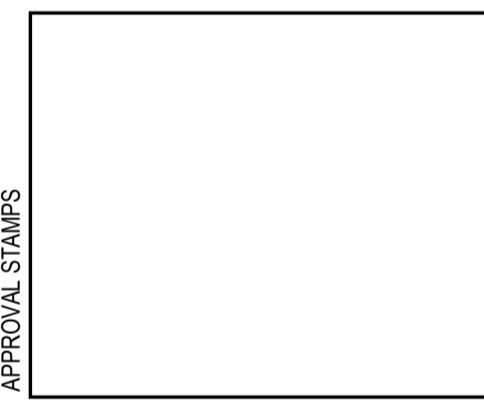
OWNER:  
**KENNEDY WILSON  
151 SOUTH EL CAMINO DRIVE  
BEVERLY HILLS, CA 90212**



**C3 NORTH-SOUTH BUILDING SECTION**  
1/16" = 1'-0"



**A1 EAST-WEST BUILDING SECTION 1**  
1/16" = 1'-0"



MARK	DATE	DESCRIPTION
<b>REVISIONS</b>		

MARK	DATE	DESCRIPTION
<b>ISSUE INFORMATION</b>		

PROJECT NO.: **2022119.01**  
GGLO PRINCIPAL IN CHARGE:  
GGLO PROJECT MANAGER:  
OWNER APPROVAL:

SHEET TITLE  
**OVERALL BUILDING  
SECTIONS**

SHEET NO.  
**A-300**

8/7/2023 SITE PLAN REVIEW SUBMITTAL



BOARD OF COMMISSIONERS

AGENDA REQUEST & STAFF REPORT

**MEETING DATE:** March 27, 2024

**SUBJECT:** Planning Commissioner Appointment and Reappointment

**BACKGROUND AND POLICY IMPLICATIONS:**

The Board of County Commissioners will consider appointing a person for an at-large Planning Commission position on March 27. The term runs through June 30, 2027. There is also an opportunity for the Board to reappoint the Planning Commissioner representing the Bend area to a second four-year term, starting on July 1, 2024.

**BUDGET IMPACTS:**

None

**ATTENDANCE:**

Peter Gutowsky, CDD Director



COMMUNITY DEVELOPMENT

MEMORANDUM

**TO:** Deschutes County Board of Commissioners

**FROM:** Peter Gutowsky, AICP, Director

**DATE:** March 20, 2024

**SUBJECT:** Planning Commissioner Appointment and Reappointment

The Board of County Commissioners (Board) will consider appointing a person for an at-large Planning Commission position on March 27. The term runs through June 30, 2027. There is also an opportunity for the Board to reappoint the Planning Commissioner representing the Bend area to a second four-year term, starting on July 1, 2024.

**I. BACKGROUND**

The Community Development Department (CDD) initiated a one-month recruitment process in February for an at-large Planning Commissioner vacancy. Twelve candidates applied. After coordinating with the Board individually, five will be interviewed on March 22. Toni Williams, Planning Commissioner Chair and Jessica Kieras, Vice Chair will participate with me in one of three panels. Each will be paired with a county commissioner.

Susan Altman will complete her first four-year term as a Planning Commissioner representing the Bend area on June 30, 2024. She recently expressed interest in serving a second term at the pleasure of the Board. Her standing on the Planning Commission is excellent. Last year, she was the vice-chair.



BOARD OF COMMISSIONERS

AGENDA REQUEST & STAFF REPORT

MEETING DATE: March 27, 2024

SUBJECT: COHC Engaging Communities and Schools in Substance Misuse and Overdose Prevention Grant Application

RECOMMENDED MOTION:

Move approval to apply for the COHC Engaging Communities and Schools in Substance Misuse and Overdose Prevention Grant.

BACKGROUND AND POLICY IMPLICATIONS:

Deschutes County Health Services (DCHS) seeks approval to apply for a \$125,000 Central Oregon Health Council (COHC) Engaging Communities and Schools in Substance Misuse and Overdose Prevention Grant. This grant opportunity would support initiatives that engage students, communities, and various stakeholders in effective substance misuse prevention efforts. The goal is to create a multi-faceted approach that goes beyond traditional harm reduction strategies, focusing on preventative messaging, community dialogue, and reducing the stigma surrounding substance use disorders (SUD) and naloxone use. Awards can range from \$25,000 to \$125,000 and funding can be spent over multiple years.

DCHS's Prevention and Health Promotion (PHP) Program proposes to use any grant funds awarded to continue operations of the UpShift program. UpShift was designed by PHP to improve the ways schools approach students who are using substances by ensuring appropriate prevention and intervention strategies. UpShift is designed to actively engage with students who are using substances to help them adopt healthy behaviors and stay in school. The program also serves to increase student and guardian knowledge of substance use risks and to enhance supportive networks within the school community.

The UpShift program is offered to all students who engage in substance use and aims to help them identify the root cause(s) of their behavior. Students in the program are evaluated to determine their level of risk and then referred for appropriate intervention.

If awarded, DCHS intends to use all funding to help sustain the existing regular, 1.0 FTE Community Health Specialist II (CHSII). The CHSII position oversees UpShift implementation in all three school districts in Deschutes County. The position is currently funded by OHA



Program Element (PE) 36, Alcohol and Drug Prevention and Education Program (ADPEP). OHA, PE 36 funding allocations have not increased for several years and are not sufficient to maintain the 1.0 FTE. The Department seeks to use funding from this grant to support the position through FY27.

**BUDGET IMPACTS:**

If awarded, \$125,000 revenue for the term July 1, 2025 through June 30, 2027.

Because this COHC grant opportunity does not allow for indirect costs, DCHS will consider options to address the shortfall created in FY26 and 27 budgets—this may include reprioritization of current resources or reduction of FTE.

**ATTENDANCE:**

Jessica Jacks, Manager, Public Health Program  
Heather Tang, Substance Misuse Prevention Strategist



BOARD OF COMMISSIONERS

AGENDA REQUEST & STAFF REPORT

MEETING DATE: March 27, 2024

SUBJECT: Acceptance of two Central Oregon Health Council Behavioral Health Surplus Funds Grants

RECOMMENDED MOTIONS:

- 1) Move approval of Document Nos. 2024-264 and 2024-265, accepting Central Oregon Health Council Surplus Funds grants.
2) Move approval of Board Order No. 2024-011, designating signing authority to Janice Garceau.
3) Move approval of Resolution No. 2024-008 extending 1.0 limited duration FTE from June 30, 2024 to June 30, 2025.

BACKGROUND AND POLICY IMPLICATIONS:

Deschutes County Health Services (DCHS) seeks approval to accept two Central Oregon Health Council (COHC) Behavioral Health Surplus Fund Grants which together total \$1,101,984, and authorization to extend 1.0 limited duration FTE from June 30, 2024, to June 30, 2025. Additionally, approval of a Board Order is requested to authorize Janice Garceau, Health Services Director, to sign the letters of agreement which must be signed electronically on the COHC grant platform. The two grants are described in detail below.

Older Adults grant for \$484,484: DCHS intends to use the Older Adults grant to continue services to a population of vulnerable older adults living with mental health and substance use disorders. The funds will allow DCHS to provide case management, caregiver training and other supports not typically covered by Medicare, as well as pre-treatment outreach and engagement services not eligible for reimbursement. Funding will support the extension of one limited duration Behavioral Health Specialist I position, #2906, on the Older Adults Team from June 30, 2024 to June 30, 2025.

Stabilization Center grant for \$617,500: A critical service provided at the County's Stabilization Center (DCSC) is 23-hour respite which relies on 24/7 operations. This service is not covered by Medicaid and is essential to keeping Medicaid individuals out of higher levels of care such as the Emergency Department or jail. To date, more than 800 individuals have received respite with an average stay of 10 hours per individual. Approximately 56%

of those served at the DCSC are Medicaid members. DCHS intends to use these grant funds for uncovered costs associated with 23-hour respite for Medicaid members.

**BUDGET IMPACTS:**

\$1,101,984 revenue for July 1, 2024 to June 30, 2025. These funds and expenditures will be included in the FY25 proposed budget.

**ATTENDANCE:**

- Janice Garceau, Health Services Director
- Holly Harris, Director Behavioral Health
- Dan Emerson, Budget & Financial Planning Manager

REVIEWED  
\_\_\_\_\_  
LEGAL COUNSEL

03/27/2024 Item #7.

For Recording Stamp Only

BEFORE THE BOARD OF COUNTY COMMISSIONERS OF DESCHUTES COUNTY, OREGON

An Order designating Janice Garceau, Director,  
Health Services, as the Deschutes County  
Representative for the purpose of signing the  
Central Oregon Health Council (COHC) Letters  
of Agreement for the 2024 Surplus Funds grant.

ORDER NO. 2024-011

WHEREAS, the Board of County Commissioners of Deschutes County has authorized the acceptance of COHC grant funds in the amount of \$1,101,984; and

WHEREAS, in order to receive the funds, the Letters of Agreement must be signed electronically on the COHC grant system; now, therefore,

THE BOARD OF COUNTY COMMISSIONERS OF DESCHUTES COUNTY, OREGON, HEREBY ORDERS as follows:

Section 1. Janice Garceau, Director, Health Services, is designated as the Deschutes County representative for the purpose of signing the Central Oregon Health Council Letters of Agreement for the 2024 Surplus Funds grant.

Dated this \_\_\_\_\_ of \_\_\_\_\_, 20\_\_

BOARD OF COUNTY COMMISSIONERS  
OF DESCHUTES COUNTY, OREGON

\_\_\_\_\_  
PATTI ADAIR, Chair

\_\_\_\_\_  
ANTHONY DeBONE, Vice Chair

ATTEST:

\_\_\_\_\_  
Recording Secretary

\_\_\_\_\_  
PHIL CHANG, Commissioner

REVIEWED  
\_\_\_\_\_  
LEGAL COUNSEL

For Recording Stamp Only

BEFORE THE BOARD OF COUNTY COMMISSIONERS OF DESCHUTES COUNTY,  
OREGON

A Resolution Extending \*  
FTE \* RESOLUTION NO. 2024-008  
\*

WHEREAS, Health Services presented to the Board of County Commissioners on 3/27/24, with regards to the Central Oregon Health Council Surplus Funds grant along with the extension of 1.00 limited duration FTE position, and

WHEREAS, Deschutes County Policy HR-1 requires that the creation of or increase in FTE outside the adopted budget be approved by the Board of County Commissioners; now, therefore,

BE IT RESOLVED BY THE BOARD OF COUNTY COMMISSIONERS OF DESCHUTES COUNTY, OREGON, as follows:

Section 1. That the following position’s duration be extended:

Job Class	Position Number	Type	Duration if Limited Duration
Behavioral Health Specialist I (1160)	2906	1.00 LTD	Extend duration from 6/30/24 to 06/30/25
<b>Total FTE</b>		<b>1.00 LTD</b>	

Section 2. That the Human Resources Director make the appropriate entries in the Deschutes County FTE Authorized Positions Roster to reflect the above FTE changes.

DATED this \_\_\_\_\_ day of March, 2024.

BOARD OF COUNTY COMMISSIONERS OF  
DESCHUTES COUNTY, OREGON

\_\_\_\_\_  
PATTI ADAIR, Chair

ATTEST:

\_\_\_\_\_  
ANTHONY DEBONE, Vice-Chair

\_\_\_\_\_  
Recording Secretary

\_\_\_\_\_  
PHIL CHANG, Commissioner



**Form Name:**

**Letter of Agreement/Approval Letter (BH Investment)**

**Deschutes County Health Services**  
Older Adults Stabilization Services

FollowUp Snapshot	
Amount Requested	\$384,484.00
Organization Contact	Janice Garceau
Contact Phone	541-322-7664
Contact Email	janice.garceau@deschutes.org
Organization Address	2577 NE Courtney Dr. Bend, OR 97701
Website	<a href="http://cohealthcouncil.org/">http://cohealthcouncil.org/</a>
Project Lead	Kara Cronin
Project Lead email	kara.cronin@deschutes.org

**RHIP Workgroup:**

**Future State Measure:**

Note: \* indicates required questions

## Terms & Conditions

---

### Project Name

Older Adults Stabilization Services

### Timeline - Project Start Date

*The effective date of your contract begins on the project start date that you indicated on your application.*

04/01/2024

### Timeline - Project End Date

*I. **Term.** This LOA shall commence on the Effective Date and shall terminate on the date indicated below. The COHC may terminate this LOA, without cause, by providing You with written notice at least five (5) business days in advance.*

06/30/2025

### Amount Requested

*The total amount of funds requested from the Central Oregon Health Council for this project.*

\$384,484.00

### Amount Awarded

\$484,484.00

### Invoice\*

*Please upload an invoice to enable COHC to disperse your funds. If you do not want to invoice us now, please upload an invoice of \$0.*



**W-9\***

*Please upload a completed W-9.*

**ACCEPTANCE OF TERMS & CONDITIONS\***

*This grant is conditional upon Grantee's acceptance of the terms and conditions set forth herein. By selecting the*

**Name\***

**Title\***

**LOA execution date\***

*Please enter today's date*

## FollowUp Files

---

### Applicant File Uploads

*No files were uploaded*



**Form Name:**

**Letter of Agreement/Approval Letter (BH Investment)**

**Deschutes County Health Services**  
Deschutes County Stabilization Center Respite Services

FollowUp Snapshot	
Amount Requested	\$517,500.00
Organization Contact	Janice Garceau
Contact Phone	541-322-7664
Contact Email	janice.garceau@deschutes.org
Organization Address	2577 NE Courtney Dr. Bend, OR 97701
Website	<a href="http://cohealthcouncil.org/">http://cohealthcouncil.org/</a>
Project Lead	Adam Goggins
Project Lead email	Adam.Goggins@deschutes.org

**RHIP Workgroup:**

**Future State Measure:**

Note: \* indicates required questions

## Terms & Conditions

---

### Project Name

Deschutes County Stabilization Center Respite Services

### Timeline - Project Start Date

*The effective date of your contract begins on the project start date that you indicated on your application.*

07/01/2024

### Timeline - Project End Date

*I. **Term.** This LOA shall commence on the Effective Date and shall terminate on the date indicated below. The COHC may terminate this LOA, without cause, by providing You with written notice at least five (5) business days in advance.*

06/30/2025

### Amount Requested

*The total amount of funds requested from the Central Oregon Health Council for this project.*

\$517,500.00

### Amount Awarded

\$617,500.00

### Invoice\*

*Please upload an invoice to enable COHC to disperse your funds. If you do not want to invoice us now, please upload an invoice of \$0.*

**W-9\***

*Please upload a completed W-9.*

**ACCEPTANCE OF TERMS & CONDITIONS\***

*This grant is conditional upon Grantee's acceptance of the terms and conditions set forth herein. By selecting the*

**Name\***

**Title\***

**LOA execution date\***

*Please enter today's date*

## FollowUp Files

---

### Applicant File Uploads

*No files were uploaded*



BOARD OF COMMISSIONERS

AGENDA REQUEST & STAFF REPORT

MEETING DATE: March 27, 2024

SUBJECT: Deliberations: Draft 2020-2040 Tumalo Community Plan Update

RECOMMENDED ACTION:

On March 27, 2024, the Board of County Commissioners (Board) will deliberate on the County's drafted 2020-2040 Tumalo Community Plan Update. The Board is not limited to the issue areas outlined in the attached memorandum; rather, the Commissioners are welcome to deliberate on any desired topics from the public record which they deem pertinent.

If the Board determines that additional deliberations are necessary, those will be continued at a future meeting. If the Board concludes its deliberations during the March 27th meeting, it may then vote on whether to adopt the plan as drafted, adopt the plan with amendments, or deny the plan. Following deliberations and subsequent action to adopt the plan, staff will return at a future meeting with a draft ordinance for first reading.

BACKGROUND AND POLICY IMPLICATIONS:

The full record of the Draft 2020-2040 Tumalo Community Plan Update (Files 247-23-000509-PA, 510-TA) is located on the project webpage: https://www.deschutescounty.gov/cd/page/tumalo-community-plan-update-2020-2040-247-23-000509-pa-510-ta

BUDGET IMPACTS:

None

ATTENDANCE:

Tarik Rawlings, Senior Transportation Planner



**MEMORANDUM**

**TO:** Deschutes County Board of County Commissioners (Board)

**FROM:** Tarik Rawlings, Senior Transportation Planner

**DATE:** March 20, 2024

**SUBJECT:** Deliberations: Tumalo Community Plan update - File no. 247-23-000509-PA, 510-TA

The Planning Division is updating the 2010-2030 Tumalo Community Plan (TCP) to 2020-2040 due to changes in the community and passage of time. Additionally, the County received a \$75,000 Transportation Grant Management (TGM) from the State, of which the bulk was dedicated to update the bike/ped/transit, aka Active Transportation, element of the TCP. The County hired Kittelson and Associates (KAI) to do the work for the TGM grant.

The purpose of this memo is to summarize the public input received regarding the TCP and to provide a recap of the public process undertaken for this project. Following a public hearing on December 6, 2023, the Board of County Commissioners (Board) will engage in deliberations on March 27, 2024.

**I. BACKGROUND**

Tumalo is an Unincorporated Community under Oregon Administrative Rule (OAR) 660-022, meaning the land use pattern is quasi-urban in terms of density and land uses and predated Oregon’s land use system, which began in 1973. The state classifies Tumalo as a Rural Unincorporated Community<sup>1</sup> and the County administers it under Deschutes County Code (DCC) 18.67. The Tumalo Community Plan is Section 4.7 of the Comprehensive Plan and appears as Appendix B of the Comprehensive Plan.

In support of the TCP update, staff prepared a website, [www.deschutes.org/tumaloplan](http://www.deschutes.org/tumaloplan), which featured a StoryMap that provided a narrative of the project, the community’s history, the purpose of the TCP, surveys, and an opportunity to leave a contact email. Additionally, the full record

<sup>1</sup> OAR 660-020-010(7) “Rural Community is an unincorporated community which consists primarily of permanent residential dwellings but also has at least two other land uses that provide commercial, industrial, or public uses (including but not limited to schools, churches, grange halls, post offices) to the community, the surrounding area, or to persons traveling through the area.”



including public and agency comments is included at the following project-specific website: <https://www.deschutescounty.gov/cd/page/tumalo-community-plan-update-2020-2040-247-23-000509-pa-510-ta>

Staff provided numerous methods for the public to provide input on what they wanted in the TCP, comments on the community vision, as well as specific draft goals and policies. The public outreach methods ranged from traditional meetings in the Tumalo School Gym to face-to-face meetings at a local coffeehouse to Zoom meetings. Public outreach included mailers to Tumalo residents initially. These were followed by emails via Constant Contact based on information from attendance sheets, contact info left at the website, or phone calls and/or emails to Planning staff. Outreach for specific events included:

- Tumalo StoryMap #1, April 27-May 25, 2022
- Tumalo Community Plan Open House #1, May 11, 2022 (Kick Off meeting)
- Meet A Planner, Tumalo Coffeehouse, Zoom, or phone, June 13-24, 2022
- Tumalo StoryMap #2, June 29-July 27, 2022
- Tumalo Community Plan Open House, #2, August 22, 2022 (Draft TCP, 1<sup>st</sup> version)
- Meet A Planner, Tumalo Coffeehouse, Zoom, or phone, May 2-9, 2023
- Tumalo StoryMap #3, April 23, 2023, to present
- Tumalo Open House #3, May 17, 2023, (Draft TCP, 2<sup>nd</sup> version)

The Planning Commission (PC) hosted the initial hearings for review of this update. Staff held a July 27, 2023, work session<sup>2</sup> with the Planning Commission to provide an overview of the updated TCP and the process to create it. The PC held a public hearing<sup>3</sup> on August 10, 2023, on the draft 2020-2040 TCP. The PC voted to continue the public hearing to August 24, 2023<sup>4</sup> and collected additional public comments. At the conclusion of oral testimony on August 24, 2023, the PC voted to close the oral and record and leave the written record open until 4 p.m. on September 7, 2023. Deliberations before the PC were initially held on October 12, 2023<sup>5</sup> with the PC voting to continue deliberations until October 26, 2023. The PC held continued deliberations on October 26, 2023<sup>6</sup>, ultimately making a recommendation to the Board to adopt the TCP document including amendments. The PC's recommendation was presented to the Board at a public hearing on December 6, 2023<sup>7</sup> and the Board voted to keep the written record open until December 13, 2023 at 4:00pm to collect any additional public input. In anticipation of the Board's public hearing on December 6, 2023, notice was provided to the Department of Land Conservation and Development (DLCDD) on July 6, 2023 with a Notice of Application sent to agency partners on July 21, 2023. Additionally, a Notice of Public Hearing was published in the Bulletin newspaper on November 19, 2023 and courtesy email notice was sent to participating parties on November 17, 2023. These relevant dates and events are outlined in Table 1, below.

---

<sup>2</sup> <https://www.deschutes.org/bc-pc/page/planning-commission-37>  
<sup>3</sup> <https://www.deschutes.org/bc-pc/page/planning-commission-38>  
<sup>4</sup> <https://www.deschutes.org/bc-pc/page/planning-commission-39>  
<sup>5</sup> <https://www.deschutes.org/bc-pc/page/planning-commission-41>  
<sup>6</sup> <https://www.deschutes.org/bc-pc/page/planning-commission-42>  
<sup>7</sup> <https://www.deschutes.org/bcc/page/board-county-commissioners-meeting-140>

**Table 1 – TCP Review Timeline**

<b>Date</b>	<b>Event</b>
July 6, 2023	Notice provided to the DLCD in anticipation of the Board’s public hearing.
July 21, 2023	Notice of Application sent to agency partners.
July 27, 2023	Work session with the Planning Commission (PC) to overview the updated TCP.
August 10, 2023	Public hearing on the draft 2020-2040 TCP.
August 24, 2023	Continuation of public hearing and closure of oral testimony, written record left open.
September 7, 2023	Written record closed at 4 p.m.
October 12, 2023	Initial deliberations before the PC.
October 26, 2023	Continued deliberations and PC's recommendation to adopt the TCP with amendments.
November 17, 2023	Courtesy email notice sent to participating parties.
November 19, 2023	Notice of Public Hearing published in the Bulletin newspaper.
December 6, 2023	Public hearing where the PC’s recommendation was presented to the Board.
December 13, 2023	Written record kept open until 4:00pm for additional public input.

For a detailed account of the PC’s recommendation, including proposed amendments to the draft TCP, please see Section V, below.

**II. KEY ASPECTS OF THE 2020-2040 TCP**

The prevailing sentiment of the public who attended or commented was the desire to preserve Tumalo’s feel of being a small town. There were also concerns about the possibility of private sewer (which serves the higher density residential neighborhood on the south side of U.S. 20) extending across the highway into Tumalo and the changes this could bring to the community. Several public comments focused on limiting the number of dwelling units that could be approved in association with a multi-family dwelling complex. Other concerns included balancing economic development with Tumalo’s historically rural nature, the side effects of tourism, protecting the Deschutes River, and concerns about rising traffic volumes and the speed of traffic.

Below is a summary of the differences between the current TCP and the draft update.

**Differences Between Draft 2020 TCP and 2010 TCP**

<b>SECTION TITLE</b>	<b>GOALS</b>			<b>POLICIES</b>			
	Unchanged	Changed	New	Unchanged	Changed	New	Deleted
Land Use		X		2	2		2
Natural Resources, Open Space, Rec			X	1	9	6	
Residential Area			X	2		2	4
Econ Development			X	2	3	1	1

Public Facilities		X			6	5	2
Transportation		X		NA	NA	NA	NA
Road Network	NA	NA	NA		3	1	1
Roads & sidewalks	NA	NA	NA	2	3	2	
<b>Totals</b>		<b>3</b>	<b>3</b>	<b>9</b>	<b>26</b>	<b>17</b>	<b>10</b>

An attached color-coded version of the TCP is included to show how various goals and policies address these and other issues. Additionally, the attached spreadsheet compares and contrasts the 2020-2040 TCP goals and policies to the 2010-2030 TCP and provides a summary of why the text remained the same, was changed, or new language was added.

**III. KEY ASPECTS OF THE TGM GRANT FOR BIKE/PED/TRANSIT IN TUMALO**

The Tumalo portion of the TGM grant had an overlap with the TCP, including having consultant staff at the May 11, 2022, Kick Off meeting. Other public outreach occurred via:

- Walking downtown tour of Tumalo, focusing on bike/ped/transit, June 8, 2022
- Interactive StoryMap, June 8-July 13, 2022
- Virtual Open House, October 5-24, 2022

The dominant themes were safety and improvements to lower speeds; pedestrian connectivity; location of future transit stop; and potential amendments to bike standards in Deschutes County Code (DCC) at 17.48, Table A (Road Standards) and Table B (Bikeway Standards). The specific recommendations are found in two memos, Final Concept Plan (December 7, 2022) and TCP Active Transportation Update and SCVAP Trails Expansion Outreach – Implementation Measures Deschutes County Code (January 31, 2023).

**IV. RELATIONSHIP TO TUMALO SEWER FEASIBILITY STUDY**

While the TCP and sewer feasibility unfolded at roughly the same time, they have no regulatory relationship. The sewer feasibility study was an economic analysis of various alternatives to bring sewer to Tumalo via either extension of Tumalo Property Owners Association (TPOA) existing private system; a new local and collector system; or having a pipeline connect to the City of Bend system. The study’s assumption and conclusions can be found at this link:

[full\\_report\\_and\\_appendices.pdf \(deschutes.org\)](https://www.deschutes.org/files/2023/04/full_report_and_appendices.pdf)

While the sewer feasibility study was a separate process, staff repeatedly heard from the community about its concerns regarding cost, effect of development, fees, and potential implications for denser development. Staff crafted policies in response to these concerns that appear in the TCP Public Facilities section.

**V. PLANNING COMMISSION REVIEW AND RECOMMENDATION**

Following public hearings, the PC ultimately made a recommendation to the Board to adopt the TCP document including the following amendments:

- Remove Policies #10 and #11 from the Natural Resources, Open Space, and Recreation Policies section of the TCP's goals and policies. *(5 Commissioners in favor, 1 Commissioner in opposition, 1 Commissioner abstained)*
- Add a policy to explore legislative changes to limit multi-family housing to 4 units in Tumalo. *(7 Commissioners unanimously in favor)*
- Support for public art in Tumalo. *(7 Commissioners unanimously in favor)*
- Encourage residents and community groups to reach out to Deschutes County for updates and information. *(5 Commissioners in favor, 2 Commissioners in opposition)*

**VI. NEXT STEPS**

The Board is not limited to the issue areas outlined in the PC's recommendation or referenced elsewhere in this memorandum and the Commissioners are welcome to deliberate on any desired topics from public record that they deem pertinent. If the Board determines that additional deliberations are necessary, staff will work with the Board to schedule a future meeting for continued deliberations. If the Board concludes their deliberations during the March 27, 2024 meeting, the Board may then vote on whether to adopt the plan as drafted, adopt the plan with amendments, or deny the plan. If the Board renders a vote during the March 27, 2024 meeting, staff will coordinate with the Board to return for a future meeting during which a draft ordinance and relevant exhibits will be presented and a first reading of the ordinance initiated.

**VII. CONCLUSION**

Staff is prepared to answer any questions.

**ATTACHMENTS:**

1. Draft Tumalo Community Plan (2020-2040)
2. TCP Findings
3. Color-coded version of goals and policies
4. Spreadsheet of 2020 and 2010 TCP text with notes
5. Final memos for Tumalo bike/ped/transit portion of TGM grant
  - Final Concept Plan (December 7, 2022)
  - TCP Active Transportation Update and SCVAP Trails Expansion Outreach - Implementation Measures Deschutes County Code (January 31, 2023)

Deschutes County

# Tumalo Community Plan

2020-2040



Deschutes County Community Development  
Updated 2023

# Introduction

---

The Tumalo Community Plan (Community Plan) is an integral part of the Deschutes County Comprehensive Plan and, upon adoption by the Board of County Commissioners, constitutes an official chapter (Section 4.7). The Community Plan may only be changed if it is reviewed through an official legislative plan amendment process. The Community Plan’s goals and policies provide a decision-making guide for land use planning, capital improvements, and physical development during the next 20 years (2020 – 2040). It is anticipated that Deschutes County, Oregon Department of Transportation (ODOT), special districts, residents, and community leaders will consult the Community Plan when preparing land use or transportation projects in Tumalo.

Tumalo is a small rural community located approximately three miles northwest of Bend in the center of Deschutes County. Oregon Administrative Rules recognize areas in Deschutes County like Tumalo as an “Unincorporated Community” under OAR 660-022. Of the four types of unincorporated communities identified in OAR 660-022, Tumalo is a Rural Community. OAR 660-022 states a Rural Community is place “which consists primarily of permanent residential dwellings but also has at least two other land uses that provide commercial, industrial, or public uses (including but not limited to schools, churches, grange halls, post offices) to the community, the surrounding rural area, or to persons traveling through the area.”



Image: Metal Statute, Photo Credit: Deschutes County Staff

Deschutes County plans and regulates land uses in Tumalo under this legal definition. The Deschutes River and U.S. 20 bisect Tumalo. Single-family home neighborhoods , a small commercial node, as well as Tumalo Community School all lie north of the highway and west of the river. Additional commercial and industrial properties are located on the south side of the highway. This includes a more recent residential neighborhood with higher densities than previously found in Tumalo. Although this Community Plan only addresses lands within the Tumalo boundary, access to U.S. 20, local businesses, district offices, Tumalo Community School, and Tumalo State Park create a hub that attracts nearby residents and visitors.

The Tumalo Community School, within the Redmond School District, had originally served children between kindergarten and 8<sup>th</sup> grade, with an approximate attendance of 407 students in 2010. Beginning in 2020, due to decreasing student attendance numbers, the school transitioned away from a middle school model and began serving around 250 students between kindergarten and 5<sup>th</sup> grade. The school's geographic service area extends to the outlying areas of Bend, in addition to Tumalo.

Just one mile away, Tumalo State Park encompasses approximately 156 acres with an addition 52 acres of contiguous surrounding land also owned and operated by the Oregon State Parks system. The park offers camping, picnicking, fishing, hiking, and wildlife viewing and hosted approximately 517,000 visitors in 2021. Its location provides an excellent place to camp while enjoying Central Oregon's surrounding amenities and year-round recreation. A 2.4-mile segment of the 12-mile Deschutes River Trail is accessible from a day-use area parking lot within Tumalo. The trail follows the Deschutes River south 1.4 miles to Riley Ranch Nature Reserve, which offers additional trails.

Between 2010 and 2020, Tumalo has undergone significant changes in terms of land use activities and transportation improvements. Several artisan shops have opened along Cook Avenue, there is a thriving food cart pod, the Twin Bridges State Scenic Bikeway rolls through Tumalo, and a two-lane roundabout is due to open in 2023/24 at US 20/Cook-OB Riley intersection. The County anticipates an additional roundabout at Cline Falls Highway/Tumalo Road intersection. A small-scale sewer system has developed that serves the higher-density neighborhood in an area bounded by the south side of US 20, Bailey Road, and OB Riley Road. Based on residents' requests, the County hired a consultant to conduct a sewer feasibility study, which was conducted in 2022. The sewer feasibility study provides a high-level assessment of the costs and potential for sewer expansion throughout Tumalo as many properties are on older septic systems. The feasibility study provided information to residents on potential next steps if the community chooses to form a sewer district.

Based on the changes noted above and the population growth in the community, the County determined it was time to update the 2010-2030 TCP. The County also received a Transportation Growth Management (TGM) grant to focus on bicycling, walking, and transit, aka active transportation, in Tumalo. Both efforts involved extensive coordinated public outreach.

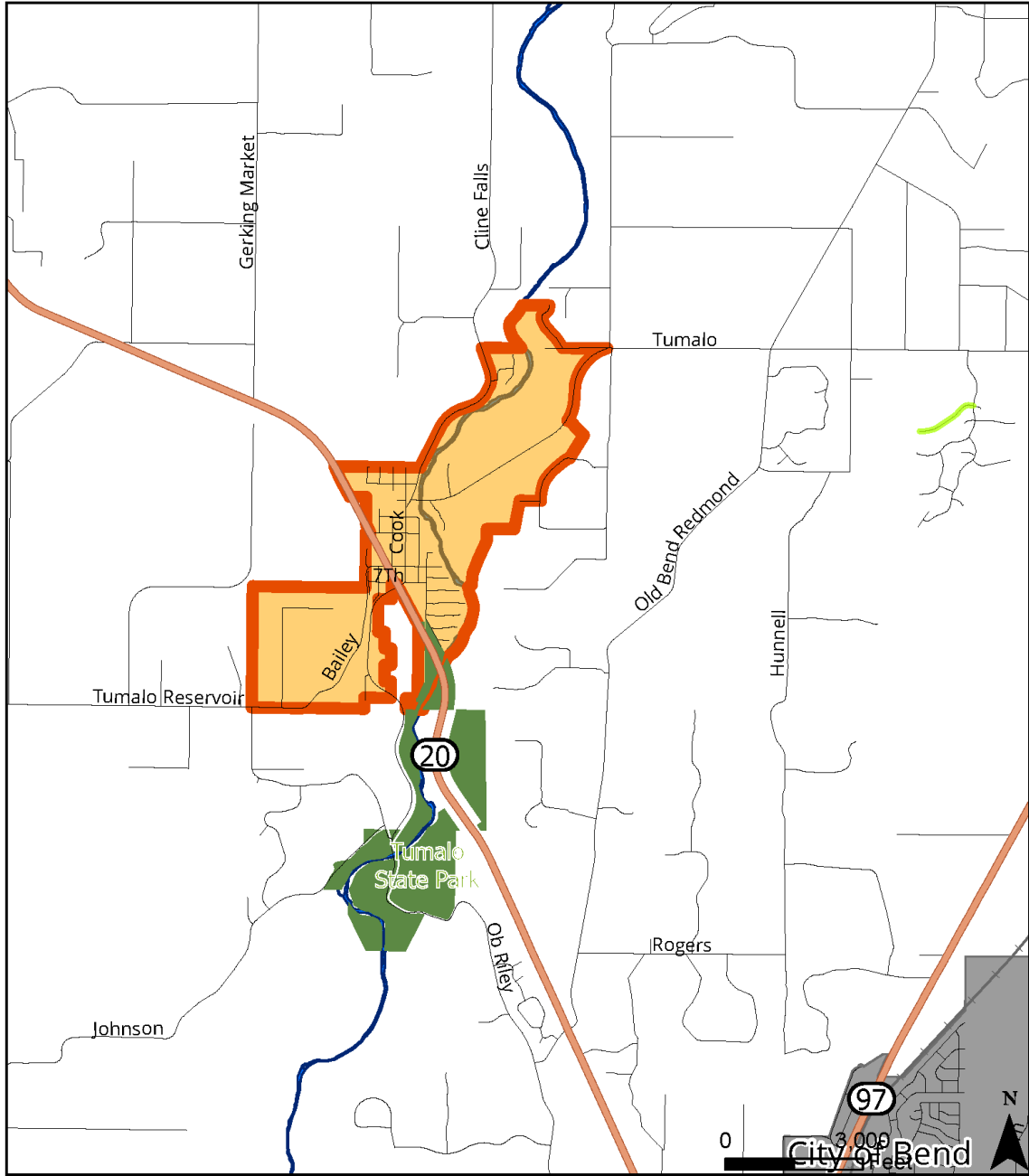
The TCP Open Houses occurred in the Tumalo Community School gym on May 11, 2022 (kickoff meeting); August 8, 2022 (draft goals and policies); and May 17, 2023 (revised draft goals and policies). Additionally, staff held Meet A Planner one-on-one sessions in Tumalo from June 13-24, 2022 and again from May 2-9, 2023. Finally, staff created public web pages and online story maps to summarize the project, conduct surveys, and provide updates.

The TGM grant took a similar approach to public outreach, including a June 8, 2022, walking tour of downtown Tumalo where the public provided comments and suggestions. The TGM bike/ped/transit grant also included a story map, a website, and stakeholder advisory committee meetings. The TGM grant's recommendations for bike/ped/transit are incorporated into the TCP.

DRAFT



### Tumalo Vicinity Map



- Tumalo State Park
- City of Bend
- Unincorporated Community

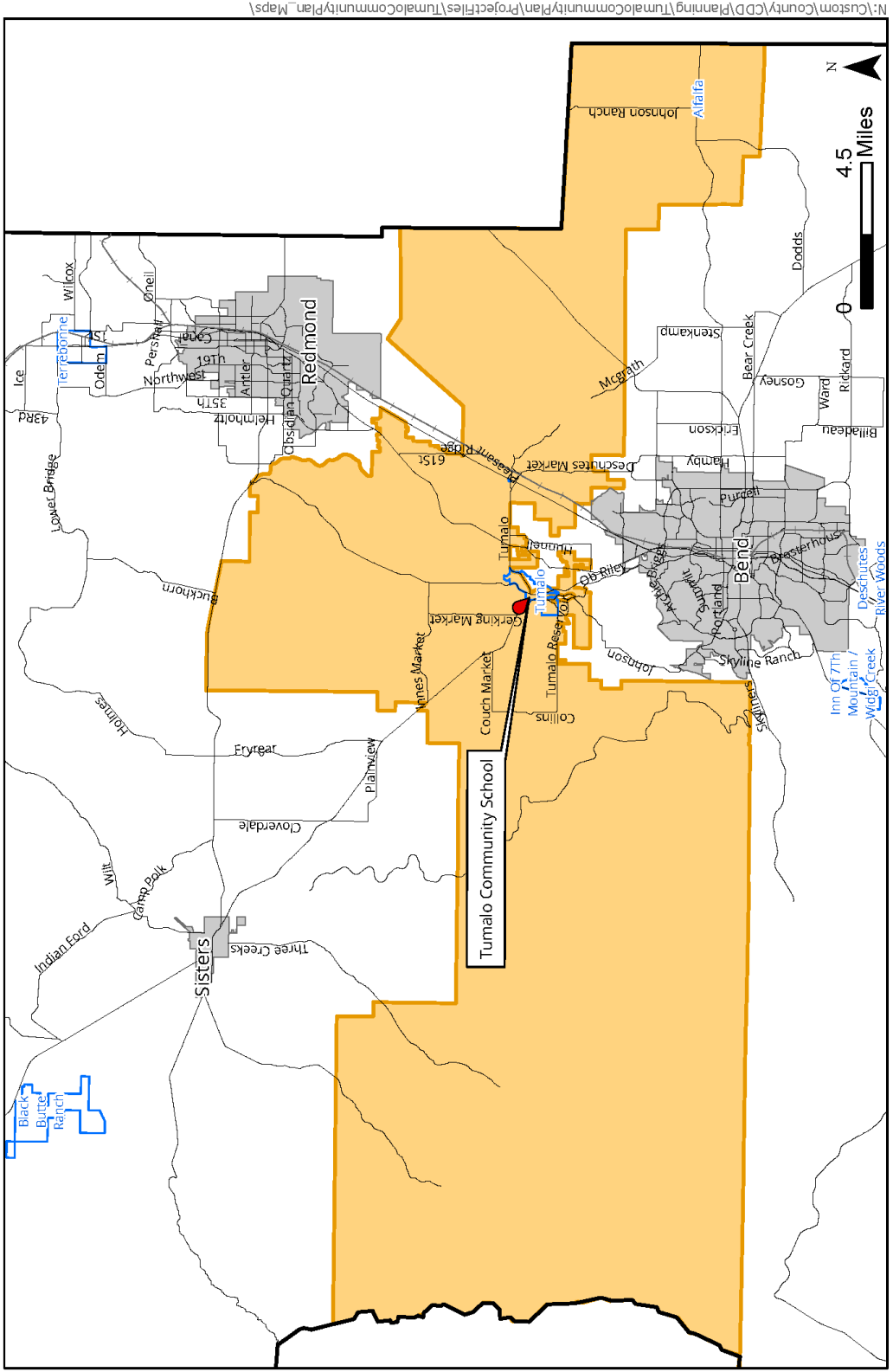
### Tumalo Vicinity Map



6/15/2022







# Tumalo Community School Student Boundary Map



## Tumalo Community School Attendance Area

6/23/2022

-  Tumalo Community School
-  Tumalo School Attendance Area
-  Unincorporated Community
-  County Boundary

# Community Vision Statement

---

*Retain the livability of Tumalo as a rural small town, by ensuring safe and efficient public services and collaborating with the surrounding rural area.*

Tumalo residents' input crafted this community vision for 2020 to 2040. It is their intent that the Community Plan, developed in cooperation with Deschutes County, will serve as a framework to realize this vision. The community input came from several public venues. These included public open houses, one-on-one meetings with County planners, public surveys, online comments, and e-mails to County staff. Input came from people who lived within the boundaries of Tumalo as well as those who live near Tumalo and either shop or work there or send their children to school there.

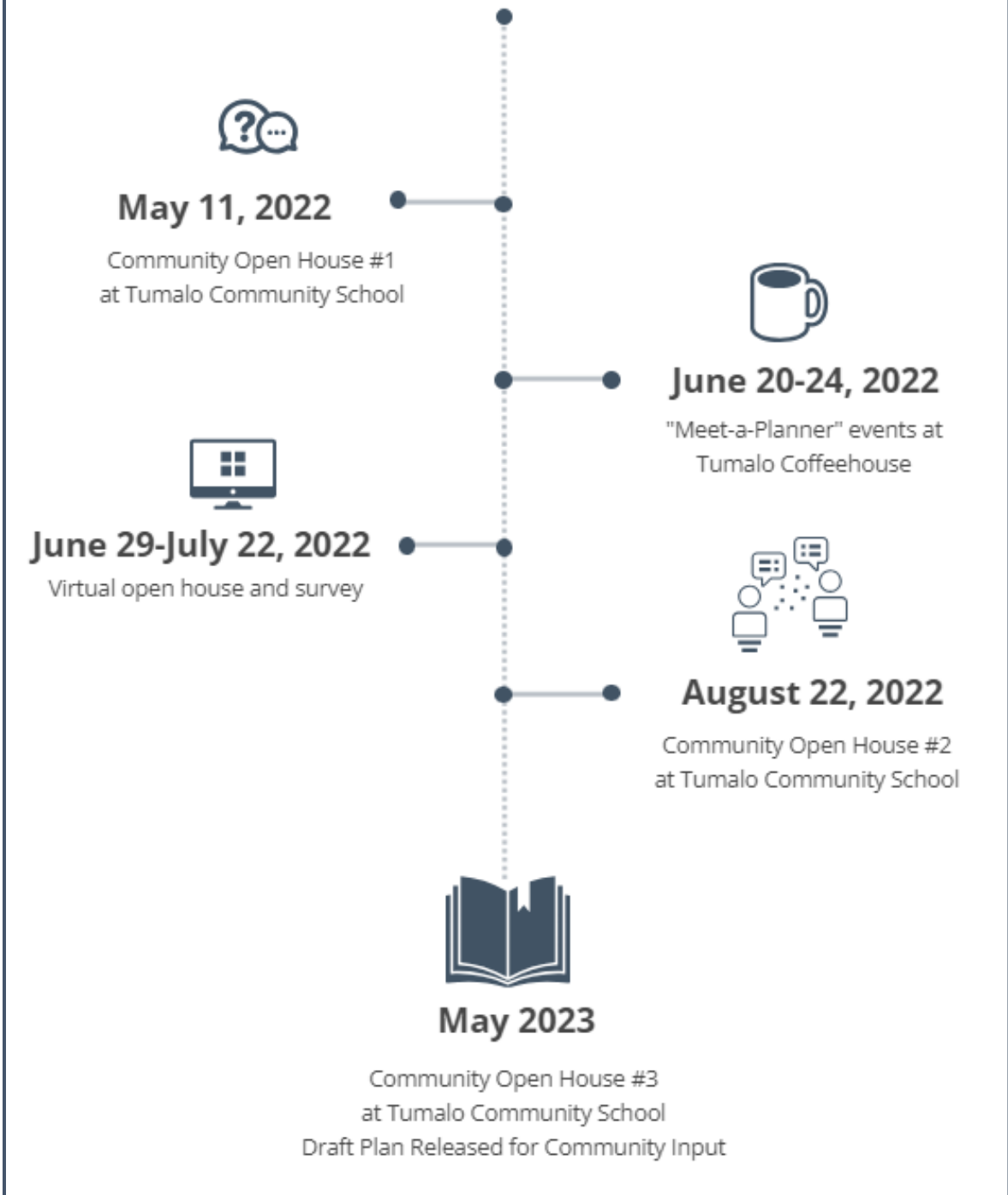
Notice of the first open house was mailed to every property (261 total) in Tumalo as well flyers hung through the community. In-person open houses were held at the Tumalo Community School on May 11 and August 22, 2022, and averaged between 50 and 70 attendees at each meeting. A virtual open house and survey was held between June 29, 2022 - July 22, 2022, and gathered 55 responses related to the community vision and key issues facing Tumalo.

Staff held a one-on-one engagement series called "Meet A Planner", in which community members could have a 30-minute conversation with a planner to express the key issues, challenges, and concerns facing Tumalo. Seven meetings occurred between June 20-24, 2022, either in person at Tumalo Coffeehouse or virtually.

The County developed an e-mail listserv for the project updates by collecting emails through sign-in sheets at the open houses or directly via the project website. As of June 1, 2023, 181 community members subscribed for project updates. Nine total project updates were sent throughout the process to advertise in person and online engagement events.

The 2010-2030 and 2020-2040 Community Vision statements are practically identical. The only changes were directed at deletion of the hyphen in "small-town" and changing "rural community" to "rural area." The latter relates to Oregon Administrative Rule (OAR) 660-022 and how that provision clarifies that the word "community" refers to a more geographically limited area. Overall, respondents expressed a strong desire to keep the vision statement unchanged and for Tumalo to remain rural in nature. The intent to keep the community rural is consistent with OAR 660-022.

# Community Input



# History

---

Situated at an elevation of approximately 3,200 feet, Tumalo lies in the middle of the Upper Deschutes River Basin (river miles 157 and 158). The commercial core of Tumalo lies on an alluvial bowl bounded by the Laidlaw Butte and the bluff of the Deschutes River canyon. The Deschutes River bisects the community. Originally named Laidlaw, Tumalo was platted by the Laidlaw Townsite Company in 1904. However, development originally began in 1899 when the Three Sisters Irrigation Company incorporated. Under the Carey Act, they made plans for diverting water from Tumalo Creek and the Deschutes River to irrigate approximately 60,000 acres of arid land. As the town grew, it became a voting precinct in 1906, with 65 registered voters compared to Bend's 66. Out of nearly 900 platted lots, a third were sold by 1907.

Town founder A.W. Laidlaw of Portland and his investors believed that Tumalo would become the heart of Central Oregon. By 1909, the Laidlaw community aspired to establish the junction of two railroads, and thereby creating a new "metropolis" in Central Oregon. There were reasons for optimism as railroad magnates James Hill and E. H. Harriman were competing to finish a rail line from the mouth of the Deschutes River to Central Oregon. Mr. Laidlaw assumed the rail line would come south, up the Deschutes River canyon, into the newly platted town. Assertions were also made that the Laidlaw community would benefit from connection to another rail line, one that followed the North Santiam River and crossed over the Cascades.

Ultimately, neither of these two projects came to fruition. At the end of 1909, the Columbia Southern Railroad still ended in Shaniko, and the Corvallis and Eastern rail lines remained stalled at the foothills west of the Cascades. Both rail line projects ultimately languished for approximately 15 years. Following the announcement in 1910 that the Columbia Southern Railroad was connecting to Bend instead of Laidlaw, Bend began outpacing Laidlaw in population. As a result, Laidlaw's population decreased to 250 people, with many businesses relocating to Bend. The small town remained as Laidlaw until the Laidlaw Post Office closed in 1913. The post office eventually reopened in 1923 as the Tumalo Post Office, and the name of the town was changed to Tumalo.

In those early days, Laidlaw had a weekly newspaper, a barbershop, two-story hotel, lawyers' offices, wallpaper company, bakery, feed stores and bank. Today, legacy buildings include the Laidlaw Bank and Trust Property and Tumalo Community Church.

# Land Use

The 1979 Deschutes County Comprehensive Plan designated Tumalo as a Rural Service Center because it contained a concentration of residential and commercial properties. A 1979 inventory showed Tumalo consisting of 491 acres and 288 tax lots. In 1994, the Oregon Land Conservation and Development Commission adopted a new Oregon Administrative Rule for unincorporated communities, instituting new land use requirements for Tumalo (OAR 660, Division 22). As part of periodic review, in 1997 Deschutes County updated its Comprehensive Plan and implemented zoning regulations to comply with these state requirements. Based on public input, Tumalo’s boundary was amended to accommodate 504.11 acres and 321 tax lots. A 1999 amendment removed three tax lots that were accidentally included, leaving Tumalo with 318 tax lots as inventoried during the County’s 2010 update to the Tumalo Community Plan. Deschutes County Code (DCC) 18.67 implements land use zoning in Tumalo while DCC 18.67 Table A sets road standards.

Since the 2010 Deschutes County Comprehensive Plan update, including updates to the Tumalo Community Plan, the total number of tax lots has increased to 361. The increase in tax lots can be attributed to land use patterns in the area including land divisions, property line adjustments, and property-specific tax lot review related to the original Laidlaw Town Plat.

## Population and Demographic Data

Single-family residences are the predominant land use in Tumalo. Tables 1, 2 and 3 cite Deschutes County Assessor data and an adopted 20-year population forecast to estimate Tumalo’s 2021, future build out, and 2040 population.

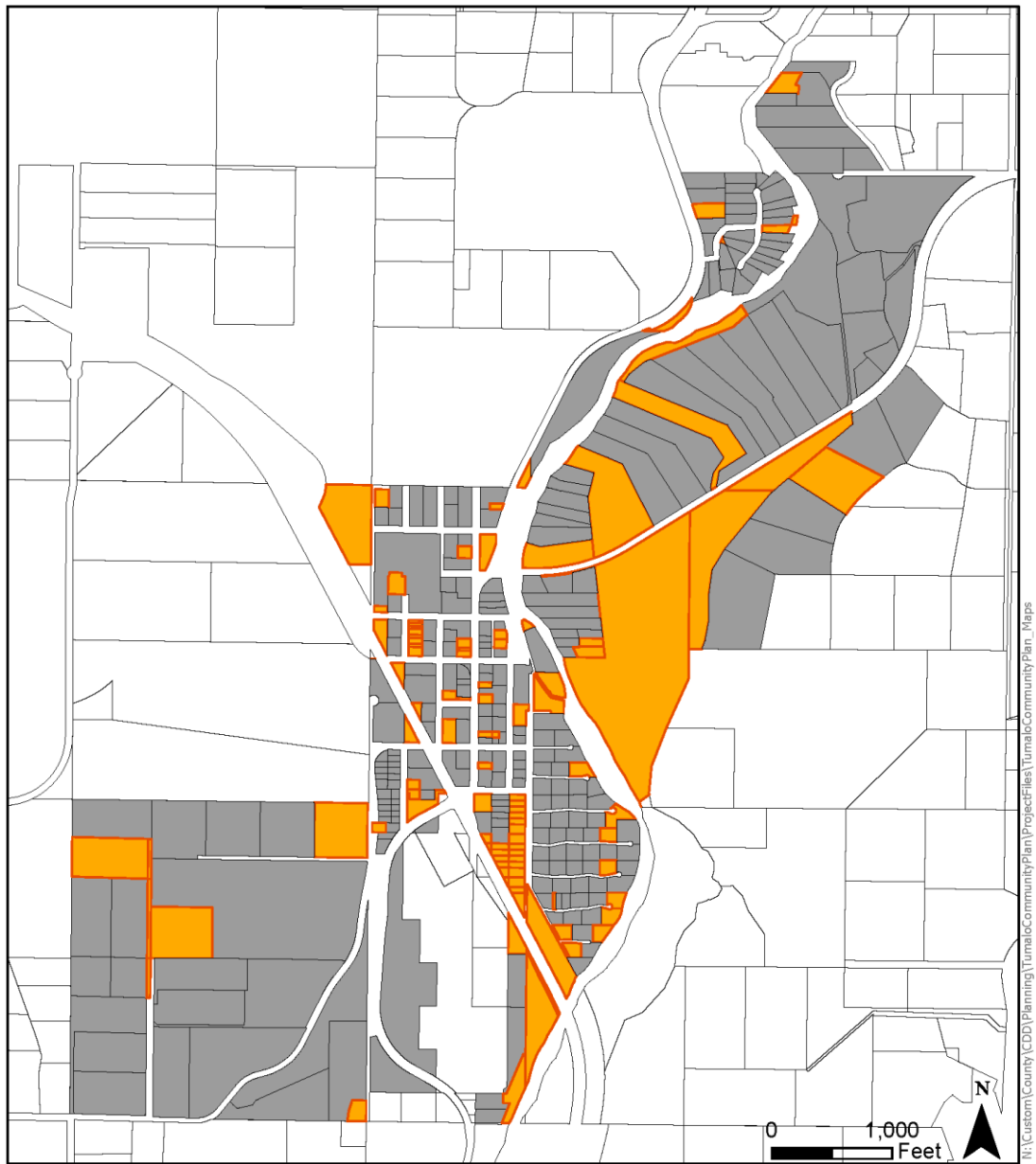
**Table 1 - 2021 Tumalo Population Estimate**

Housing Units*	Deschutes County 2020 Census (Persons Per House)	2021 Population Estimate
232	2.47*	574
*2021 Assessor's Data	*2020 Census Data	

**Table 2 - Tumalo Projected Build Out**

2021 Population Estimate	Potential Dwelling Units*	Deschutes County 2020 Census (Persons Per House)	Future Population on Undeveloped Lots	Build Out Population
<b>574</b>	101	2.47	<b>250</b>	<b>824</b>
*Assessor's Data 2021				

### Tumalo Vacant Parcels and Projected Build-Out Map (2020)



### Tumalo Comprehensive Plan 2020

-  Vacant
-  Built Out



6/15/2022

**Table 3 - Tumalo Population Forecast**

Year	Forecasted Population	Average Annual Growth Rate (AAGR)
2021	574	2.2%
2022	587	2.2%
2025	600	2.0%
2030	612	1.7%
2035	622	1.5%
2040	631	1.3%
2045	639	1.2%
2047	647	1.1%
2050	654	1.1%
2055	661	1.1%
2060	669	1.1%
2065	676	1.1%
2070	684	1.1%
2072	691	1.1%

County Population Forecast (Portland State University, 2022)

Tumalo’s projected population for 2040 is 631. This projection is extremely conservative due to limited wastewater infrastructure discussed below in Public Facilities and Services. As Table 2 illustrates (and further detailed in Table 6), a vacant lands inventory performed in 2021 identified 105 undeveloped residential lots capable of supporting up to 101 potential dwelling units. If all 105 undeveloped lots become developed and household unit size remains at 2.47, Tumalo’s population would increase by 250 people, bringing its total to 824. Under this scenario, Table 3 shows that full build out would not occur until after 2072. Since the 2020 Tumalo Community Plan adoption, Tumalo and the surrounding County jurisdiction are projected to experience the compounding factors of an aging population and a notably lower fertility rate. The age and fertility data combined with an overall expectation for increased population within cities and other sub-areas of Deschutes County results in a lower average annual growth rate than previous years. Other factors potentially affecting the relatively low forecasted population growth rate include housing availability and affordability challenges, the heightened cost of living, and the detrimental impacts of regional wildfires.

**Race and Ethnicity**

Tumalo is a predominantly white community, though the population growth over the past 10 years has seen an increase in racial and ethnic diversity, primarily among Hispanic or Latino community members. The percentage of Hispanic or Latino community members has increased from 3.3% (2010) to 6.6% (2020) of the total population. For the purposes of providing race and ethnicity data for Tumalo, population counts for the Tumalo Census Designated Place (CDP) are utilized below in Table 4, rather than the County’s population estimate provided in referenced Tables 1 and 2. The most significant difference between



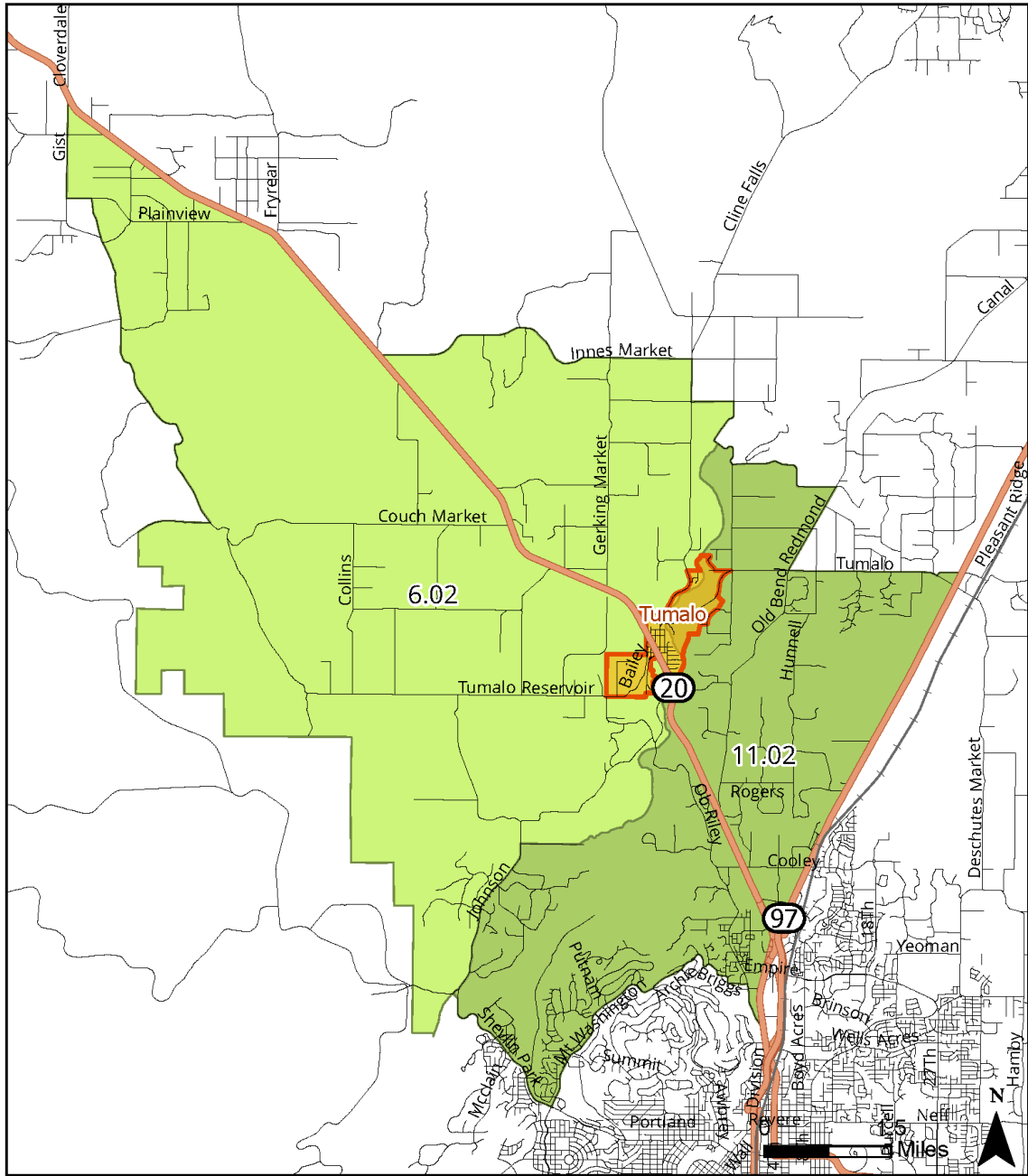
2010 and 2020 is seen in the “White alone” single-race individuals, with the percentage of individuals decreasing from 93.2% of the total population (2010) to 88.5% (2020).

**Table 4 - Tumalo CDP Race and Ethnicity (2010 and 2020)**

	<b>Tumalo (2010)</b>	<b>Tumalo (2020)</b>
<b>Total Population:</b>	488	558
Hispanic or Latino	16 (3.3%)	37 (6.6%)
Not Hispanic or Latino:	472 (96.7%)	521 (93.4%)
<b>Population of one race:</b>	460 (94.3%)	506 (90.7%)
White alone	455 (93.2%)	494 (88.5%)
Black or African American alone	1 (0.2%)	1 (0.2%)
American Indian and Alaska Native alone	3 (0.6%)	6 (1.1%)
Asian alone	1 (0.2%)	2 (0.4%)
Some Other Race alone	0	3 (0.5%)
<b>Two or More Races:</b>	12 (2.5%)	15 (2.7%)
<b>Population of two races:</b>	6 (1.2%)	12 (2.2%)
White; Black or African American	1 (0.2%)	1 (0.2%)
White; American Indian and Alaska Native	3 (0.6%)	6 (1.1%)
White; Asian	2 (0.4%)	0
White; Some Other Race	0	4 (0.7%)
Asian; Native Hawaiian and Other Pacific Islander	0	1 (0.2%)
<b>Population of three races:</b>	6 (1.2%)	3 (0.5%)
White; Asian; Native Hawaiian and Other Pacific Islander	6 (1.2%)	3 (0.5%)

*2010 and 2020 US Decennial Census, Tumalo CDP-specific data*

### Tumalo Census Designated Place (CDP) Map



- Tumalo Unincorporated Community
- 11.02
- 6.02



6/23/2022

## Land Use Designations and Inventory

Deschutes County Comprehensive Plan designations identify general land uses for the community of Tumalo and provide the legal framework for establishing zoning districts. Zoning regulates land uses that are allowed in each respective district. Table 5 lists Tumalo comprehensive plan designations and corresponding zoning districts. Table 6 summarizes existing property inventories within those zoning districts, including those properties that may be encumbered by multiple zones. Detailed descriptions of the Tumalo Comprehensive Plan designations are provided below.

**Table 5 - Tumalo Land Use Designations**

Comprehensive Plan Designations	Zoning Districts
Commercial (TuC)	Commercial District (TuC)
Floodplain (FP)	Floodplain (FP)
Industrial (Tul)	Industrial District (Tul)
Research and Development (TURE)	Research and Development District (TURE)
Residential (TuR)	Residential District (TuR)
Residential 5 Acre Minimum (TUR5)	Residential Five Acre Minimum District (TUR5)

**Table 6 - Tumalo Land Use Inventory**

Zone	Residential Units / Number of Lots	Commercial & Industrial Developments / Number of Lots	Undeveloped Parcels	Total Number of Parcels
TUC	43 Units / 36 Lots	31 Buildings / 28 Lots	51	115
TUR	80 Units / 78 Lots		18	96
TUR/TUC	3 Units / 3 Lots		2	5
TUR/FP	27 Units / 27 Lots		10	37
TUR5	57 Units / 54 Lots		12	66
TUR5/FP	27 Units / 24 Lots		8	32
TURE		1 Building / 1 Lot	1	2
TUI		13 Buildings / 5 Lots	1	6
FP			2	2
<b>Total</b>	<b>237 Units / 222 Lots</b>	<b>45 Buildings / 34 Lots</b>	<b>105</b>	<b>361</b>

Assessor's Data 2021/2022

**Commercial (TUC).** A “Commercial” designation allows a range of limited commercial and industrial uses to serve Tumalo and the surrounding area. In general, the designation extends north from the approximate intersection of Riverview Ave and Cedar Lane (bound by U.S. 20 to the west) to 3<sup>rd</sup> Street between Wood and Wharton Avenues. Commercial lands

also comprise an area west of U.S. 20 between 5<sup>th</sup> and 8<sup>th</sup> Streets, bound on the west by Strickler Ave and Bailey Road.

This designation was originally intended to accommodate a mixture of small-scale commercial and limited industrial uses that historically existed within the community. The core commercial area initially encompassed lands adjacent to Cook Avenue, north of U.S. 20. The designation was ultimately expanded between Cook and Wharton Avenues, extending south to U.S. 20. This area includes the “Tumalo Mall,” an existing commercial and retail complex. The use of this building received authorization as a nonconforming use in 1986 and site plan alterations in 1987 and 1988. These land use actions brought the existing uses and structures into compliance with the commercial zone.

Currently, the core commercial area supports a variety of uses and development including cideries, a food cart pod, a greengrocer, the Tumalo Country Store gas station and general store, Tumalo Irrigation District office, a veterinary clinic, a second commercial complex at the intersection of 4<sup>th</sup> Street and Cook Ave, the Historic Tumalo Church buildings, vacant property owned and maintained by the Tumalo Community School, and a boutique leather goods manufacturer. The majority of these uses and structures have received land use approval within the past four years. The Tumalo commercial zoning district also allows for limited residential development and uses.



Photo: The Bite Food Cart Pod, Photo Credit: County Planning Staff

Floodplain (FP). A “Floodplain” designation protects the public and private property from hazards associated with floodplains; conserves important riparian areas along rivers and streams for fish and wildlife resources; and preserves significant scenic and natural resources. This designation follows the channel of the Deschutes River that bisects Tumalo. The areas of special flood hazard are identified by the Federal Insurance Administration in a report titled *Flood Insurance Study for Deschutes County, Oregon and Incorporated Areas*. This report was revised in September 2007, and includes accompanying Flood Insurance Rate Maps. The Flood Insurance Study is on file at the Deschutes County Community Development Department.

In 2020, the Deschutes Basin Habitat Conservation Plan (HCP) was finalized and approved by the U.S. Fish and Wildlife Service. The HCP, which is a 30-year plan, was part of an application for an Endangered Species Act incidental take permit (ITP) that authorizes incidental take, aka death, of listed species (Oregon spotted frog, bull trout, steelhead trout, and sockeye salmon) caused by covered activities. Based on the HCP, Wickiup Reservoir will alter its operation to improve conditions in the Deschutes River between the reservoir and Bend. The minimum flow will be 100 cubic-feet per second (cfs) in Years 1 through 7, 300 cfs in Years 8 through 12, and 400 cfs (with provisions for up to 500 cfs) in Years 13 through 30. These increases in winter flows will likely change floodplain patterns within range of the Tumalo community. Additionally, enhanced lidar terrain data derived from the Oregon Department of Geological and Mineral Industries (DOGAMI) may indicate a changing floodplain component of the Deschutes River within Tumalo. The existing FP zoning district is subject to goals and policies within this community plan and the Comprehensive Plan, are directed at producing the most accurate floodplain data possible for the Tumalo community.

Industrial (TUI). An “Industrial” designation allows a limited range of industrial uses to serve Tumalo and the surrounding area. The designation recognizes nonconforming industrial uses and properties suitable for limited amounts of additional industrial development. This designation is concentrated around the Knife River operation, which is technically outside of Tumalo, that fronts O.B. Riley Road and U.S. 20 and includes warehouse uses, mini-storage facilities, and other industrial-related development and uses.

Research and Development (TURE). A “Research and Development” designation allows research and development facilities requiring a more rural, non-industrial location to be sited in Tumalo. This designation contains two parcels in one ownership located on the southeast slope of Laidlaw Butte. It was originally created to accommodate a research and development site and associated uses predating Deschutes County’s 1979 zoning ordinance.

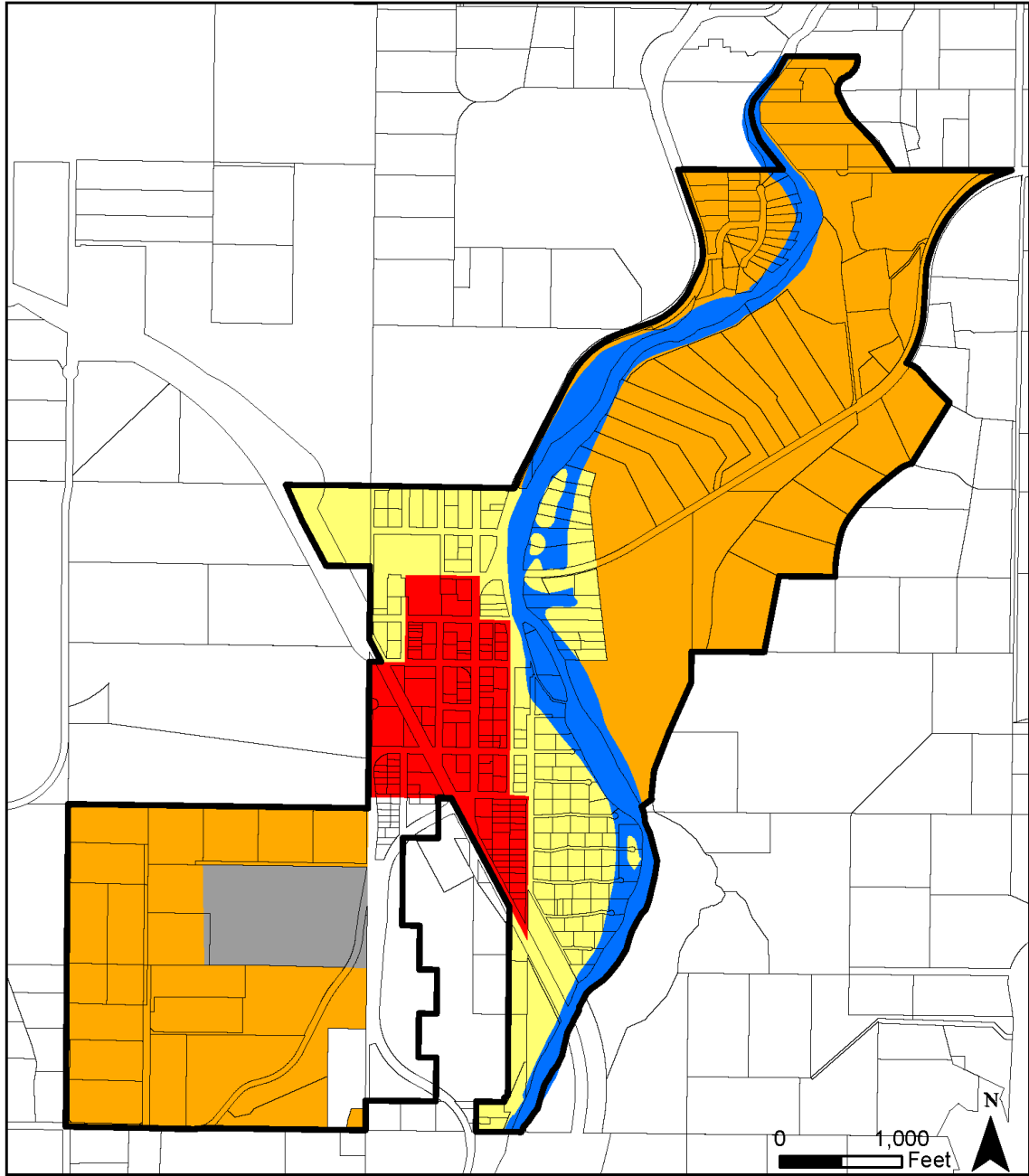
Residential (TUR). A “Residential” designation allows a mixture of housing types and densities suited to the level of available water and wastewater facilities. The purpose of this zoning district is to allow new residential development that is compatible with the rural character of the area. Originally, the residential district boundary coincided with the boundary of the old Laidlaw Plat including the Deschutes River Homesites platted between Riverview Avenue and

the Deschutes River. Today, it also includes the area surrounding the Knife River aggregate site south of U.S. 20.

Residential 5-Acre (TUR-5). A “Residential 5 Acre Minimum” designation retains large rural residential lots. The lands designated Residential-5 acre minimum include the larger parcels east of the Deschutes River and the southeast from Laidlaw Butte.



### Tumalo Comprehensive Plan Map



W:\Custom\County\CDD\Planning\TumaloCommunityPlan\ProjectFiles\TumaloCommunityPlan\_Maps

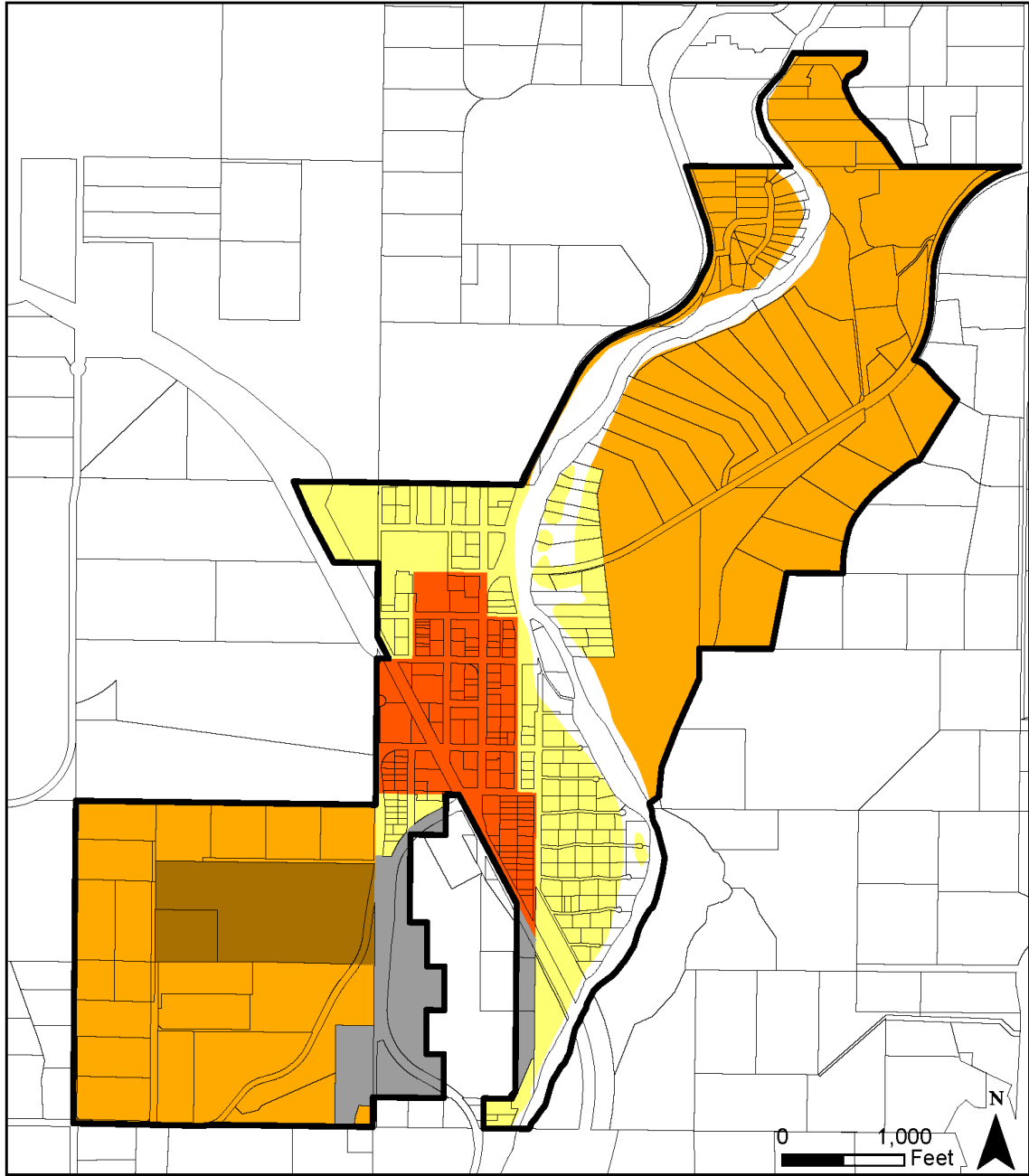
### Tumalo Comprehensive Plan 2020

- FP - Flood Plain
- TUC - Tumalo Commercial
- TUR5 - Tumalo Residential 5 Acre Minimum
- TURD - Tumalo Research & Development
- TURM - Tumalo Residential - Medium Density



6/15/2022

### Tumalo Zoning Map



### Tumalo Comprehensive Plan 2020

- TUC - Commercial
- TUR - Residential
- TUR5 - Residential 5 Acre Minimum
- TURE - Research & Development
- TUI - Industrial

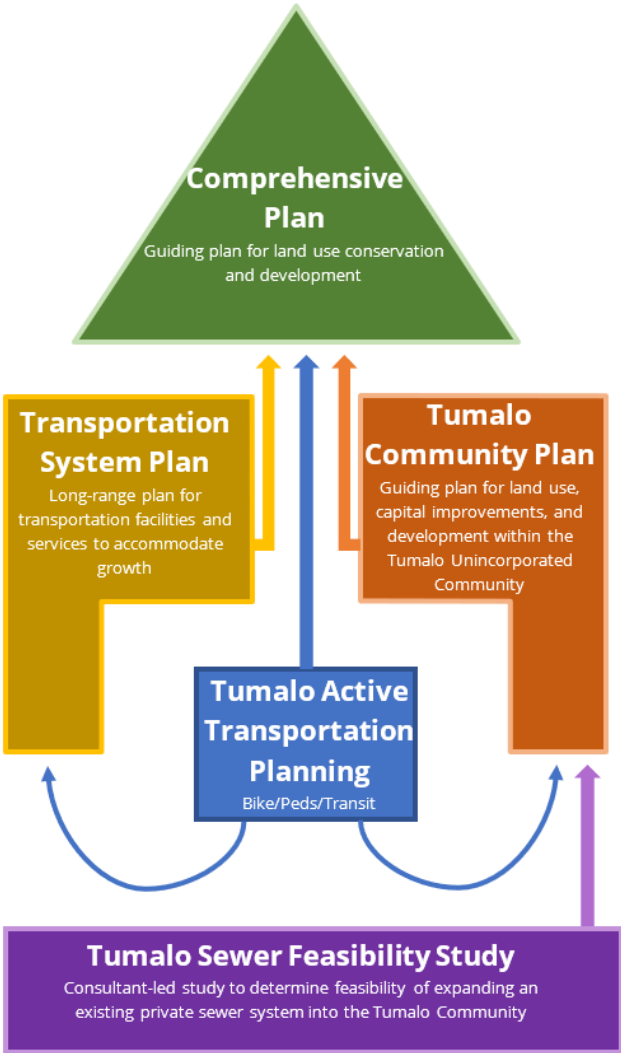


6/15/2022



# Relevant Studies and Planning Processes

The Tumalo Community Plan, as a subset of the Deschutes County Comprehensive Plan, relates directly to other relevant county plans and policies. These plans and policies include, but are not limited to, the County Transportation System Plan (TSP), Tumalo Active Transportation Planning efforts, and a Tumalo sewer feasibility study. The TSP is a long-range plan that identifies improvements to the County’s transportation facilities and services to accommodate projected population and employment growth within the County over a 20-year period. The Tumalo Active Transportation update is an effort to update the transportation element of the Tumalo Community Plan, specifically regarding active transportation such as biking, pedestrian access, and public transit. The Tumalo Sewer Feasibility Study is a consultant-led study to evaluate three potential sewer options for Tumalo. The graphic below illustrates how these various plans interact with one another and fit within the larger regional planning efforts.



# Public Facilities and Services

Tumalo is served by six special districts: Laidlaw Water District; Deschutes County Rural Fire Protection District #2; Redmond School District; the Tumalo Town District Improvement Company, Tumalo Irrigation District (via the Rimrock Water Improvement District), and Swalley Irrigation District. Tumalo’s public facilities and services are described below in greater detail.

## Domestic Water

The Laidlaw Water District serves the area identified as the old Laidlaw Plat, and the area described as T16S R12E section 29 (W1/2 SW1/4), section 30 (E1/2 SW 1/4), (SW 1/4 SE 1/4),

and section 31(NE1/4, N1/2 SE1/4), near Beaver Lane to the north of the core Tumalo community area. The power and authority given to Laidlaw Water Supply District as a government entity is vested and exercised by a board of commissioners, each of whom is an elector of the district. These commissioners have the authority under ORS Chapter 264 to determine rates and the type and extent of water supply facilities. Deschutes County coordinates with the Laidlaw Water Supply District when a property owner initiates a land use application within their district through noticing and the solicitation of agency comments. During the land use process, Laidlaw Water Supply District identifies conditions they will impose on the development proposal. The Laidlaw Domestic Water District currently depends on three groundwater wells.

The District's groundwater source does not exceed current EPA maximum contaminant limits. No treatment is performed and none has been required by the Oregon Health Division. Properties in Tumalo, but located outside Laidlaw District boundaries, rely on private domestic wells for drinking water. State law, Oregon Revised Statute 537.545, exempts private wells if domestic consumption is less than 15,000 gallons per day and irrigation of a lawn or noncommercial garden is less than one-half acre.

**Wastewater**

Tumalo does not have a community-wide wastewater facility. Instead, land uses in Tumalo currently rely on on-site wastewater systems, ranging from newer alternative treatment technologies (ATT) and filter systems, to older drainfields. Onsite systems in some cases, are insufficient and improper for a development site. According to the Deschutes County Onsite Wastewater Division, most of Tumalo's soils are rapidly draining, with rapid or very rapid permeability. Given these soil characteristics, standard septic systems can only be sited on lots greater than an acre. Smaller lots, between a half-acre and an acre are obligated to site more expensive onsite systems such as sand filters and ATTs. Additionally, there are circumstances in Tumalo where certain lots cannot be developed or redeveloped because they are too small or lack sufficient area to meet setback requirements for septic system drainfields.

Deschutes County zoning regulations restrict the type and intensity of allowed land uses to those which can be served by an Oregon Department of Environmental Quality (DEQ) approved onsite wastewater disposal system. The County does not allow uses or densities that are unable to obtain a permit for a DEQ approved onsite system. In addition, County zoning regulations set minimum lot sizes to ensure the onsite systems do not exceed soil capacity of treating wastewater effluent. These circumstances have prompted residents and business owners to express support for exploring funding opportunities to establish a community wastewater facility to maintain surface and groundwater quality.

The exception to the above is a small, privately owned wastewater system (Tumalo Property Owners Association or TPOA) that was approved in 2018 to service a compact residential development on the south side of U.S. 20 between essentially Bailey Road and O.B. Riley

Road. This private system also serves a strip mall and several other small businesses on that same south side of U.S. 20. TPOA is a Septic Tank Effluent Pumping (STEP) system, meaning biosolids are pretreated, placed in a septic tank, then the effluent is pumped into a pressurized pipe and sent up to a holding tank located on property owned by the Laidlaw Water District.

In 2022, at the request of property and business owners in Tumalo, Deschutes County, used American Rescue Plan Act monies to fund a feasibility study to evaluate possible ways to provide sewer service to Tumalo. The County selected the engineering firm Murraysmith (later absorbed by CONSOR) to perform the wastewater feasibility study with the results presented to the Board on December 21, 2022.<sup>1</sup> The feasibility study reviewed the following scenarios, all of which would require crossing U.S. 20:

1. Expand the TPOA system; establish a separate collection and treatment system within Tumalo;
2. Install a collection and disposal system in Tumalo with a connection to the City of Bend's North Interceptor line at Cooley Road/U.S. 20.

The feasibility study included additional concepts related to scale and/or phasing such as:

1. Providing service to only the commercial core along Cook Avenue;
2. Providing a larger system that would serve the Tumalo commercial core and residential areas west of the Deschutes River and north of U.S. 20.

The feasibility study provided cost estimates for construction and hook-up fees and monthly bills. The amounts vary widely depending on number of lots served, amount of grant funds acquired, connection fees, and monthly bills.

Community members have expressed concerns about being required to hook up to the system when a) their septic system begins to fail and b) the private system is within 300 feet or less to their property line and legally available. Staff received a massive stream of public comments expressing opposition toward a private system expanding into Tumalo and concerns about the private system being able to charge onerous fees to connect to the system. A smaller group, primarily those with commercial properties along Cook Avenue, supported the development of a sewer system.

The sewer feasibility study documented the estimated costs and timelines for a sewer system. Ultimately, whether a sewer authority is created, and a sewer system is provided in Tumalo will be a decision for the community, not the County.

---

<sup>1</sup> <https://online-voice.net/tumaloseweroptions/>

The formation of a sewer district is not a land use action and thus is outside the scope of the TCP. However, based on massive public input during the various TCP open houses, the TCP has added policy language specific to sewers.

**Emergency Services**

The Deschutes County Rural Fire Protection District #2, governed by an elected five-member volunteer Board of Directors, was established in 1952 to provide fire prevention, protection, and suppression services to residents living outside municipalities and areas not already served by established fire protection districts. In 1991, the district added emergency medical services. Today, District #2 covers approximately 140 square miles of suburban and forested land surrounding Bend and serves approximately 25,000 constituents. The average population of the district greatly increases seasonally due to tourism.

The actual delivery of fire and emergency medical services to district constituents is provided through a contract with the City of Bend Fire Department. Station 302 is located on 4<sup>th</sup> Street in Tumalo. The station was originally built in the early 1970s and a new building was constructed in 2019 to the immediate east. The station is staffed with an advance life support equipped fire engine, brush/interface pumper, and an ambulance.



**Irrigation Water**

Tumalo Town District Improvement Company (also known as the Tumalo Town Ditch Company) draws irrigation water based on three water right certificates with priority dates of 1904, 1905, 1938, 1950 and 1952. The system consists of a three-mile ditch that begins near the bridge at Tumalo State Park, parallels the river, crossing Bailey Road at the Tumalo Feed Company Restaurant, then continuing under U.S. 20 to the commercial district. The ditch serves approximately 43 customers and is used for irrigating lawns and gardens<sup>2</sup>.

North of the Tumalo commercial core, within the unincorporated community boundary, is a small residential enclave centered around Beaver Lane located within the Rimrock Water Improvement District. This District is owned and managed by a private water patron who distributes purchased water deliveries from Tumalo Irrigation District (TID) to the residential properties within this residential area. TID, first established through the construction of canal infrastructure in 1883 and organization as a district by 1922, diverts water from Tumalo Creek below Shevlin Park and the Deschutes River near Pioneer Park, with additional water storage through the Crescent Lake impoundment system. TID serves approximately 7,400 acres of irrigated lands to support livestock, hay, alfalfa, garlic, lavender and other crops and farm uses<sup>3</sup>. There are approximately 685 customers served by TID.

East of the Deschutes River, within the Tumalo unincorporated community boundary, are properties located within the Swalley Irrigation District. Swalley draws water based on a priority water right certificate dated September 1, 1899, and was incorporated as a municipal irrigation district in 1994 after 95 years of private ownership and operation. Swalley Irrigation District currently serves approximately 4,333 acres of irrigated lands around the vicinity of Tumalo, east of the Deschutes River and west of Highway 97. There are approximately 668 customers served by the Swalley Irrigation District.

**Recreational Trail**

The Bend Metro Park and Recreation District (Park District) provides parks, trails and recreation programming for residents encompassing the Bend Urban Area. Tumalo is located outside the district boundary by approximately two miles. However, the Park District does have recreational interests that extend outside its current boundary. In 2002, the Park District and the City of Bend collaborated on the development of the Deschutes River Trail (DRT) Action Plan. This plan identified the desire to complete the Deschutes River Trail through Bend and connect it on both ends to destinations outside the urban area. The development of the Riley Ranch Nature Reserve between O.B. Riley Road and the Deschutes River at the north end of Bend has helped extend the DRT. The ultimate northern extent of the planned DRT follows the Deschutes River from the Bend Urban Growth Boundary to Tumalo State Park and on to Tumalo. The Park District continues to work with private property owners and the Oregon State Parks and Recreation Department in an ongoing

<sup>2</sup> <https://www.tumalo.org/files/98649cf93/Water+User%27s+Handbook.pdf>

<sup>3</sup> <https://www.tumalo.org/about-us>

effort to assemble a continuous publicly owned corridor for the trail. Fortunately, the portions of the trail corridor closest to Tumalo are already in public ownership. The Park District and the County support the development of this trail corridor between Tumalo and Tumalo State Park as a hard-surfaced shared-use path that utilizes the current grade-separated crossing underneath the U.S. 20 bridge on the west bank of the Deschutes River. The State Historic Preservation Office (SHPO) has identified archeological resources that will need to be protected during the trail's construction and usage.

ODOT in 2022-23 is building a bicyclist/pedestrian-only underpass at U.S. 20/4<sup>th</sup> Street to make crossing the highway much easier. This multiuse path will connect to Bailey Road. The existing Twin Bridges State Scenic Bikeway would also utilize this shared-use path instead of the U.S. 20/Bailey-7<sup>th</sup> intersection as it does currently.

### **Transportation**

Tumalo requires a transportation network that provides safe and efficient through movements for traffic traveling on U.S. 20. Equally important is maintaining local access to residential and commercial areas, as well as the Tumalo Community School. U.S. 20 runs diagonally east-west through Tumalo and contains two travel lanes and a center turn lane. Its volumes and speed make north-south street connections challenging. ODOT has a two-lane roundabout at U.S. 20/Cook-O.B. Riley programmed for construction in 2023. The roundabout will add sidewalks along U.S. 20 for several hundred feet as well as along O.B. Riley and Cook. The roundabout will help lower speeds on U.S. 20, which is now posted at 45 mph down from the earlier posting of 55 mph.

There are three access points to U.S. 20: 5<sup>th</sup> Street; 7<sup>th</sup> Street/Bailey Road; and Cook Avenue/O.B. Riley Road. The first two have turn restrictions and only Cook/O.B. Riley will allow all movements. Within Tumalo, there are several paved and unpaved streets, totaling approximately 4.7 miles.

Average daily traffic (ADT) counts measured the following vehicles:

- 5<sup>th</sup> Street recorded 3,118 ADT (2022)
- Bailey Road, 1,234 ADT (2022)
- Cline Falls Hwy, 4,039 ADT (2022)
- Cook Avenue, 6,697 ADT (2022)
- Tumalo Road, 3,753 ADT (2022)
- O.B. Riley, 2,061 ADT (2022)
- U.S. 20, 0.10 miles east of Cline Falls Hwy, 10,276 ADT (2021)
- U.S. 20, 0.10 miles west of Cline Falls Hwy, 6,837 ADT (2021)

To protect the function of a highway, it is often necessary to limit access and control turning movements. ODOT limited the movements at U.S. 20/Bailey-7<sup>th</sup> to right-in, right-out only (RIRO) for 7<sup>th</sup> and RIRO and left-in at Bailey. There is also a raised refuge for bicyclists and pedestrians at U.S. 20/Bailey-7<sup>th</sup>. The two-lane roundabout will make U.S. 20/Bailey-7<sup>th</sup> into

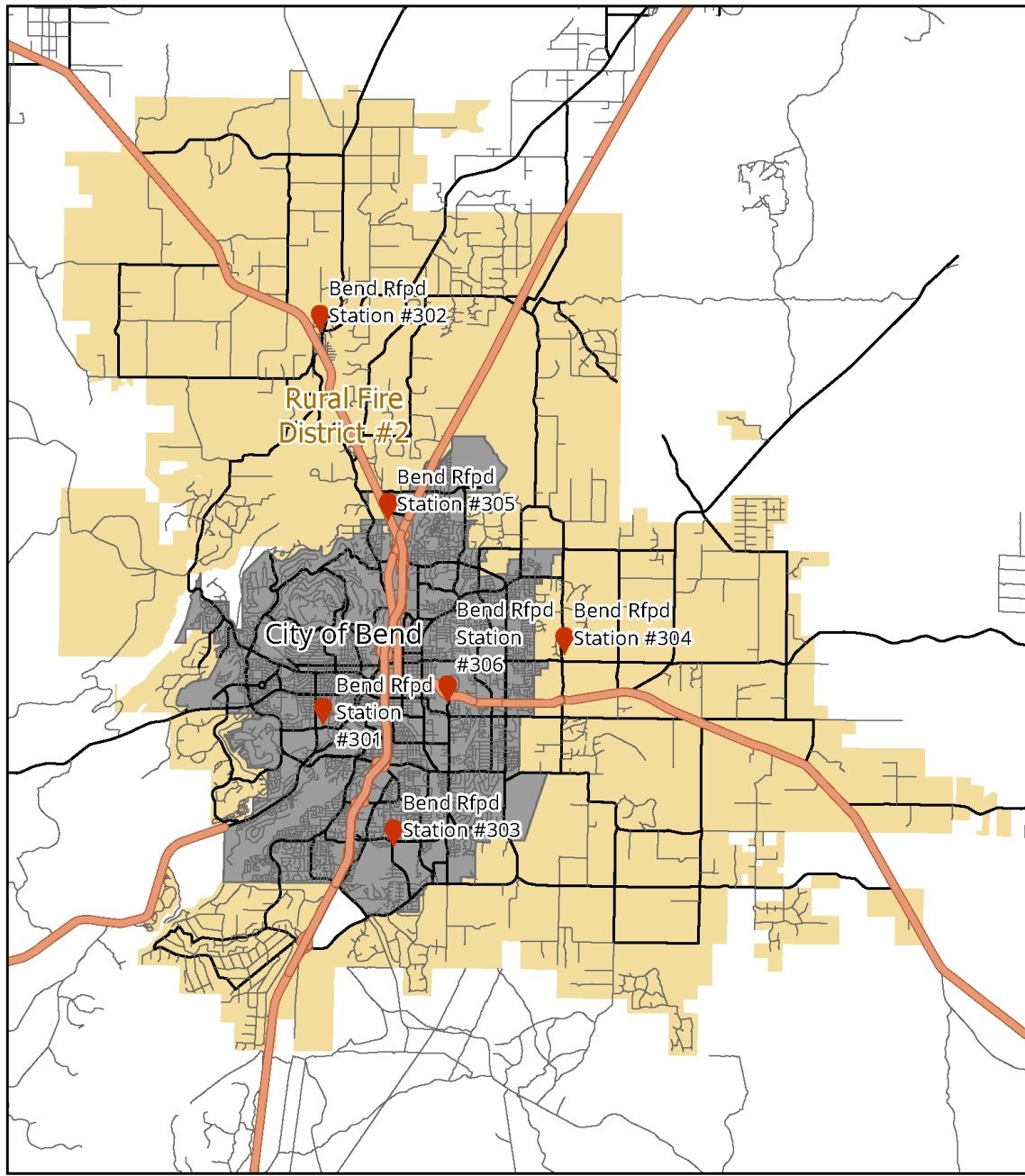
a RIRO intersection and Cook/8<sup>th</sup> will become a RIRO intersection as well. This will reduce the number of conflict points at these intersections. A conflict point is a location where vehicles turning or passing through can collide. By restricting turn movements or redirecting property access to side streets or alleys, the number of crashes on the highway and the local road system can be lowered. Implementing additional measures such as traffic calming, improved pedestrian crossings, or reducing the travel speed on the highway can benefit an entire community.

The County continues to provide sidewalk infill through both transportation improvements and requirements tied to land use approvals. Cascade East Transit (CET) master plan calls for examining a transit stop in Tumalo. Due to ADA requirements, the transit stop must be accessed via sidewalks. The current intent is to have the stop on Bruce Avenue between 5<sup>th</sup> and 7<sup>th</sup> once there is sidewalk.



The only change to the functional classification system was changing Cook Avenue from a collector to an arterial in the 2010-2030 Transportation System Plan (TSP).

DRAFT

### Rural Fire Protection District #2 Map



N:\Custom\County\CDD\Planning\TumaloCommunityPlan\ProjectFiles\TumaloCommunityPlan\_Maps

-  Fire Departments
-  Rural Fire District #2

### Tumalo Fire District



6/23/2022



# Surrounding Land Uses

---

Residents outside Tumalo identify with the area because it is where many buy certain goods and services, send their children to Tumalo Community School, attend church, or otherwise convene with other community members. The following Comprehensive Plan designations and related zoning districts are within a mile of the formal Tumalo unincorporated community boundary.

## Agriculture

An “Agricultural” designation and Exclusive Farm Use (EFU) zone protect farmlands in Deschutes County pursuant to Statewide Planning Goal 3 (Agricultural Lands). As discussed in the Agricultural Lands Section of the Comprehensive Plan, protecting farmlands is one of the primary goals of Oregon’s land use system. When the Comprehensive Plan was first adopted in 1979, there was general consensus for an agricultural goal:

*“To preserve agricultural land in Deschutes County for the production of farm and forestry products, as well as the public need for open space.”*

In 1992, Deschutes County completed a farm study report. The purpose of the study was to ensure that EFU zoning and standards for farm divisions and dwellings were consistent with Goal 3 and relevant administrative rules. The study found that farms in Deschutes County usually contained irrigated and non-irrigated land, as well as soils of different classes. The study identified seven agricultural subzones. For each subzone, standards determined minimum parcel sizes for farm divisions to protect the commercial agricultural land base. The subzone immediately adjacent to Tumalo is the Tumalo/Redmond/Bend subzone (EFUTRB). The minimum acreage for this subzone is 23 acres of irrigated land. Approximately 2.5 miles farther east, there are approximately fourteen (14) Alfalfa area subzone parcels (EFUAL) that allow a minimum of 36 acres of irrigated land. The EFUAL subzone parcels are intermixed with EFUTRB subzone parcels.

Since the latest Tumalo Community Plan update in 2010, there have been increased numbers of land divisions approved in the vicinity of Tumalo, some of which are designed to support both nonfarm and farm-related dwellings and accessory structures. Home Occupations, or home-based business uses have become increasingly common within the surrounding EFU lands. In addition to the increasing number of approved land divisions, EFU dwellings, and Home Occupations, the EFU lands surrounding Tumalo have also seen an increase in marijuana and hemp-related farm uses and structures since the statewide legalization of recreational marijuana and the passage of the 2018 farm bill allowing hemp production. Please refer to the Agricultural Lands section of the Comprehensive Plan for more details about agricultural land in Deschutes County.

**Rural Residential**

A “Rural Residential Exception Area” designation and corresponding Multiple Use Agriculture (MUA-10) zone apply to lands for which Deschutes County justified an “exception” to Statewide Planning Goal 3. Multiple Use Agriculture applies to agricultural lands that have been demonstrated to be unsuitable for commercial farming, but retain enough agricultural practices that are compatible with rural development. The minimum lot size for new subdivisions in this zoning district is ten acres. There are several MUA-10 subdivisions within a mile of Tumalo. Approximately one-half mile south of Tumalo lies the Cascades Academy, located on MUA-10 zoned property. Cascades Academy is a pre-kindergarten through 12<sup>th</sup> grade independent private school<sup>4</sup>.

**Surface Mining**

Located just outside Tumalo, a “Surface Mining” designation and corresponding Surface Mining (SM) zone authorize surface mining activities. This district allows development and use of mineral and aggregate resources consistent with Statewide Planning Goal 5 (Natural Resources, Scenic and Historic Areas, and Open Spaces). It applies to two properties in the immediate vicinity, one at the north end of Tumalo, west of the Deschutes River and the other, adjacent to U.S. 20 and bisected by O.B. Riley Road, known as the Knife River operation. The Knife River properties are allowed through a limited combining zone to store, crush, process, sell and distribute aggregate minerals. One additional surface mine designated property of approximately 75 acres is located 1 mile south of the Tumalo community boundaries.

**Flood Plain**

Several properties within the Tumalo unincorporated community and multiple parcels to the south and north are located within the Flood Plain Zoning District. These parcels are exclusively associated with the Deschutes River corridor and surrounding low-lying areas. The purpose of this zoning district is to protect the public from the hazards associated with flood plains; to conserve important riparian areas along rivers and streams for the maintenance of the fish and wildlife resources; and to preserve significant scenic and natural resources while balancing the public interests with those of individual property owners in the designated areas. Given the purpose of the zoning district, a majority of the flood plain designated areas outside of Tumalo are maintained as open spaces or otherwise undeveloped land, including portions of Tumalo State Park.

---

<sup>4</sup> <https://www.cascadesacademy.org/about>

**Open Space & Conservation**

Approximately one-half mile south of the Tumalo commercial core are properties within an “Open Space & Conservation” Zoning District, largely associated with the boundaries of Tumalo State Park and the contiguous Riley Ranch Nature Reserve, further south along the Deschutes River corridor. The purpose of this zoning district is to protect designated areas of scenic and natural resources; to restrict development in areas with fragile, unusual or unique qualities; to protect and improve the quality of the air, water and land resources and to plan development that will conserve open space<sup>5</sup>.



Photo: Tumalo State Park, Photo Credit: Hike Oregon

---

<sup>5</sup> DCC 18.48.010

# Conclusion

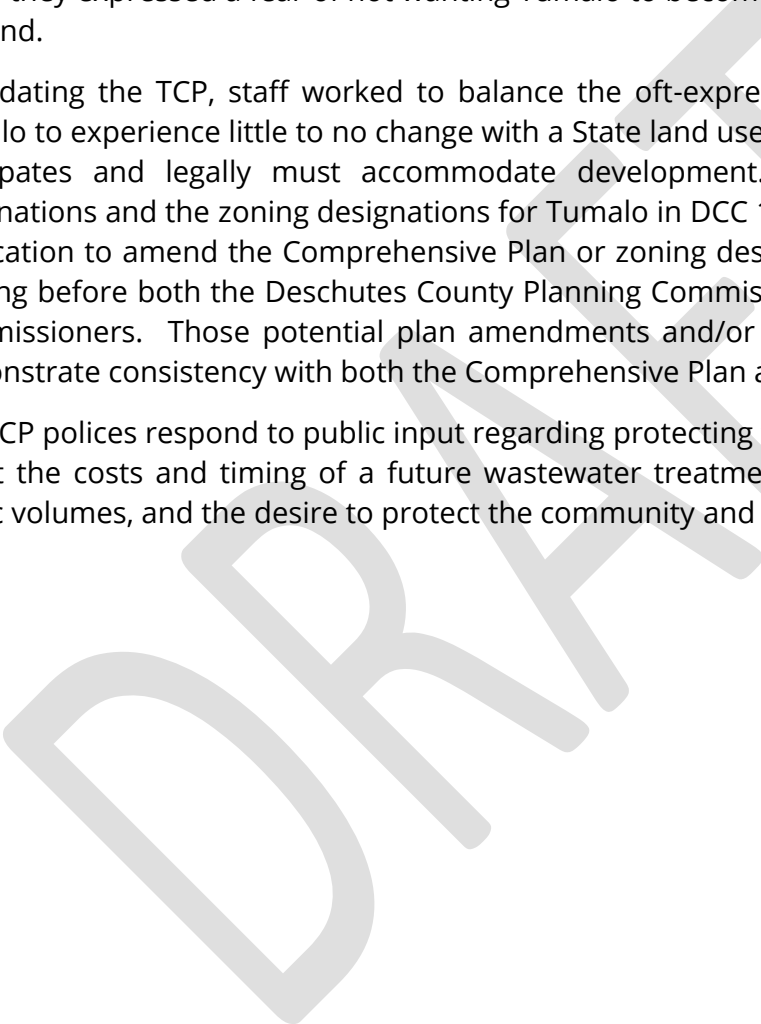
---

The TCP is the result of extensive outreach and interaction between staff and residents, business owners, property owners in Tumalo, and those who live near Tumalo and shop, recreate, or send their children to school there.

Nearly unanimously, respondents spoke of their deep affection for Tumalo and a sense of place. They valued the rural feel of Tumalo and appreciated the small-scale commercial core. Often they expressed a fear of not wanting Tumalo to become like Sisters or to be engulfed by Bend.

In updating the TCP, staff worked to balance the oft-expressed desire by the public for Tumalo to experience little to no change with a State land use system and County code that anticipates and legally must accommodate development. The Comprehensive Plan designations and the zoning designations for Tumalo in DCC 18.67 remain unchanged. Any application to amend the Comprehensive Plan or zoning designation would require public hearing before both the Deschutes County Planning Commission and the Board of County Commissioners. Those potential plan amendments and/or zone changes would have to demonstrate consistency with both the Comprehensive Plan and the TCP.

The TCP polices respond to public input regarding protecting the Deschutes River, concerns about the costs and timing of a future wastewater treatment system, the worries about traffic volumes, and the desire to protect the community and maintain its livability.



# Goals and Policies

---

The following policies are designed to address issues specific to the Tumalo Rural Unincorporated Community. The policies supplement existing Comprehensive Plan policies and were developed from input received by community members, stakeholders, and input from relevant agency partners.

The following policies and policies are designed to address issues specific to the Tumalo Rural Unincorporated Community. The policies supplement existing Deschutes County Comprehensive Plan policies and were developed from input received by community members, stakeholders, and input from relevant agency partners.

## Community Vision Statement

Retain the livability of Tumalo as a rural small town, through safe and efficient public services and collaborating with the surrounding rural area.

## Land Use Goal

Continue to implement a clear and transparent planning process and policy framework reflective of the community's small-town rural character.

## Land Use Policies

1. Conform land use regulations to the requirements of Unincorporated Communities as defined in OAR 660 Division 22 or any successor.
2. Ensure County plans and land use regulations comply with state requirements for agricultural uses in the Exclusive Farm Use (EFU) zones.
3. Encourage the preservation of historical structures such as the Tumalo Community Church (1905) and the Laidlaw Bank and Trust (1910).
4. Review the Tumalo Community Plan periodically to determine if it meets the current and future needs of the area.

## Natural Resources, Open Space, and Recreation Goal

Support the preservation and conservation of natural resources, cultural resources, and open space while providing ample and diverse opportunities for recreation.

## Natural Resources, Open Space, and Recreation Policies

1. Continue to support Tumalo as a regional bicycle destination.
2. Support community and agency partners in planning and development of a multiuse trail system from Tumalo State Park to Tumalo.
3. Encourage consolidation of designated access points to the Deschutes River and education of trail users to preserve riparian areas.
4. Encourage voluntary designation of open space and public access to Deschutes River on adjacent private properties.
5. Provide County perspective and support for community-based restoration projects to protect the health and vitality of the Deschutes River and its tributaries.
6. Preserve publicly owned lands along the Deschutes River as designated open space.
7. Collaborate with public, private, and nonprofit organizations on infrastructure improvements near recreation areas including formal river access points, wayfinding signage, lighting, or sanitary facilities.
8. Support community efforts to designate the segment of the Deschutes River through Tumalo as an Oregon Scenic Waterway for its recreational values.
9. Coordinate with community partners on the development of a trails and recreation master plan.
10. Assist in outreach to Oregon State Parks Department or municipal parks and recreation districts to explore the annexation of Tumalo into an existing district. Assess opportunities for access and parking improvements at heavily used river access points.
11. Explore whether the County should form a Parks and Recreation District as part of the County's Comprehensive Plan Update.
12. Coordinate with community partners on efforts to designate new parks and maintain local parks.
13. Encourage preservation or improvement of groundwater quality and the conservation of groundwater supplies.

- 14. Provide public educational outreach on the importance and benefits of water conservation, encouraging low water use, and drought tolerant landscaping.
- 15. Encourage Tumalo to become a fire-adapted community through the Firewise Program.

**Residential Area Goal**

Maintain the small-town character and feel of Tumalo, while accommodating the community's residential growth.

**Residential Area Policies**

- 1. Encourage density and design features that are compatible with existing development.
- 2. Permit livestock in the residential districts subject to use limitations.
- 3. Plan and zone for a diversity of housing types and densities suited to the capacity of the land to accommodate water and sewage requirements.

**Economic Development Goal**

Retain the economic vibrancy of Tumalo's historic core and industrial areas while providing economic development opportunities that are compatible with the small town rural character of the community.

**Economic Development Policies**

- 1. Encourage design standards in the commercial district so new development is compatible with the rural character of the community and reduces negative impacts on adjacent residential districts.
- 2. Explore alternatives to the solar setback standards for development within the commercial zoning districts of Tumalo.
- 3. Allow residential uses and mixed residential/commercial uses, without inhibiting future commercial development opportunities in the Commercial Zoning Districts.
- 4. Support economic development initiatives and tourism in the Tumalo area.
- 5. Allow for existing and future uses without producing adverse effects upon water resources or wastewater disposal. Coordinate with relevant agencies to ensure industrial uses meet requirements for water availability and wastewater disposal.
- 6. Limit industrial activities to low-impact uses that rely on rural resources as defined in OAR 660-004-0022(3)(a).

- 7. Limit industrial activities to low-impact uses that rely on rural resources as defined in OAR 660-004-0022(3)(a).

**Public Facilities Goal**

Ensure irrigation, domestic water, wastewater, and other utility systems are safe, efficient, and economical.

**Public Facility Policies**

- 1. Consider water and wastewater capacity when assessing development capabilities on individual lots in Tumalo.
- 2. Promote efficient water and wastewater systems in new development to manage water resources carefully.
- 3. Encourage early planning and acquisition of sites needed for public facilities.
- 4. Support replatting of lots in the area comprising the Laidlaw Plat and other lands designated commercial to create lots large enough to accommodate a DEQ approved on-site sewage disposal system, or connection to a public sewer system if available, consistent with the findings of the Tumalo Sewer Feasibility Study (2022).
- 5. Coordinate with local Irrigation Districts and the Tumalo Town Ditch to avoid adverse effects on their infrastructure and distribution systems.
- 6. Maintain efforts to ensure the Tumalo domestic water system complies with public health regulations and state and federal water quality regulations.
- 7. If Tumalo residents initiate district formation, coordinate with the residents and business owners on the creation of a public sewer district.
- 8. Explore legislative approaches to preclude non-voluntary connections to private sewer systems.
- 9. Explore with Department of Environmental Quality (DEQ) to determine whether a property owner can record a land use provision stating a private sewer is not lawfully available under Oregon Administrative Rule (OAR) 340-040-0160 unless the land owner voluntarily consents to the connection.
- 10. Prohibit private sewers in Tumalo, unless the property owners of the lots in the Laidlaw Plat, Deschutes River Tract, and Deschutes River Homesite Rimrock Addition form a district and vote on the issue.



**Transportation Goal**

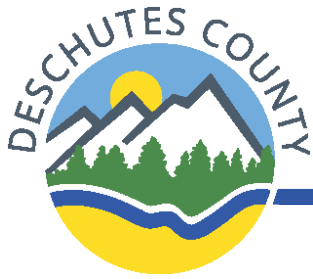
Provide a safe and efficient system for all modes of transportation, including bicycle, pedestrian, and transit, to support local economic development, recreational uses, and community health.

**Road Network Policies**

1. Periodically review the Transportation System Plan policies and standards for Tumalo to reflect best practices.
2. Periodically review existing roadway design requirements to ensure complete streets which accommodate all modes of travel.
3. Collaborate with the Oregon State Police and Deschutes County Sheriff's Office to address speeding within Tumalo.
4. Encourage ODOT to use its "Blueprint for Urban Design" for U.S. 20 projects to enhance the roadside environment by signage, accommodating alternate modes, roadside amenities, and landscaping.

**Road and Sidewalk Policies**

1. Implement road development standards for Tumalo that are consistent with the small-scale character of the community.
2. Utilize land development and grant funding opportunities to improve street segments identified for improvement in the Transportation System Plan.
3. Provide functional, cost-effective sidewalks within the commercial core while preserving the rural character of the residential areas.
4. Provide sidewalks or multiuse paths where they are needed for safety, as set forth in the Transportation System Plan.
5. Construct sidewalks specified on community roads without curbs and gutters and allow adequate room for utilities.
6. Provide wayfinding signage and maintenance best practices on County arterials and collectors to ensure safe and accessible routes for all users.
7. Review Deschutes County Code (DCC) 17.48, Table B, Minimum Bikeway Design Standards, and consider revising widths of multiuse paths from 8 feet to 10 feet and up to 12 feet in areas with high mixed use.



**STAFF FINDINGS**

**FILE NUMBER(S):** 247-23-000509-PA/510-TA

**SUBJECT PROPERTY/  
OWNER:** N/A

**APPLICANT:** Deschutes County Planning Division  
P.O Box 6005  
Bend, OR 97708

**REQUEST:** Replace the 2010-2030 Tumalo Community Plan with the 2020-2040 Tumalo Community Plan, including updated Goals and Policies

**STAFF CONTACT:** Tarik Rawlings, Senior Transportation Planner  
Phone: 541-317-3148  
Email: [Tarik.Rawlings@deschutes.org](mailto:Tarik.Rawlings@deschutes.org)

**RECORD:** Record items can be viewed and downloaded from:  
[www.buildingpermits.oregon.gov](http://www.buildingpermits.oregon.gov)

Record items can be viewed and downloaded from:  
<https://www.deschutescounty.gov/cd/page/tumalo-community-plan-update-2020-2040-247-23-000509-pa-510-ta>

**I. APPLICABLE CRITERIA**

Deschutes County Code (DCC)  
Title 22, Deschutes County Development Procedures Ordinance  
Chapter 22.012, Legislative Procedures

Oregon Administrative Rule (OAR)  
OAR 660-015, Statewide Planning Goals and Guidelines  
OAR 660-022, Unincorporated Communities

Deschutes County Comprehensive Plan – Title 23  
Chapter 1, Comprehensive Planning

Chapter 4, Urban Growth Management

**II. BASIC FINDINGS**

**PROPOSAL**

This is a legislative plan and text amendment to the Deschutes County Comprehensive Plan to remove the 2010-2030 Tumalo Community Plan (TCP) and replace it with the 2020-2040 TCP. Tumalo is a Rural Unincorporated Community under OAR 660-022-0010(7). The TCP is Section 4.7 within the Deschutes County Comprehensive Plan. The TCP provides a Community Vision Statement, goals, and polices unique to Tumalo. The 2020-2040 TCP update includes several new goals and policies; updates information for population, traffic volumes, land use consumption; recaps general changes within the community; and identified issues of public concern.

**BACKGROUND**

In 2010, County staff prepared a Community Plan for Tumalo. As that plan is now halfway through its lifespan and Tumalo has undergone several changes in population, different types of land uses, and increased tourism, the County began the process in 2022 to update the TCP. This update was done concurrently with an update of the bike, pedestrian, and transit components of the TCP.

**REVIEW CRITERIA**

Deschutes County lacks specific criteria in DCC Titles 18, 22, or 23 for reviewing a legislative plan and text amendment. Nonetheless, since Deschutes County is initiating one, the County bears the responsibility for justifying that the amendments are consistent with Statewide Planning Goals and the County’s Comprehensive Plan.

**III. FINDINGS & CONCLUSIONS**

**CHAPTER 22.12, LEGISLATIVE PROCEDURES**

Section 22.12.010.

***Hearing Required***

**FINDING:** This criterion will be met because a public hearing will be held before the Deschutes County Planning Commission on August 10, 2023, and a future public hearing will be held before the Board of County Commissioners.

Section 22.12.020, Notice

**Notice**

**A. Published Notice**

- 1. Notice of a legislative change shall be published in a newspaper of general circulation in the county at least 10 days prior to each public hearing.**
- 2. The notice shall state the time and place of the hearing and contain a statement describing the general subject matter of the ordinance under consideration.**

**FINDING:** This criterion is met as notice was published in the Bend Bulletin newspaper on July 20<sup>th</sup>, 2023 for the Planning Commission public hearing and additional published notice will be sent for the Board of County Commissioners’ public hearing.

**B. Posted Notice. Notice shall be posted at the discretion of the Planning Director and where necessary to comply with ORS 203.045.**

**FINDING:** Posted notice was determined by the Planning Director not to be necessary.

**C. Individual notice. Individual notice to property owners, as defined in DCC 22.08.010(A), shall be provided at the discretion of the Planning Director, except as required by ORS 215.503.**

**FINDING:** Given the proposed legislative amendments do not apply to any specific property, no individual notices were sent.

**D. Media notice. Copies of the notice of hearing shall be transmitted to other newspapers published in Deschutes County.**

**FINDING:** Notice was provided to the County public information official for wider media distribution. This criterion is met.

Section 22.12.030 Initiation of Legislative Changes.

**A legislative change may be initiated by application of individuals upon payment of required fees as well as by the Board of County Commissioners.**

**FINDING:** The application was initiated by the Deschutes County Planning Division at the direction of the Board of County Commissioners and has received a fee waiver. This criterion is met.

Section 22.12.040. Hearings Body

- A. The following shall serve as hearings or review body for legislative changes in this order:**
  - 1. The Planning Commission.**
  - 2. The Board of County Commissioners.**

**B. Any legislative change initiated by the Board of County Commissioners shall be reviewed by the Planning Commission prior to action being taken by the Board of Commissioners.**

**FINDING:** The Deschutes County Planning Commission held the initial public hearing on August 10, 2023. The Board will hold a public hearing on a future date to be determined. These criteria are or will be met.

Section 22.12.050 Final Decision

**All legislative changes shall be adopted by ordinance**

**FINDING:** The proposed legislative changes will be implemented by ordinance, number to be determined, upon approval and adoption by the Board of County Commissioners. This criterion will be met.

**OAR 660-015, Statewide Planning Goals and Guidelines**

Goal 1: Citizen Involvement:

**FINDING:** Deschutes County mailed notice to every property in Tumalo prior to Open House #1 (May 11, 2022) and posted flyers at various gathering centers. The latter locations included the bulletin boards for Tumalo’s only gas station/convenience store, veterinary clinic, irrigation district offices, pizza parlor, Tumalo Community School, and post office. Open House #1 was the TCP kick off meeting and an opportunity for attendees to voice their opinions about vision statement, goals, policies, and issues of importance. Other opportunities for public comment and dialogue occurred via Meet A Planner meetings (June 20-24, 2022) which were scheduled face-to-face, one-on-one 30-minute sessions on the TCP update; County-held virtual open houses; and surveys (June 29-July 22, 2022). Open Houses #2 (August 22, 2022) and #3 (May 17, 2023) presented draft and final versions of the TCP with revisions based on public feedback. A second round of Meet A Planner meetings was offered (May 2-9, 2023). The County also created a website and an explanatory Story Map to garner public input throughout the process (<https://www.deschutes.org/cd/page/tumalo-community-plan-update>). The 2020-2040 TCP is therefore consistent with Goal 1.

Goal 2: Land Use Planning:

**FINDING:** The TCP 2020-2040 does not change any Comprehensive Plan designations or zoning designations in DCC 18.67, Tumalo Rural Community Zoning. The update is the subject of land use file 247-23-000509-PA/510-TA and will be processed under the County’s procedures for a legislative amendment. On July 6, 2023, the County provided the required 35-day prior notice to the Department of Land Conservation and Development (DLCD) before the first evidentiary hearing. The 2020-2040 TCP is therefore consistent with Goal 2.

Goal 3: Agricultural Lands:

**FINDING:** Tumalo does not contain any lands with the Comprehensive Plan designation of Agriculture nor the zoning designation of Exclusive Farm Use (EFU). However, EFU properties abut

Tumalo and the following TCP 2020-2040 Land Use Policy #2 states that County plans and regulations must comply with state requirements for EFU lands. The TCP does not propose any changes to existing EFU zoning. The 2020-2040 TCP is therefore consistent with Goal 3.

Goal 4: Forest Lands:

**FINDING:** There are no lands designated Forest, either by Comprehensive Plan or DCC 18.67, within or abutting Tumalo. The TCP does not change any Forest zoning. Additionally, the majority of trees within the vicinity of Tumalo are juniper trees, which are not considered a commercially viable tree or a species that is commonly suitable for the production of merchantable trees. Therefore, either Goal 4 does not apply to the 2020-2040 or the application is consistent with Goal 4.

Goal 5: Open Spaces, Scenic and Historic Areas, and Natural Resources:

**FINDING:** The TCP 2020-2040 does not propose any changes to any Goal 5 resources. Two historic buildings in Tumalo are listed in the County's Goal 5 resources. The 2020-2040 TCP has a Natural Resources, Open Space, and Recreation Goal supporting the protection and conservation of natural resources, cultural resources, and open space. Various TCP polices address the elements and intent of Goal 5. Land Use Policy #3 encourages the preservation of historical structures in Tumalo such as the Tumalo Community Church (1905) and the Laidlaw Bank and Trust (1910). Natural Resources, Open Space, and Recreation Policies #4 and #6 address open space; Policies #3, #6-10 address the Deschutes River. The TCP proposes no changes to the County's Landscape Management (LM) overlay zone nor the Surface Mining Impact Area (SMIA) zones, which protect scenic view and aggregate mining, respectively. Therefore, the 2020-2040 TCP is consistent with Goal 5.

Goal 6: Air, Water and Land Resources Quality:

**FINDING:** The TCP has several goals and policies that address this goal. Specifically, Natural Resources, Open Space, and Recreation Policies #5, #13, and #14; Residential Policy #3; Economic Development Policies #1, #3, and #5-#7; the Public Facility Goal and Public Facility Policies #1-#10. In total, the policies will protect the quality of the air, water, and resources within Tumalo. Therefore, the 2020-2040 TCP is consistent with Goal 6.

Goal 7: Areas Subject to Natural Disasters and Hazards:

**FINDING:** The Comprehensive Plan in Section 3.5 lists the following natural hazards endemic to Deschutes County: wildfire, snowstorms, flooding, and volcanic eruptions and earthquakes. Tumalo has a fire station and the Natural Resources, Open Space, and Recreation Policy #15 encourages Tumalo to become a fire-adapted community through the Firewise Program. The Road Department plows County-maintained roads in Tumalo while ODOT plows U.S. 20. The TCP does not change any existing building codes regarding snow loads or structural resistance to earthquakes. Therefore, the 2020-2040 TCP is consistent with Goal 7.

Goal 8: Recreational Needs:

**FINDING:** The major recreational draws to Tumalo are the Deschutes River and the State-designated Twin Bridges Scenic Bikeway, which uses Bailey Road, Cook Avenue, and Cline Falls Road. The Natural Resources, Open Space, and Recreation Goal and its Policies #1-4; and #7-#12 address these needs specifically. The Transportation Goal references supporting recreational uses of the road and sidewalk system. Therefore, the 2020-2040 TCP is consistent with Goal 8.

Goal 9: Economic Development:

**FINDING:** The TCP will not change any of the uses allowed outright or conditionally in the residential, commercial, industrial, or research and development zones in DCC 18.67 (Tumalo Rural Community). The following goal and policies support economic development in Tumalo: Land Use Policy #4; Economic Development Goal and Economic Development Policies #1-#7. Economic Development Policies #3 and #4 particularly support development in the commercial core and supporting economic development initiatives and tourism as the latter brings revenues into the community. Therefore, the 2020-2040 TCP is consistent with Goal 9.

Goal 10: Housing:

**FINDING:** This goal is not applicable because unlike municipalities, unincorporated areas are not obligated to fulfill certain housing requirements. Tumalo is classified as a Rural Unincorporated Community under OAR 660-022-0010(7). The TCP does contain a Residential Goal and Residential Policies #1 and #3 to encourage a mix of housing types. Therefore, if it were applicable, the 2020-2040 TCP would be consistent with Goal 10.

Goal 11: Public Facilities and Services:

**FINDING:** The majority of Tumalo is on septic; there is a private wastewater system, Tumalo Property Owners Association (TPOA), which serves a small area on the south side of U.S. 20. Water, either for drinking or irrigation, is provided by private companies or private wells. The TCP contains a Public Facilities Goal as well as Public Facilities Policies #1-#10. The community was quite concerned about private sewers in Tumalo. Public Facilities Policies #3, #4, and #7 address public sewer systems while Policies #8, #9, and #10 address private sewer systems. Policies #1, #2, and #6 pertain to wastewater facilities regardless of public or private. Taken together, the Public Facilities goal and policies will protect Tumalo’s current and future water and wastewater issues. The updated TCP does not propose any changes to the County’s regulations regarding public facilities and services. Therefore the 2020-2040 TCP complies with Goal 11.

Goal 12: Transportation:

**FINDING:** The County’s Transportation System Plan (TSP) is also being updated to 2040 to continue to provide a safe, convenient, and efficient economical transportation system. The TCP proposed Transportation Goal is to provide and encourage a safe, convenient, and economical transportation system. The Transportation Goal calls for such a transportation system for all modes and to support economic development, recreation, and community health. Of the specific transportation issues raised by the community, Road Network Policy #3 addresses speeding while Policy #4 calls for ODOT to use designs consistent with Tumalo’s enduring vision of maintaining its small-town feel. Road and Sidewalk Policy #3 calls for sidewalks in the commercial core, but not in the residential neighborhoods to preserve their rural character. Road and Sidewalk Policies #6 and #7 will lead to a better experience for cyclists and pedestrians. The 2020-2040 TCP does not propose changes in the functional classification of any existing or planned transportation facility nor does it propose changes to any performance standards or access standards. Therefore, the 2020-2040 TCP is consistent with Goal 12.

Goal 13: Energy Conservation:

**FINDING:** As a Rural Unincorporated Community with a 30-foot height limit, Tumalo has minimal opportunities for infill or increased density, which can be used as a strategy for energy conservation. However, the various Transportation policies encourage energy-saving alternate modes, especially bicycling and walking. The small lots can make solar energy utilization impractical due to shadows from nearby structures. Economic Development Policy #2 addresses the issue. The 2020-2040 TCP does not propose to change the County's Plan or implementing regulations regarding energy conservation. Therefore, the 2020-2040 TCP is consistent with Goal 13.

Goal 14: Urbanization:

**FINDING:** Tumalo is a Rural Unincorporated Community under OAR 660-022-0010(7) and has no Urban Growth Boundary (UGB). As Tumalo by definition is rural, Goal 14 does not apply.

Goals 15 through 19

**FINDING:** These goals are not applicable to the proposed plan and text amendments because the County does not contain these types of lands.

**OAR 660-022, Unincorporated Communities**

**FINDING:** OAR 660-022-0030(1) requires counties to provide zoning designations for all properties within an unincorporated community. Deschutes County has done so via DCC 18.67. The 2020-2040 TCP is not adding any new zones nor changing any uses allowed either outright or conditionally. The 2020-2040 TCP is therefore consistent with OAR 660-022.

**Deschutes County Comprehensive Plan**

**FINDING:** The relevant portions of the Comprehensive Plan are Chapter 1 (Comprehensive Planning), which sets the goals and policies of how the County will involve the community and conduct land use planning. These are specified in Section 1.2 (Community Involvement) and Section 1.3 (Land Use Planning). Chapter 4 (Urban Growth Management) and Sections 4.3 (Unincorporated Communities) and 4.7 (Tumalo Community Plan) are also applicable.

Section 1.2 sets a goal for an open and active community involvement program that engages the public during development of land use policies and codes. Policy 1.2.2 designates the Planning Commission as the Committee for Community Involvement. Policies 1.2.3 and 1.2.4 detail procedures for public outreach and avenues of outreach. As described above, the County complied with DCC 22.12 for a legislative amendment, including notice to the public, DLCD, and relevant agencies. Both the Planning Commission and Board will conduct separate public hearings and objectively evaluate the facts. Additionally, staff conducted extensive public outreach via flyers, email, open houses, website, and work sessions with the PC and the Board, which were open to the public and broadcast online.

Section 1.3 sets a goal of an open and public land use process to reach fact-based decisions. Policies 1.3.1 calls for protection of private-property rights and Policies through 1.3.2 through 1.3.9 concern public involvement, record keeping, use of websites, and review periods for the Comprehensive Plan. The 2020-2040 TCP does not identify any properties to be transferred from private to public



ownership; policies state clearly what is voluntary if private property is involved; policies regarding private sewers also would protect rights of private property owners that could be served by a private sewer. For the development of the TCP, the County has done extensive public outreach using traditional methods (flyers, face-to-face meetings) and newer methods (website, online public meetings, electronic records, video meetings, etc.)

Section 4.3 defines, lists, and categorizes Unincorporated Communities. Tumalo is a Rural Community and was approved in 1997. Section 4.3 does not have any goals or policies.

Section 4.7 is the Tumalo Community Plan itself and is incorporated into the Comprehensive Plan as Appendix B.

Based on the above, the 2020-2040 TCP is consistent with the Deschutes County Comprehensive Plan.

**IV. CONCLUSION**

The proposed 2020-2040 TCP complies with all relevant Deschutes County and OAR requirements.

# Goals and Policies

**Green** = Unchanged language in 2010-2030 TCP or unchanged but in a new section

**Blue** = Language in 2010-2030 TCP, but slightly modified for tense, terms, clarity (See spreadsheet for actual changes and further details in "Notes" section)

**Yellow** = Brand new language for 2020-2040 TCP in response to public comments

The following policies and policies are designed to address issues specific to the Tumalo Rural Unincorporated Community. The policies supplement existing Deschutes County Comprehensive Plan policies and were developed from input received by community members, stakeholders, and input from relevant agency partners.

## Community Vision Statement

Retain the livability of Tumalo as a rural small town, through safe and efficient public services and collaborating with the surrounding rural area.

## Land Use Goal

Continue to implement a clear and transparent planning process and policy framework reflective of the community's small-town rural character.

## Land Use Policies

1. Conform land use regulations to the requirements of Unincorporated Communities as defined in OAR 660 Division 22 or any successor.
2. Ensure County plans and land use regulations comply with state requirements for agricultural uses in the Exclusive Farm Use (EFU) zones.
3. Encourage the preservation of historical structures such as the Tumalo Community Church (1905) and the Laidlaw Bank and Trust (1910).
4. Review the Tumalo Community Plan periodically to determine if it meets the current and future needs of the area.

## Natural Resources, Open Space, and Recreation Goal

Support the preservation and conservation of natural resources, cultural resources, and open space while providing ample and diverse opportunities for recreation.

## Natural Resources, Open Space, and Recreation Policies

1. Continue to support Tumalo as a regional bicycle destination.
2. Support community and agency partners in planning and development of a multiuse trail system from Tumalo State Park to Tumalo.
3. Encourage consolidation of designated access points to the Deschutes River and education of trail users to preserve riparian areas.
4. Encourage voluntary designation of open space and public access to Deschutes River on adjacent private properties.
5. Provide County perspective and support for community-based restoration projects to protect the health and vitality of the Deschutes River and its tributaries.
6. Preserve publicly owned lands along the Deschutes River as designated open space.
7. Collaborate with public, private, and nonprofit organizations on infrastructure improvements near recreation areas including formal river access points, wayfinding signage, lighting, or sanitary facilities.
8. Support community efforts to designate the segment of the Deschutes River through Tumalo as an Oregon Scenic Waterway for its recreational values.
9. Coordinate with community partners on the development of a trails and recreation master plan.
10. Assist in outreach to Oregon State Parks Department or municipal– parks and recreation districts to explore the annexation of Tumalo into an existing district. Assess opportunities for access and parking improvements at heavily used river access points.
11. Explore whether the County should form a Parks and Recreation District as part of the County’s Comprehensive Plan Update.
12. Coordinate with community partners on efforts to designate new parks and maintain local parks.
13. Encourage preservation or improvement of groundwater quality and the conservation of groundwater supplies.
14. Provide public educational outreach on the importance and benefits of water conservation, encouraging low water use, and drought tolerant landscaping.
15. Encourage Tumalo to become a fire-adapted community through the Firewise Program.

### **Residential Area Goal**

Maintain the small town character and feel of Tumalo, while accommodating the community’s residential growth.

### **Residential Area Policies**

1. Encourage density and design features that are compatible with existing development.
2. Permit livestock in the residential districts subject to use limitations.
3. Plan and zone for a diversity of housing types and densities suited to the capacity of the land to accommodate water and sewage requirements.

### **Economic Development Goal**

Retain the economic vibrancy of Tumalo’s historic core and industrial areas while providing economic development opportunities that are compatible with the small town rural character of the community.

### **Economic Development Policies**

1. Encourage design standards in the commercial district so new development is compatible with the rural character of the community and reduces negative impacts on adjacent residential districts.
2. Explore alternatives to the solar setback standards for development within the commercial zoning districts of Tumalo.
3. Allow residential uses and mixed residential/commercial uses, without inhibiting future commercial development opportunities in the Commercial Zoning Districts.
4. Support economic development initiatives and tourism in the Tumalo area.
5. Allow for existing and future uses without producing adverse effects upon water resources or wastewater disposal. Coordinate with relevant agencies to ensure industrial uses meet requirements for water availability and wastewater disposal.
6. Limit industrial activities to low-impact uses that rely on rural resources as defined in OAR 660-004-0022(3)(a).
7. Limit industrial activities to low-impact uses that rely on rural resources as defined in OAR 660-004-0022(3)(a).

## Public Facilities Goal

Ensure irrigation, domestic water, wastewater, and other utility systems are safe, efficient, and economical.

## Public Facility Policies

1. Consider water and wastewater capacity when assessing development capabilities on individual lots in Tumalo.
2. Promote efficient water and wastewater systems in new development to manage water resources carefully.
3. Encourage early planning and acquisition of sites needed for public facilities.
4. Support replatting of lots in the area comprising the Laidlaw Plat and other lands designated commercial to create lots large enough to accommodate a DEQ approved on-site sewage disposal system, or connection to a public sewer system if available, consistent with the findings of the Tumalo Sewer Feasibility Study (2022).
5. Coordinate with local Irrigation Districts and the Tumalo Town Ditch to avoid adverse effects on their infrastructure and distribution systems.
6. Maintain efforts to ensure the Tumalo domestic water system complies with public health regulations and state and federal water quality regulations.
7. If Tumalo residents initiate district formation, coordinate with the residents and business owners on the creation of a public sewer district.
8. Explore legislative approaches to preclude non-voluntary connections to private sewer systems.
9. Explore with Department of Environmental Quality (DEQ) to determine whether a property owner can record a land use provision stating a private sewer is not lawfully available under Oregon Administrative Rule (OAR) 340-040-0160 unless the land owner voluntarily consents to the connection.
10. Prohibit private sewers in Tumalo, unless the property owners of the lots in the Laidlaw Plat, Deschutes River Tract, and Deschutes River Homesite Rimrock Addition form a district and vote on the issue.

## Transportation Goal

Provide a safe and efficient system for all modes of transportation, including bicycle, pedestrian, and transit, to support local economic development, recreational uses, and community health.

### Road Network Policies

1. Periodically review the Transportation System Plan policies and standards for Tumalo to reflect best practices.
2. Periodically review existing roadway design requirements to ensure complete streets which accommodate all modes of travel.
3. Collaborate with the Oregon State Police and Deschutes County Sheriff's Office to address speeding within Tumalo.
4. Encourage ODOT to use its "Blueprint for Urban Design" for U.S. 20 projects to enhance the roadside environment by signage, accommodating alternate modes, roadside amenities, and landscaping.

### Road and Sidewalk Policies

1. Implement road development standards for Tumalo that are consistent with the small-scale character of the community.
2. Utilize land development and grant funding opportunities to improve street segments identified for improvement in the Transportation System Plan.
3. Provide functional, cost-effective sidewalks within the commercial core while preserving the rural character of the residential areas.
4. Provide sidewalks or multiuse paths where they are needed for safety, as set forth in the Transportation System Plan.
5. Construct sidewalks specified on community roads without curbs and gutters and allow adequate room for utilities.
6. Provide wayfinding signage and maintenance best practices on County arterials and collectors to ensure safe and accessible routes for all users.
7. Review Deschutes County Code (DCC) 17.48, Table B, Minimum Bikeway Design Standards, and consider revising widths of multiuse paths from 8 feet to 10 feet and up to 12 feet in areas with high mixed use.

TUMALO COMMUNITY PLAN REVISIONS TO GOALS AND POLICIES				
Action	2020 Text	2010 Text	Notes	Key
<i>GOAL AND POLICIES INTRO PARAGRAPH</i>				
Modification	The following goals and policies are designed to address issues specific to the Tumalo Rural Unincorporated Community. The policies supplement existing Deschutes County Comprehensive Plan policies and were developed with input received from community members, stakeholders, and relevant agency partners.	The following goals and policies were developed from community and stakeholder meetings, and input from ODOT and the Oregon Department of Land Conservation and Development. Staff also revisited Deschutes County's existing Comprehensive Plan and Transportation System Plan, as well as applicable state law and administrative rules.	Text specifies to area zoned as Tumalo; ODOT, DLCD minimally involved in update; deleted reference to state laws and administrative rules as staff found these redundant; the County would not create a plan that violated and was inconsistent with state laws and administrative rules.	Unchanged = 2020 & 2010 text is the same; Modification = Minor change in text; Revision = Major change in text; Addition = new text; Deletion = text eliminated
<i>COMMUNITY VISION STATEMENT</i>				
Modification	Retain the livability of Tumalo as a rural small town, by ensuring safe and efficient public services and collaborating with the surrounding rural area.	Retain the livability of Tumalo as a rural small-town, by ensuring safe and efficient public services and collaborating with the surrounding rural community.	Delete hyphen in small-town; change community to area as "community" has specific use in OAR 660-022; "area" consistent with intent of vision statement.	
<i>LAND USE GOAL</i>				
Revision	Continue to implement a clear and transparent planning process framework and policy reflective of the community's small town rural character.	Protect and enhance the rural small-town character of Tumalo by supporting public services, healthy active lifestyles and social connections among residents and stakeholders	2010 goal went far beyond land use; seemed to be more of a vision. 2020 text more closely related to land use planning.	
<i>LAND USE POLICIES</i>				
Unchanged	Conform land use regulations to the requirements of Unincorporated Communities as defined in OAR 660 Division 22 or any successor	2020 and 2010 language are the same	None	
Revision	Ensure County plans and land use regulations comply with state requirements for agricultural uses in the Exclusive Farm Use (EFU) zone; explore larger setback requirements structures from property lines shared with EFU properties.	Ensure County plans and land use regulations require that new uses authorized within Tumalo do not adversely affect agricultural uses in the surrounding exclusive farm use (sic) zones.	Edited for brevity, but consistent with intent of 2010 text.	
Unchanged	Encourage the preservation of historical structures such as the Tumalo Community Church (1905) and the Laidlaw Bank and Trust (1910).	2020 and 2010 language are the same	None	
Modification	Review the Tumalo Community Plan periodically to determine if it meets the current and future needs of the area.	Review the Tumalo community goals and policies every five years to determine if they meet the current and future needs of the area.	Changed goals and policies to entire plan; changed five years to periodically for flexibility; moved from 2010 Community Policies to 2020 Land Use Policies. Review could be sooner than five years or longer, depending upon circumstances.	
Deletion	N/A	Apply setbacks for homes built along the rim forming Deschutes River Canyon and Laidlaw Butte to protect scenic views visible from the community.	Issue addressed in Deschutes County Code (DCC) 18.116.160 for the river; a butte by geographic terms is not a rim.	

Deletion	N/A	Coordinate with Tumalo Community Association, Tumalo Business Association, and similar local organizations on land use issues, where appropriate.	TCA and TBA apparently no longer exist nor have any analogous entities appeared. DCC 22 requires notice of land use applications both by sign and mailed notice to properties within 250 feet of subject property and notices of public hearings. DCC 22.20 and 22.24 contain public notice requirements for quasi-judicial land use applications; DCC 22.12 sets notice requirements for legislative land use applications.
<i>NATURAL RESOURCES, OPEN SPACE, AND RECREATIONAL GOAL</i>			
Addition	Support the preservation and conservation of natural resources, cultural resources, and open space while providing ample and diverse opportunities for recreation.	None	Natural Resources, Open Space, and Recreation Goal added to 2020 plan; 2010 did not have one.
<i>NATURAL RESOURCES, OPEN SPACE, AND RECREATION POLICIES</i>			
Revision	Continue to support Tumalo as a regional bicycle destination.	Establish Tumalo as a regional bicycle destination through land use, transportation, and recreation policies and programs.	2020 language recognizes Tumalo's current status, especially after establishment of Twin Bridges State Scenic Bikeway through town.
Revision	Support community and agency partners in planning and development of a multi-use trail system from Tumalo State Park to Tumalo	Establish a multi-use trail system from Tumalo State Park to Tumalo.	New text recognizes County does not have Parks and Recreation District and thus cannot let, yet 2020 text remains consistent with intent of 2010 text.
Revision	Encourage consolidation of designated access points to the Deschutes River and education of trail users to preserve riparian areas.	Preserve public access to the river.	Addressed access to the Deschutes consistent with 2010 text, but added text about education and protecting banks of river.
Addition	Encourage voluntary designation of open space and public access to the Deschutes River on adjacent private properties.	None	Addresses community concerns about loss of undeveloped areas and access to river.
Addition	Provide County perspective and support for community-based restoration projects to protect the health and vitality of the Deschutes River and its tributaries.	None	Added language that can be cited to indicate County support when third parties seek grant applications.
Revision	Preserve publicly-owned lands along the Deschutes River as designated open space.	Preserve publicly owned lands along the Deschutes River by designating them as open space.	County-owned lands are currently zoned Flood Plain, which does act as open space. County parcels are 16-12-31A, TL 099 and 16-12-30, TL 1900.
Revision	Collaborate with public, private, and nonprofit organizations on infrastructure improvements near recreation areas including formal river access points, wayfinding signage, lighting, or sanitary facilities.	Support infrastructure improvements including formal access river points, public signage, sanitary facilities and improved parking conditions.	Add references to other parties to help with any grant applications as 2020 text indicates County support. Parking is addressed in a policy further down on Tumalo State Park and park districts.



Unchanged	Support community efforts to designate the segment of the Deschutes River through Tumalo as an Oregon Scenic Waterway for its recreational values.	2020 and 2010 language are the same	None
Revision	Coordinate with community partners on the development of a trails and recreation master plan.	Support the development of a trails and recreation master plan.	2020 text recognizes entities other than County would develop a plan given the County's lack of a Parks and Rec District, but is consistent with intent of 2010 text.
Revision	Assist in outreach to Oregon State Parks Department or municipal parks and recreation districts to explore annexation of Tumalo into an existing district. Support assessment opportunities for access and parking improvements at heavily used river access points.	Consider adding Tumalo State Park to the Tumalo Rural Community boundary.	2010 language was Community Policy 1. However, its is difficult under OAR 660-022-020 and 660-004-0022(4) to expand Tumalo UUC boundaries to include Tumalo State Park. Easier process for OSPRD to extend into Tumalo or have a local parks district annex Tumalo. New text captures intent of 2010 plan and adds parking. Topic moved from 2010 Community Polices to 2020 Natural Resources, Open Space, and Recreation Policies.
Revision	Assist in outreach to Oregon State Parks Department or municipal parks and recreation districts to explore annexation of Tumalo into an existing district. Support assessment opportunities for access and parking improvements at heavily used river access points.	Explore the future expansion of Bend Metro Park and Recreation District to include the Tumalo area.	2010 language was Open Space and Recreation Policy 16. 2020 text captures intent of 2010 plan but adds the potential of other districts annexing Tumalo as Tumalo Community School is in the Redmond School District.
Addition	Explore whether the County should form a Parks and Recreation District as part of the County's Comprehensive Plan Update.	N/A	Added text based on numerous public comments input pertaining to parks and open space and desire for the County to have a Parks and Rec district or department.
Revision	Coordinate with community partners on efforts to create and maintain new local parks.	Support community efforts to create and maintain local parks.	Word choice as "coordinate" implies earlier joint efforts while being consistent with 2010 text.
Addition	Encourage preservation or improvement of groundwater quality and the conservation of groundwater supplies.	N/A	Added text based on numerous public comments input pertaining to concerns about water and drought.
Addition	Provide public educational outreach on the importance and benefits of water conservation, encouraging low water use, and drought-tolerant landscaping.	N/A	Added text based on numerous public comments input pertaining to concerns about water and drought.
Addition	Encourage Tumalo to become a fire-adapted community through the Firewise Program.	N/A	Added text based on numerous public comments input pertaining to concerns about wildfire risks and drought.
<i>RESIDENTIAL AREA GOAL</i>			
Addition	Maintain the small town character and feel of Tumalo, while accommodating the community's residential growth.	N/A	2010 plan did not have a residential goal, only policies.

<i>RESIDENTIAL AREA POLICIES</i>			
Addition	Encourage density and design features that are compatible with existing development.	N/A	Added text based on public comments on concerns about future development to blending in with existing structures.
Unchanged	Permit livestock in the residential districts subject to use limitations.	2020 and 2010 language are the same	None
Unchanged	Plan and zone for diversity of housing types and densities suited to the capacity of the land to accommodate water and sewage requirements.	2020 and 2010 language are the same	None
Deletion	N/A	Designate residential lands on the comprehensive plan map with a corresponding residential district on the zoning map.	Action needs to be applicant initiated for his/her subject property(ies).
Deletion	N/A	Designate residential land so they are proximate to the commercial area.	Action needs to be applicant initiated for his/her subject property(ies).
Deletion	N/A	Designate Residential 5 acre lands on the perimeter of the community	Action needs to be applicant initiated for his/her subject property(ies).
Deletion	N/A	Designate higher density residential lands in the bowl formed by the Deschutes River canyon	Action needs to be applicant initiated for his/her subject property(ies). Unclear if there is adequate area for septic tanks to serve higher density lots.
<i>ECONOMIC DEVELOPMENT GOAL</i>			
Addition	Retain the economic vibrancy of Tumalo's historic core and industrial area while providing economic development opportunities that are compatible with the small town rural character of the community.	N/A	2010 plan did not have an Economic Development goal, only Commercial Area Policies.
<i>ECONOMIC DEVELOPMENT POLICIES</i>			
Unchanged	Explore design standards in the commercial district so new development is compatible with the rural character of the community and reduces negative impacts on adjacent residential districts.	Encourage design standards in the commercial district so new development is compatible with the rural character of the community and reduces negative impacts on adjacent residential districts.	Changed "Encourage" to "Explore"; moved text from 2010 Commercial Area Policies to 2020 Economic Development Policies.
Addition	Explore alternatives to the solar setback standards for development within the commercial zoning district of Tumalo.	N/A	Added based on public input on challenge of applying solar setbacks to the small lots of the Laidlaw plat.
Revision	Allow residential uses and mixed residential/commercial uses, without inhibiting future commercial development opportunities in the Commercial Zoning Districts.	Allow residential and mixed residential/commercial uses, while preventing residential uses from dominating or setting development standards in the commercial district.	Doubtful 2010 text is enforceable; 2020 revision captures intent of 2010 text of having the residential and commercial zoning districts' uses remain compatible.
Unchanged	Support economic development initiatives and tourism in the Tumalo area.	Support economic development initiatives and tourism in the Tumalo area.	Moved 2010 language from Community Policies to 2020 Economic Development Policies.

Deletion	N/A	Prohibit additional lands from being designated commercial until an economic analysis review is completed.	2010 policy's vagueness would make it difficult to implement. A plan amendment/zone change to commercial in the burden of proof must provide findings for Goal 9 (Economic Development) and Goal 12 (Transportation). Essentially, address the economic reason why the use should occur on this subject property and whether there are any adverse effects on transportation. If there are, explain how they will be mitigated. In other words, PAPA/ZC process would address 2010 intent.
Revision	Allow for existing and future uses without producing adverse effects upon water resources or wastewater disposal. Coordinate with relevant agencies to ensure proposed uses meet requirements for water availability and wastewater disposal.	New uses that will not exceed the capacity of water and sewer service available to the site on the effective date of this rule (OAR 660-004-0022(3)(a)); or, if such services are not available to the site, the capacity of the site itself to provide water and absorb sewage.	2010 text only applied to industrial zoned lands; 2020 text applies to all lands within Tumalo. 2010 language appeared in Industrial Policies Section, which has been replaced in 2020 by Economic Development Policies Section.
Revision	Limit industrial activities to low-impact uses that rely on rural resources.	Allow only the following new or expanded uses in the Tumalo rural community boundary: Uses authorized under Goals 3 and 4 (farm and forest uses); expansion of use existing on the date of this rule; small-scale, low impact uses; uses that require proximity to rural resources as defined in OAR 660-004-0022(3)(a). New uses that will not exceed the capacity of water and sewer service available to the site on the effective date of OAR 660-004-0022, or if such services are not available to the site, the capacity of the site itself to provide water and absorb sewage. Newer uses more intensive than this section, provided an analysis set forth in the Comprehensive Plan demonstrates, and land use regulations, ensure that such uses are necessary to provide employment that does not exceed the total projected work force within the community and the surrounding rural area; that such uses would not rely upon a work force employed by uses within urban growth boundaries; and that the determination of the work force of the community and surrounding rural area considers the total industrial and commercial employment in the community and is coordinated with employment projections for nearby urban growth boundaries.	2010 text edited for brevity while 2020 text remains consistent with intent of 2010 language. 2010 verbiage more akin to development code than a policy document and has requirements that are of dubious legality and/or difficult to demonstrably prove.

<i>PUBLIC FACILITY GOAL</i>			
Revision	Ensure irrigation, domestic water, wastewater, and other utility systems are safe, efficient, and economical.	Ensure water and sewage treatment systems encompass the appropriate scale and cost.	Based on massive public input about concerns of cost of sewer hook-ups, added the "economical" qualifier.
<i>PUBLIC FACILITY POLICIES</i>			
Addition	Consider water and wastewater capacity when assessing development capabilities on individual lots in Tumalo.	N/A	Based on public input regarding concerns about water and staff input on septic issues.
Addition	Promote efficient water and wastewater systems in new development to manage water resources carefully.	N/A	Based on public input regarding concerns about water and staff input on septic issues.
Revision	Encourage early planning and acquisition of sites needed for public facilities.	Encourage early planning and acquisition of sites needed for public facilities (e.g. school, roads, water supply facility, parks.)	Shortened 2010 text as County as school districts, water districts, and parks districts acquire their own properties based on their own master plans.
Revision	Support replatting of lots in the area comprising the Laidlaw Plat and other lands designated commercial to create lots large enough to accommodate a DEQ approved on-site disposal system, or connection to a public sewer system if available, consistent with the findings of the Tumalo Sewer Feasibility Study (2022).	Support replatting of lots in the area comprising the Laidlaw Plat and other lands designated commercial to create lots large enough to accommodate a DEQ approved on-site disposal system.	Added reference to a public sewer and Tumalo Sewer Feasibility Study based on public input against a private sewer system.
Modification	Coordinate with local irrigation districts and the Tumalo Town Ditch to avoid adverse effects on their infrastructure and distribution systems.	Coordinate development within the Laidlaw Water District to determine if connection to its water system is required. Support the protection of the Tumalo Town Ditch easement and its distribution system.	2020 text melds and shortens 2010 Public Facility Goals #4 and #6.
Revision	Maintain efforts to ensure the Tumalo domestic water system complies with public health regulations and state and federal water quality regulations.	Support the development and management of the domestic water system for Tumalo so that cumulative development will not result in public health hazards or adverse environmental impacts that violate state or federal water quality regulations.	2020 text edited 2010 language for brevity, but remains consistent with 2010 text's intent.
Revision	If Tumalo residents initiate district formation, coordinate with residents and business owners on the creation of a public sewer district.	Coordinate with the Tumalo residents and business owners on the creation of a sewer district, if the community initiates district formation.	2020 text shortens 2010 text, makes clear that community input was for a public sewer system; 2010 text did not have that distinction.
Addition	Explore legislative approaches to preclude non-voluntary connections to private sewer systems.	N/A	Policy is in response to community input on the topic of private sewers in Tumalo.

Addition	Explore with Department of Environmental Quality(DEQ) to determine whether a property owner can record a land use provision stating a private sewer is not lawfully available under Oregon Administrative Rule (OAR) 340-040-0160 unless the land owner voluntarily consents to the connection.	N/A	Policy is in response to community input on the topic of private sewers in Tumalo.
Addition	Prohibit private sewers in Tumalo, unless the property owners of the lots in the Laidlaw plat, Deschutes River Tract, and Deschutes River Homesite Rimrock Addition form a district and vote on the issue.	N/A	Policy is in response to community input on the topic of private sewers in Tumalo.
Deletion	N/A	Determine residential minimum lot sizes by the capacity of the land to accommodate available water and wastewater facilities.	Tumalo dimensional standards are already set forth in DCC 18.67.080 for all districts and DCC 18.67.020 and 18.67.030 for residential districts. County does not have staff expertise to conduct a study to determine minimum lot sizes by carrying capacity. Additionally, technological changes and/or sewer availability will change a lot's carrying capacity.
Modification		Ensure high quality fire protection in Tumalo and the surrounding area.	2010 text modified to call out Fire Wise program and moved to Natural Resources, Open Spaces and Recreation Policies.
Deletion	N/A	Encourage early planning and acquisition of sites needed for public facilities (e.g. school, roads, water supply facility, parks.)	County does not have the authority to acquire sites for schools, water supply facilities, or parks. County only plans for County facilities such as roads, but new roads would be in the Transportation System Plan (TSP).
<b>TRANSPORTATION GOAL</b>			
Modification	Provide a safe and efficient system for all modes of transportation, including bicycle, pedestrian, and transit, to support local economic development, recreational uses, and community health.	Provide a safe and efficient system for all modes of transportation, including active modes, to support local economic development, recreational uses, and community health.	2020 text specified modes for plain English rather than use 2010 phrase of "active modes".
<b>ROAD NETWORK POLICIES</b>			
Modification	Periodically review the Transportation System Plan policies and standards for Tumalo to reflect best practices.	Review the existing Transportation System Plan policies and standards for Tumalo.	2020 text added "periodically" to indicate this would happen more than once.
Modification	Periodically review existing roadway design requirements to ensure complete streets which accommodate all modes of travel.	Review existing roadway design requirements to ensure complete streets which accommodate all modes of travel.	2020 text added "periodically" to indicate this would happen more than once.

Addition	Collaborate with the Oregon State Police and Deschutes County Sheriff's Office to address speeding within Tumalo.	N/A	2020 text added after public concerns regarding speeding on Cook Avenue, Cline Falls Highway, Tumalo Road, and US 20. Consistent with 2010 plan's intent to lower speeds.
Deletion	N/A	Coordinate with the Tumalo community and Oregon Department of Transportation to implement both short- and long-term improvements to solve transportation problems, including at the Cook Avenue and US 20 intersection.	2010 US 20 Policy no longer needed with ODOT's construction of bike/ped refuge at US 20/Bailey Hill-7th; construction of a bike/ped underpass at US 20/4th; and the construction underway for a two-lane roundabout at US 20/Cook-O.B. Riley.
Revision	Encourage ODOT to use its "Blueprint for Urban Design" for US 20 projects to enhance the roadside environment by signage, accommodating alternate modes, and roadside amenities and landscaping.	Enhance the roadside environment, through tree planting, signage, or other means.	County does not have authority to require roadside amenities within US 20 right of way; reference to "Blueprint for Urban Design," which also includes amenities and all modes, and thus 2020 text is consistent with intent of 2010 text.
<i>ROAD AND SIDEWALK POLICIES</i>			
Modification	Implement road development standards for Tumalo that are consistent with the small-scale character of the community	Implement road development standards for Tumalo that minimize pavement width and are consistent with the small-scale character of the community.	2020 text deleted 2010 phrase "minimize pavement width" but remains consistent with intent of 2010 text.
Unchanged	Utilize land development and grant funding opportunities to improve street segments identified for improvements in the Transportation System Plan.	2020 and 2010 language are the same.	None
Revision	Provide functional, cost-effective sidewalks within the commercial core while preserving the rural character of the residential areas.	Provide functional cost effective sidewalks that are consistent with the rural character of the community.	2020 text addresses need for sidewalk in the commercial core while respecting public input on not wanting sidewalks in residential areas from Wharton to the river. 2020 language is consistent with the intent of 2010 text.
Unchanged	Provide sidewalks or multiuse paths where they are needed for safety, as set forth in the Transportation System Plan.	2020 and 2010 language are the same	None
Modification	Construct sidewalks specified on community roads without curbs and gutters and allow adequate room for utilities.	Construct sidewalks specified on community roads without curbs and gutters, distant from property lines, to allow for utilities.	2020 text deletes "distant from property lines" reference, but remains consistent with intent of 2010 text.
Addition	Provide wayfinding signage and maintenance best practices on County arterials and collectors to ensure safe and accessible routes for all users.	N/A	2020 text resulted from TGM Bike/Ped/Transit update, public input, especially for bicyclists, pedestrians, rafters, and tourists.
Addition	Review Deschutes County Code (DCC) 17.48, Table B, Minimum Bikeway Design Standards and consider revising widths of multiuse path from 8 feet to 10 feet and up to 12 feet in areas with high mixed use.	N/A	2020 text resulted from TGM Bike/Ped/Transit update.

May 17, 2023



















# Tumalo Community Plan (TCP) Trails Update



*This project is partially funded by a grant from the Transportation and Growth Management (TGM) Program, a joint program of the Oregon Department of Transportation and the Oregon Department of Land Conservation and Development. This TGM grant is financed, in part by federal Moving Ahead for Progress in the 21st Century (MAP-21), local government, and State of Oregon funds.*

*The contents of this document do not necessarily reflect the views or policies of the State of Oregon.*

# Table of Contents

- Introduction..... 1
- Technical Memorandum #1..... 2
- Sisters Country Visionary Action Plan (SCVAP) Trails Outreach Update..... 27
  - Advisory Committee Meeting #1 Summary..... 28*
  - Advisory Committee Meeting #2 Summary..... 32*
  - Advisory Committee Meeting #3 Summary..... 36*
- SCVAP Trails Final Concept & Appendix..... 41*
- Tumalo Community Plan (TCP) Active Transportation Update..... 77
  - Advisory Committee Meeting #1 Summary..... 78*
  - Advisory Committee Meeting #2 Summary..... 82*
  - Advisory Committee Meeting #3 Summary..... 86*
  - Advisory Committee Meeting #4 Summary..... 89*
- Tumalo Active Community Final Concept Plan & Appendices..... 92*
- Adoption and Implementation Measures..... 112
  - Deschutes County Code Updates..... 113*
  - Deschutes County Transportation System Plan (TSP) Updates..... 117*
  - Title VI Documentation..... 122*
  - Project Information Sheets..... 124*



## MEMORANDUM

**Date:** Tuesday, May 3<sup>rd</sup>, 2022

**To:** Project Management Team

**From:** Karen Swirsky, Carrie Theus, and Katie Popp, Kittelson & Assoc.

**Subject:** TCP Advisory Committee Meeting #1 Minutes

### Attendees:

---

- Brandon Crawford, MIG [bcrawford@migcom.com](mailto:bcrawford@migcom.com)
- Carrie Theus, Kittelson & Associates [ctheus@kittelson.com](mailto:ctheus@kittelson.com)
- Chris Cheng, Oregon Department of Transportation (ODOT) [Chris.CHENG@odot.state.or.us](mailto:Chris.CHENG@odot.state.or.us)
- Devin Hearing, Oregon Department of Transportation (ODOT) [devin.hearing@odot.oregon.gov](mailto:devin.hearing@odot.oregon.gov)
- Jim Crouch, Heritage Brand, [jim@heritagebrand.com](mailto:jim@heritagebrand.com)
- Karen Swirsky, Kittelson & Associates [kswirsky@kittelson.com](mailto:kswirsky@kittelson.com)
- Katie Popp, Kittelson & Associates [kpopp@kittelson.com](mailto:kpopp@kittelson.com)
- Peter Russell, Deschutes County, [peter.russell@deschutescounty.gov](mailto:peter.russell@deschutescounty.gov)
- Rachel Zakem, Cascades East Transit (CET) [rzakem@coic.org](mailto:rzakem@coic.org)
- Susan Altman, Deschutes County Planning Commission [dcpcsusan@gmail.com](mailto:dcpcsusan@gmail.com)
- Tarik Rawlings, Deschutes County Planning [tarik.rawlings@deschutes.org](mailto:tarik.rawlings@deschutes.org)
- Theresa Conley, Oregon Department of Transportation (ODOT) [Theresa.L.CONLEY@odot.state.or.us](mailto:Theresa.L.CONLEY@odot.state.or.us)
- Tony DeBone, Deschutes County Board of County Commissioners [Tony.DeBone@deschutescounty.gov](mailto:Tony.DeBone@deschutescounty.gov)
- Tony Vicknair, Tumalo School [Tony.Vicknair@redmondschools.org](mailto:Tony.Vicknair@redmondschools.org) (Note: Sam Platt will be taking over for Tony Vicknair after he retires this month)

### Absent Committee Members:

- Andrea Breault, CET [abreault@coic.org](mailto:abreault@coic.org)
- Steve Davidson, The Bite [steven.davidson@fib.com](mailto:steven.davidson@fib.com)
- Serena Gordon, Twin Bridges Scenic Highway [serena@visitbend.com](mailto:serena@visitbend.com)
- Dave Thomson, County Bicycle & Pedestrian Advisory Committee (BPAC) [d.a.thomson@icloud.com](mailto:d.a.thomson@icloud.com)

## Notes:

---

### Project Background, Objectives, and Desired Outcomes

- Karen Swirsky discussed project boundaries, background, and objectives ([See website for slides](#))
  - The Active Transportation component is just one sub-component of the planning updates to come in the Tumalo Community Plan (TCP) and Deschutes County Transportation Systems Plan (TSP)
- Objective of this project is to identify gaps in active transportation networks in Tumalo, develop a list of needed projects in Tumalo, and provide recommendations to the TCP and TSP for implementation

### Background of Existing Plans

- Tumalo Health Impact Assessment (THIA) (2008)
- Tumalo Community Plan (TCP) update
  - Tumalo's long-term planning project, part of the county's comprehensive plan
  - Peter Russell - This project is one sub-set of the TCP and will inform the TCP for that Active Transportation segment.
    - There will be a TCP Open House on Wednesday, May 11<sup>th</sup> for the project team to collect input from community members and other stakeholders
    - Most accurate estimate of Tumalo population is 574, but future build-out population is estimated to be ~772
- Deschutes County Transportation System Plan Update
  - Anticipating that will be done late summer/ early Fall 2022
- Twin Bridges Scenic Bikeway
  - Chris Cheng - Currently the plan is to reroute the scenic bikeway through the proposed 4<sup>th</sup> Street underpass

### Planned Projects

- US 20/ Cook Ave/ OB Riley Rd roundabout
- Tumalo Multi-Use Path & Underpass at 4<sup>th</sup> Street
  - Chris Cheng: Most of the funding for this project is coming from the county
- Cline Falls Rd/ Tumalo Rd/ Cook Ave Intersection Improvement
  - Potential roundabout or realignment of intersection
  - There's a takeout spot for people on the river located here, so this area could be more pedestrian-friendly
- Other sidewalk improvements (from the draft TSP)
  - Some of them will be accomplished as part of the roundabout project in 2023
- Cascades East Transit 2040 Master Plan
  - Rachel Zakem: CET is waiting for 2 roundabouts on US-20 to determine where the Tumalo stop will go
  - Rachel Zakem will touch base with Andrea Breault this week on any additional materials to provide to the project team

## Other Needs?

- Karen Swirsky – Potential connection from the fitness track to 4<sup>th</sup> Street
  - Tony Vicknair – It's a walking track with several fitness stations. It's more popular with community members than with students at the school.
- Chris Cheng – A connection from the "downtown" Tumalo area to Tumalo State Park
  - There is a trail along the east side of the river that almost goes to the undercrossing. Connection could be used for people to get from campground to town, vice versa, without having to drive.
  - State parks used to own it the existing trail, then there was a jurisdictional transfer – Chris will send a state park contact to Karen.
- Devin Hearing - With the roundabout and undercrossing, wayfinding will be very important for bikes to continue to go to the undercrossing, not through the roundabout.
  - Peter Russell – The Tumalo trail idea [from Chris Cheng] was part of a discussion in 2009. The County got a grant from the state, but it was shut down by the State Historic Preservation Office (SHPO) because of the presence of artifacts (lithic scatter). The trail is probably feasible but may need environmental remediation which would add to the costs. Peter will look through his files and see if he can locate any documentation. Potential contact: Tumalo State Park Manager (Susan Bether)
- Peter Russell – How can the school drop-off/ pick-up be improved? Is a school traffic speed zone along Cook Avenue possible?
  - Cook Avenue is generally slow because of urban development, but Cline Falls Road has its challenges.
- Peter Russell – There are some pedestrian accommodations along the Tumalo Road bridge, but it's not comfortable at all due to fast drivers.
- Tony Vicknair – The school recently changed their school drop-off/ pick-up process, and it is working well. Parents drop-off along 2<sup>nd</sup> Street and loop around through the bus lane. Students cross the adjacent field to get to the buses.
  - There are only 4 buses, but ~170 parents in drop-off/ pick-up.
  - Bus drop-off is at 8:25am, pick-up at 3:25pm
  - The school would be enthusiastic about additional improvements to the drop-off/ pick-up process.
- Theresa Conley – Proposed a partnership between CET and school to propose a bus pull-out for student pickup and CET stop.
  - Karen Swirsky: Mini mobility hub that's multi-use if it's not too far away from the school.
  - Rachel Zakem: Not much more info on where to place the stop, just waiting to see the roundabouts.
  - Chris Cheng: Need to make sure there are walking/ biking facilities wherever the new stop is located.
- Tony Vicknair:
  - Since there will be bike and pedestrian facilities along 4<sup>th</sup> (Re: ODOT project), 4<sup>th</sup>/ Bruce/ SE side of the field would be a good location for a bus pull-out.
  - The field is very large and only used during the school day – so the school would be open to improvements along 4<sup>th</sup> Street.

- Jim Crouch - It would make a lot of sense to have a circular path that people could walk around – under the highway to 4<sup>th</sup> Street, walk under the bridge, back into the Bite, Cook Avenue, and loop around
  - There are many elderly people in Tumalo that would enjoy a walking loop – including Jim’s parents.
  - Lots of things long-term to think about as Tumalo continues to grow (commercial → industrial growth in southern part of Tumalo).
  - Karen asked Jim to provide a sketch of his proposed walking route.
- Peter Russell: SHPO and ODOT have certain requirements that could be challenging to the trail under the bridge.

## Action Items

---

Need to follow up with:

- Tony Vicknair – share contact information for Sam Platt, incoming Tumalo Community School principal
- Peter Russell – send SHPO and other related documents (Re: Tumalo trail) to Karen Swirsky
- Rachel Zakem/ Andrea Breault (CET) – send any information on CET stop in Tumalo to Karen Swirsky
- Jim Crouch - sketch a potential walking loop in Tumalo on a map

## Chat/Comment Log

---

[None]



## MEMORANDUM

**Date:** Wednesday, June 22, 2022

**To:** Project Management Team

**From:** Karen Swirsky and Katie Popp, Kittelson & Assoc.

**Subject:** TCP Advisory Committee Meeting #2 Minutes

### Attendees:

---

- Chris Cheng, Oregon Department of Transportation (ODOT) [Chris.CHENG@odot.state.or.us](mailto:Chris.CHENG@odot.state.or.us)
- Devin Hearing, Oregon Department of Transportation (ODOT) [devin.hearing@odot.oregon.gov](mailto:devin.hearing@odot.oregon.gov)
- Jim Crouch, Heritage Brand, [jim@heritagebrand.com](mailto:jim@heritagebrand.com)
- Karen Swirsky, Kittelson & Associates [kswirsky@kittelson.com](mailto:kswirsky@kittelson.com)
- Katie Popp, Kittelson & Associates [kpopp@kittelson.com](mailto:kpopp@kittelson.com)
- Peter Russell, Deschutes County, [peter.russell@deschutescounty.gov](mailto:peter.russell@deschutescounty.gov)
- Rachel Zakem, Cascades East Transit (CET) [rzakem@coic.org](mailto:rzakem@coic.org)
- Tarik Rawlings, Deschutes County Planning [tarik.rawlings@deschutes.org](mailto:tarik.rawlings@deschutes.org)
- Theresa Conley, Oregon Department of Transportation (ODOT) [Theresa.L.CONLEY@odot.state.or.us](mailto:Theresa.L.CONLEY@odot.state.or.us)
- Jeannie Fraley
- Gabriel Coler

### Absent Committee Members:

- Nicole Mardell, Deschutes County [Nicole.Mardell@deschutescounty.gov](mailto:Nicole.Mardell@deschutescounty.gov)
- William Groves, Deschutes County [William.Groves@deschutescounty.gov](mailto:William.Groves@deschutescounty.gov)
- Andrea Breault, CET [abreault@coic.org](mailto:abreault@coic.org)
- Steve Davidson, The Bite [steven.davidson@fib.com](mailto:steven.davidson@fib.com)
- Serena Gordon, Twin Bridges Scenic Highway [serena@visitbend.com](mailto:serena@visitbend.com)
- Dave Thomson, County Bicycle & Pedestrian Advisory Committee (BPAC) [d.a.thomson@icloud.com](mailto:d.a.thomson@icloud.com)
- Tony DeBone, Deschutes County Board of County Commissioners [Tony.DeBone@deschutescounty.gov](mailto:Tony.DeBone@deschutescounty.gov)
- Sam Platt, Tumalo School [samuel.platt@redmondschools.org](mailto:samuel.platt@redmondschools.org)

## Notes:

---

### StoryMap Overview

- [Tumalo Active Transportation StoryMap](#) is accepting input from the public until July 12<sup>th</sup>
- Advisory committee to spread the word about the StoryMap
- Theresa Conley – It would be helpful to have a visual/ story about what the transit stop would look like in Tumalo
  - Would look similar to Sisters and Redmond stops
  - Rachel – share some pictures of the raised stop in Sisters

### Tumalo Open House Debrief

- Peter Russell and Tarik Rawlings – Great turnout for the Tumalo Open House. Attendees very very involved and provided a lot of input. There are clearly two differing viewpoints in Tumalo: (1) Keep Tumalo the way it is and (2) Wish for a bit more growth in Tumalo.
- Karen Swirsky and Katie Popp – Three emerging themes from Tumalo Open House and Tumalo Walking Tour

### Three Emerging Themes from Public Events

- Speed Control & Safety
- Pedestrian Connectivity
- Transit

### Speed Control & Safety

- Karen and Katie went through several potential concepts to address speed control and safety, including (1) traffic signal at Cook Ave and Cline Falls Hwy, (2) Roundabout at Cook Ave and Cline Falls Hwy, (3) Raised intersection at Cook Ave and 4<sup>th</sup> St, (4) Entryway art, (5) Safety improvements such as shoulder widening on Bailey Road and Tumalo Road.
- Raised intersection
  - Peter Russell: County would be okay with a raised intersection. Another option is rumble strips.
  - Gabriel: Dan of raised intersection but wouldn't be necessary with the roundabout.
  - Jim: Agreed with Gabriel – Raised intersection would not be necessary with the roundabout.
- Roundabout
  - Jim: Supportive of a roundabout at Cline Falls Hwy/ Cook Avenue. Roundabout would improve safety for pedestrians, especially those at the river takeout heading to Tumalo downtown.

### Pedestrian Connectivity

- Karen discussed opportunities for additional sidewalk connectivity on Bruce Avenue, Cline Falls Hwy, and Tumalo Road. Possible 1-2 mile walking loop routes were presented.

### Transit

- Karen discussed opportunities for additional sidewalk connectivity on Bruce Avenue, Cline Falls Hwy, and Tumalo Road. Possible 1-2 mile walking loop routes were presented.
- Rachel Zakem – Deschutes River Woods currently has a country store stop. Rachel connected with the country store owner who didn't seem opposed, but a follow-up conversation needs to follow.



- Gabriel – Tumalo country store has a large parking lot but it can get chaotic with people coming in and out during busy times.
  - Alternative: Right before the Tumalo country store entrance on 5<sup>th</sup> Street
- Rachel – Transit stop must have sidewalks that are ADA compliant and connect to the Tumalo sidewalk network
  - Jim – Is there a need for a transit stop?
  - Rachel – A stop in Tumalo has been on CET’s radar for a few years based on input from the public that specifically request a stop in Tumalo.
  - Peter – Out of the 55 people who took the TCP survey, 29% said they wanted a transit stop in Tumalo
  - Karen – The transit vehicle is a Ford Transit van which is very small (transporting max. 7-8 people).
  - Rachel – The route would be 3 stops a day in both directions.

**Discussion**

- Jeanine would like to see a community survey on transit & roundabout at Cline Falls Hwy/ Tumalo Road
- Most seemed to like the roundabout; Devin Hearing (Deschutes County) shared concerns sight distance and the constraint of the river and Tumalo Road bridge
- Mixed reviews on raised intersection. Some were not big fans but others like; general consensus is that there isn’t a need for both the raised intersection and the roundabout
- Roundabout could be a good thing for all the folks using the river put-in, encouraging them to walk to downtown instead of driving
- Agreement that sidewalks on Bruce are important, maybe just on one side
- Most favored transit stop is on Bruce across from the Church – but the Country store could be a good interim location until sidewalks are built on Bruce
  - Country store can be chaotic at peak times
- Lots of support for a connection from Tumalo State Park to Tumalo downtown area, possibly as part of the walking loop

**Action Items**

- Advisory committee to spread the word about the [StoryMap](#)
- Send StoryMap to TCP Advisory Committee

Need to follow up with:

- Rachel Zakem – Share photos of transit stops that are representative of the future Tumalo stop

**Chat/Comment Log**

[Katie Popp] How would walking & biking fit in with these concepts?

[Theresa Conley] There are numerous driveways along that stretch that people riding bikes & driving need to navigate, I think

[Theresa Conley] Webpage for the broader ODOT project: <https://www.oregon.gov/odot/projects/pages/project-details.aspx?project=20011>

[Katie Popp] If you have more thoughts after the meeting, the StoryMap would be a great space to share



## MEMORANDUM

**Date:** Wednesday, August 31, 2022  
**To:** Project Management Team  
**From:** Karen Swirsky and Katie Popp, Kittelson & Assoc.  
**Subject:** TCP Advisory Committee Meeting #3 Minutes

### Attendees:

---

- Andrea Breault, Cascades East Transit (CET) [abreault@coic.org](mailto:abreault@coic.org)
- Chris Cheng, Oregon Department of Transportation (ODOT) [Chris.CHENG@odot.state.or.us](mailto:Chris.CHENG@odot.state.or.us)
- Dave Thomson, County Bicycle & Pedestrian Advisory Committee (BPAC) [d.a.thomson@icloud.com](mailto:d.a.thomson@icloud.com)
- Devin Hearing, Oregon Department of Transportation (ODOT) [devin.hearing@odot.oregon.gov](mailto:devin.hearing@odot.oregon.gov)
- Gabriel Coler [gabrielcoler@gmail.com](mailto:gabrielcoler@gmail.com)
- Jeannine Fraley [jeanninefraley@gmail.com](mailto:jeanninefraley@gmail.com)
- Karen Swirsky, Kittelson & Associates [kswirsky@kittelson.com](mailto:kswirsky@kittelson.com)
- Katie Popp, Kittelson & Associates [kpopp@kittelson.com](mailto:kpopp@kittelson.com)
- Peter Russell, Deschutes County, [peter.russell@deschutescounty.gov](mailto:peter.russell@deschutescounty.gov)
- Rachel Zakem, CET [rzakem@coic.org](mailto:rzakem@coic.org)
- Tarik Rawlings, Deschutes County Planning [tarik.rawlings@deschutes.org](mailto:tarik.rawlings@deschutes.org)
- Theresa Conley, Oregon Department of Transportation (ODOT) [Theresa.L.CONLEY@odot.state.or.us](mailto:Theresa.L.CONLEY@odot.state.or.us)

### Notes:

---

#### Tumalo Open House Overview; Peter Russell, Deschutes County

There were approximately 45 people at the open house. Many were confused that it was a meeting about the sewer feasibility study.

The County presented draft goals and policies for transportation, natural resources, open space, land use, environment, etc. Focusing on active transportation, the following generalizations can be made:

- Many attendees expressed opposition to Recreation policy #1. Peter feels that this is a result of an anti-tourist sentiment. In particular, people were uncomfortable with proposed policies that could make Tumalo more of a destination. Specifically, designating the river as Wild and Scenic, improving access to the river, or advertising Tumalo as the key destination on the Twin Bridges Scenic Bikeway. However, most were supportive of wider shoulders for cyclists and pedestrians.

- On the topic of transit in Tumalo, some attendees expressed opposition to a transit stop in Tumalo, mostly on social concerns but also wondering if there is a real need.
- There was support for road standards consistent with rural policy and sidewalk infill – but residents do not want sidewalks in residential areas away from the commercial core.

The County's next steps with Goals and Policies is to take all the feedback and simplify the language. The County is going to wait until the sewer feasibility study is done to reduce confusion, sometime in October. Therefore, the Active Transportation work will probably have its own online Open House in October in order to meet the grant deadlines.

## Initial Concept Plan

Karen Swirsky (Kittelton) walked through the three key topics in the initial concept plan. Discussions from the meeting are documenting as they relate to each topic.

1. Safety & Speed Improvements. *Advisory Committee support, no comments.*
2. Pedestrian Connectivity

### *Tumalo to Tumalo State Park Trail*

Chris asks if we have run the "Reconsidering trail from Tumalo to Tumalo State Park" proposal by Oregon State Parks. It's possible that ODOT swapped right-of-way with Oregon State Parks. Kittelson will check to make sure OSP is okay with the inclusion of the trail concept in the County Transportation Plan. Chris suggested Peter Wanamaker at OSP as a potential contact.

Jeannie asked for clarification on what the issue is with having a trail to Tumalo State Park. Karen explained the known archaeological sites along the trail. Jeannie expressed support for a river trail but there is a greater need on OB Riley Road for a separated path or shoulder widening.

Gabe lives near the existing user trail in that neighborhood and feels that it would be great to have an established trail that is cleaner and nicer than the existing makeshift trail which is often used by dirt bikers. A designated trailhead with parking might attract too many people. The surface could be wood chips or rolled granite, Shevlin Parks style – something that would be better than the existing ankle-deep sand. He understands that everyone wants things to stay the way they are now, but right now they're not clean and could be nicer.

### *Transit*

Jeannie noted that many people she's talked to are not positive about a stop in Tumalo.

Peter pointed out that the Bend MPO, city and county are under new pressure to provide transit under the new rules to reduce greenhouse gases.

Karen reminded the Committee that the final decision is with CET. Our scope is to identify a potential location for CET.

Andrea said that CET has been collecting customer comment forms for about 12 years and the need to stop in Tumalo has been brought up over the past decade. She will provide these comment to us.

Gabe feels that the Country Store location might induce more negativity from the public and that it might possibly be better to wait until the sidewalks along Bruce Avenue can be constructed.

Theresa asked if we know timing for constructing sidewalks on Bruce. Peter's response is that most County sidewalks are development-driven. However, in order for the stop to be accessible, the sidewalk would only have to go to the nearest intersection, such as from 7<sup>th</sup> to the Bruce stop.

Theresa suggested that examples of transit stops from Prineville and La Pine might be useful to illustrate the concept. Peter suggested that we also include a photo of the van that would be used so folks don't get the idea that it's going to be a large bus.

## Action Items

---

- Kittelson to check to make sure OSP is okay with the inclusion of the trail concept in the County Transportation Plan. Chris suggested Peter Wanamaker at OSP as a potential contact.
- CET to provide Kittelson with customer comments from the past decade that are related to a stop in Tumalo.

## Chat/Comment Log

---

[Monday 4:36 PM] CONLEY Theresa L

Do we know the timing for constructing sidewalks on Bruce?

[Monday 4:40 PM] CONLEY Theresa L

I agree and same with transit stops - what if we bring examples from Sisters, Prineville or La Pine on how the bus stops work and what the stops and stop usage looks like?



## MEMORANDUM

**Date:** Wednesday, December 14, 2022

**To:** Project Management Team

**From:** Karen Swirsky and Katie Popp, Kittelson & Assoc.

**Subject:** TCP Advisory Committee Meeting #4 Minutes

### Attendees:

---

- Dave Thomson, County Bicycle & Pedestrian Advisory Committee (BPAC) [d.a.thomson@icloud.com](mailto:d.a.thomson@icloud.com)
- Devin Hearing, Oregon Department of Transportation (ODOT) [devin.hearing@odot.oregon.gov](mailto:devin.hearing@odot.oregon.gov)
- Jeannine Fraley, Tumalo Resident [jeanninefraley@gmail.com](mailto:jeanninefraley@gmail.com)
- Karen Swirsky, Kittelson & Associates [kswirsky@kittelson.com](mailto:kswirsky@kittelson.com)
- Katie Popp, Kittelson & Associates [kpopp@kittelson.com](mailto:kpopp@kittelson.com)
- Peter Russell, Deschutes County, [peter.russell@deschutescounty.gov](mailto:peter.russell@deschutescounty.gov)
- Rachel Zakem, Cascades East Transit (CET) [rzakem@coic.org](mailto:rzakem@coic.org)
- Steve Davidson, The Bite [steven.davidson@fib.com](mailto:steven.davidson@fib.com)
- Tarik Rawlings, Deschutes County Planning [tarik.rawlings@deschutes.org](mailto:tarik.rawlings@deschutes.org)

## Notes:

### Update from County Staff (Peter Russell)

- The next steps for the Tumalo Community Plan-Active Transportation will be to present the plan to the Planning Commission as part of the overall TCP update in January or February when the Sewer Feasibility Study is completed
- The TCP recommendations will eventually be incorporated into the County Transportation System Plan (TSP)

### Update from Consultants (Kittelson)

- Karen presented a summary of comments received via the [online open house](#) held from October 5<sup>th</sup>-24<sup>th</sup>, 2022
- Karen went through a brief overview of what is included in the Final Concept Plan. There have not been any significant changes from the Draft Concept Plan to the Final Concept Plan.
- The last major step of the project is the Implementation Plan (Development Code updates)

### Questions/ Comments

- Peter Russell: Would a formal trailhead for the Tumalo to Tumalo State Park be required if that trail is developed along Riverview Ave?
- Karen Swirsky: That would be up to the County and State Park, but likely not.
- Steve Davidson: Riverview Avenue and surrounding roadways are on the border of county maintenance, so those roads are very rustic.
- Peter Russell: Yes, that's correct. These roads are local access roads, which means they're publicly maintained but the county does not spend money on them.

### Next Steps

- Implementation Plan
- Final concept plan to decision makers
- Incorporation into the Tumalo Community Plan (TCP) update
- Revisions to the Deschutes County Transportation Plan (TCP)

## Action Items

- None

## Chat/Comment Log

---

- None





## MEMORANDUM

**Date:** Wednesday, December 07, 2022

**To:** PMT and TCP Active Transportation Advisory Committee

**From:** Karen Swirsky and Katie Popp, Kittelson & Associates

**Subject:** Final Concept Plan

## INTRODUCTION

### Overview

The Tumalo Community Plan (TCP) Active Transportation Update project focuses on planning efforts for the Active Transportation component of the 2040 Tumalo Community Plan (TCP). Over the past two decades, there have been significant changes in and around Tumalo that have galvanized the transition of the Tumalo core into an active community center. These changes have warranted an update to the Active Transportation element of the Tumalo Community Plan (TCP) to support the growth of a vibrant, livable community with increased transportation choices, including to bicycling, walking, and transit.

The desired outcomes of this project include:

1. Reviewing state, regional, and local plans regarding active transportation
2. Identifying gaps in the Tumalo bicycle and sidewalk system
3. Reaching out to Tumalo residents and business owners regarding active transportation needs
4. Recommending improvements to infrastructure to support active modes of transportation within Tumalo, including potential transit access
5. Creating a list of needed active transportation projects in Tumalo
6. Providing materials and exhibits for amendments to the Tumalo Community Plan and County Transportation System to implement the suggested recommendations for active transportation (provided as separate memorandum to the County)

This Final Concept Plan addresses the outcomes of parts 1-5 of this project, which were accomplished with multiple virtual and in-person Tumalo public engagement events and discussions with the Tumalo Active Transportation Advisory Committee and Project Management Team. These outcomes are organized into three themes for active transportation that emerged throughout the public engagement process:

1. Safety and Speed Improvements
2. Pedestrian Connectivity
3. Transit

## Public Outreach

---

This section discusses public input from multiple public engagement events, including:

1. Tumalo Active Transportation Walking Tour (Wednesday, June 8<sup>th</sup>, 2022)
2. Interactive StoryMap (June 8<sup>th</sup> – July 13<sup>th</sup>, 2022)
3. Virtual open house (October 5<sup>th</sup>- 24<sup>th</sup>, 2022)

The Tumalo Community Plan Open House, walking tour, and interactive StoryMap supported the development of the Initial Concept Plan. The Initial Concept Plan was then presented in the virtual open house, which gave the public the opportunity to comment on the initial plan and provide any additional feedback to be included in the development of this Final Concept Plan.

In addition to the three public events that were specifically created to receive public input on the Tumalo Active Transportation Plan update, Deschutes County held an Open House for the entire Tumalo Community Plan Update on Wednesday, May 11<sup>th</sup>, 2022. The Open House included a table introducing the Active Transportation plan update.

### Public Event #1: Tumalo Active Transportation Walking Tour

On Wednesday, June 8<sup>th</sup> from 2-4pm, Kittelson hosted a Tumalo Active Transportation Walking Tour for community members and project stakeholders to share their input on walking, biking, and transit infrastructure in the community. The tour had at least 10-15 participants at a time, with some people joining the tour later and others dropping off before it was complete. The tour started at the fire station and traveled west on 4<sup>th</sup> Street, then north to the Fit trail Park and Tumalo Community School, east on 2<sup>nd</sup> Street to Cline Falls Highway and Tumalo Road intersection, then south on Cook Avenue to end at The Bite. Due to time constraints, the tour did not walk along Bruce Avenue, but sidewalks and a CET stop on Bruce were discussed and input is summarized in this memorandum. A map of the walking tour is shown in Figure 1.

While passing by the Tumalo Community School, the tour group observed the afternoon pick-up process. A teacher at the school emphasized that the current process, which has vehicle pick-up at the front of the school and bus pick-up behind the school field on 4<sup>th</sup> Street, is the most pick-up/ drop-off strategy for student safety and general efficiency.

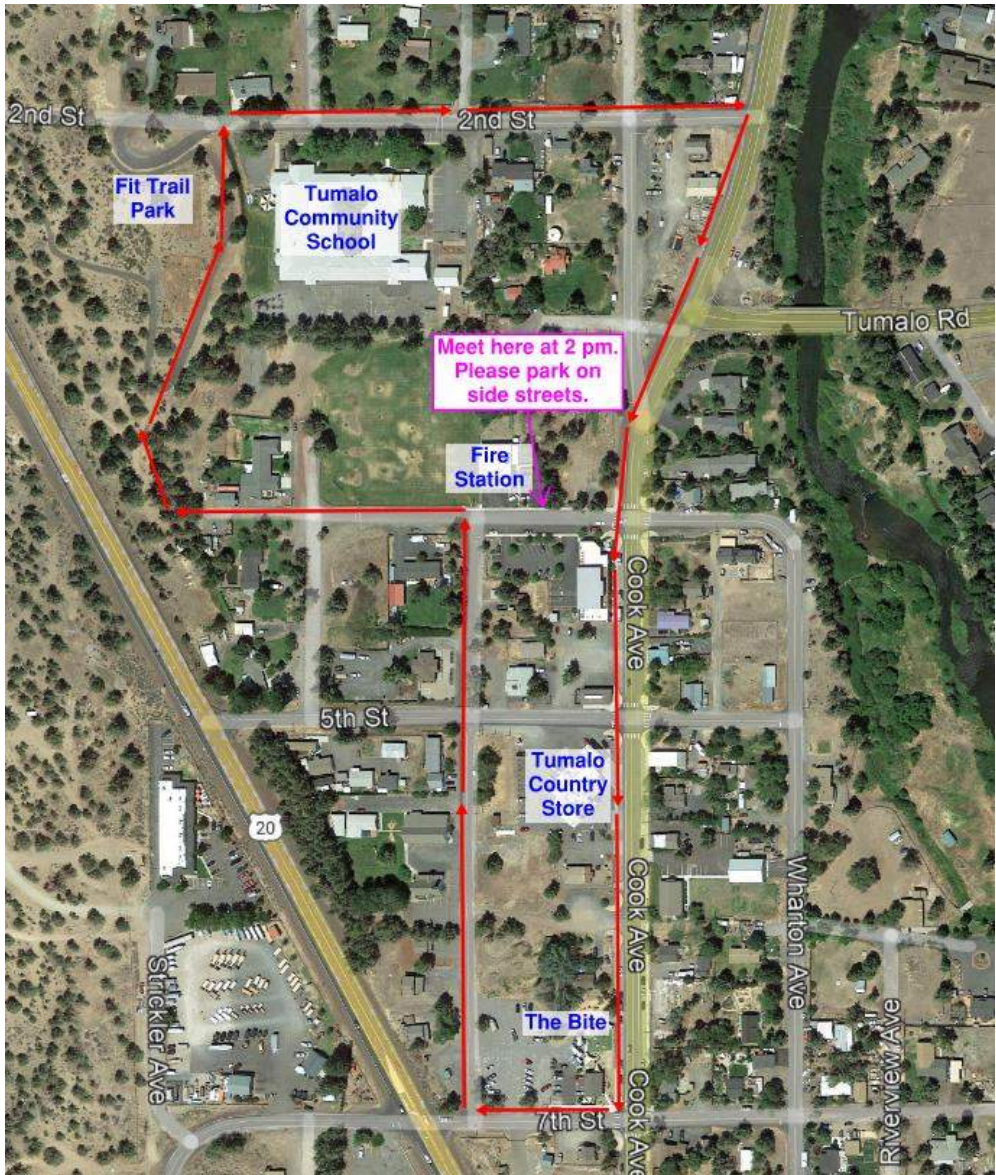


Figure 1: Tumalo Active Transportation Walking Tour Map.

## Public Event #2: Online Interactive StoryMap

The [online StoryMap](#) was open for comments from June 8<sup>th</sup> to July 13<sup>th</sup>, 2022. The interactive StoryMap allowed users to provide comments related to active transportation in Tumalo by clicking a location on a map within the Tumalo boundary. Users could also reply to and "Like" other comments in support. Overall, 22 comments and replies were collected. The responses are provided in Appendix A.

## Public Event #3: Virtual Open House

The Tumalo Community Plan (TCP) Active Transportation Update [virtual open house](#) was open from October 5-24, 2022. Visitors were introduced to the three leading topics included in the Initial Draft Concept, including (1) Safety and Speed Improvements; (2) Pedestrian Connectivity; and (3) Transit in Tumalo. The open house received 23 total comments provided in Appendix B.

# SAFETY AND SPEED IMPROVEMENTS

## Cline Falls Hwy/ Tumalo Road Intersection

Over the past decade, Tumalo has seen significant growth in its core business area along Cook Avenue. In conjunction with its role as the community’s core business area, Cook Avenue north of 4<sup>th</sup> Street provides a connection to the rural area outside of the Tumalo core via Cline Falls Highway, a rural two-lane roadway with a posted speed of 45mph north of Tumalo Road. Based on input from public events and the online StoryMap tool, many residents are concerned about high vehicle speeds traveling southbound on Cline Falls Highway and eastbound on Tumalo Road.

On Tumalo Road, the 45 mph posted speed limit sign is located before a curve that limits sight distance for all modes of transportation as vehicles are increasing their speed heading eastbound. The Cline Falls Highway and Tumalo Road intersection is especially challenging for pedestrians and cyclists because of high speeds and lack of dedicated infrastructure to separate active modes of transportation from vehicular travel. Additionally, a popular river takeout located on the northeast corner of the intersection prompts pedestrian crossings through the intersection to access the Tumalo core area from the takeout. Improved active transportation infrastructure at the intersection would provide a vital connection to neighborhoods east of the river and the Tumalo Community School.

Residents suggest (1) implementing variable speed warning signs and/or (2) relocating existing posted speed limit signs so that vehicles are not prompted to increase their speeds from 25 mph to 45 mph so close to the intersection, as they do today. Based on discussions with the County, relocating existing posted speed limit signs is not a feasible option due to Speed Zone Orders adopted by the Oregon Department of Transportation (ODOT). However, due to the challenges of the intersection as a transition from a business area to more rural land use patterns, a more significant treatment at the intersection is warranted to enhance the safety of pedestrians and cyclists as well.

Several intersection alternatives for the Cline Falls Highway and Tumalo Road intersection were considered, including a traffic signal, all-way stop, turn lanes, and a roundabout. Based on discussions with the public, project management team, and Active Transportation Advisory Committee, a roundabout is the preferred alternative due to the safety benefits for both motorized and non-motorized transportation users. In further support of the roundabout alternative, a preliminary analysis of projected safety benefits of each potential intersection alternative was conducted using ODOT’s Crash Reduction Factors (CRFs) from the All Roads Transportation Safety Program<sup>1</sup>. The CRF estimates the projected percent decrease in crashes that would result from converting the existing intersection (side street stop control intersection in a rural area) to a given alternative. For example, a CRF of 82% for a roundabout alternative indicates that converting an intersection that has stop control on the side street (such as the Cline Falls Highway/ Tumalo Road intersection) to a roundabout is expected to reduce the number of crashes at the intersection by 82%. CRFs are often used to

---

<sup>1</sup> Oregon Department of Transportation (ODOT) (2020). *HSIP Countermeasures and Crash Reduction Factors*. <<https://www.oregon.gov/odot/Engineering/ARTS/CRF-Appendix.pdf>>.

quantify safety benefits of an intersection improvement alternative. A summary of CRFs for each of the initial alternatives considered is shown in **Table 1**.

**Table 1. Crash Reduction Factors (CRFs) of Intersection Alternatives**

Alternative	Crash Reduction Factor
All Way Stop Control	48% for all crashes, all severities
Traffic Signal	77% for angle crashes, -58% for rear end crashes <sup>1</sup>
Turn Lanes	37% <sup>2</sup> for all crashes, all severities
Roundabout	82% for all crashes, all severities

<sup>1</sup> A traffic signal would reduce the number of angle crashes by 77% but increase the number of rear-end crashes by 58%.

<sup>2</sup> Combined CRF of installing a right turn lane on a single major road approach and a left turn lane on a single major road approach (Cline Falls Hwy). The CRF was calculated using guidance from FHWA and the CMF Clearinghouse.

Kittelson & Associates, Inc. is working with Deschutes County to develop a preliminary roundabout concept at Cline Falls Hwy and Tumalo Road. In the short term, variable speed warning signs or a raised intersection at Cook Avenue and 4<sup>th</sup> Street may be appropriate interim traffic calming treatments that could be implemented before a more significant treatment is developed.

## Enhanced Entry Statement

The Cline Falls Highway and Tumalo Road intersection serves as the northern entry point to the Tumalo business area, which has become a popular spot for locals and visitors to shop and eat over the past few years. In addition to speed control and safety measures at the intersection, a more significant entry statement could signify to vehicles entering from the surrounding rural area that the environment is shifting to a downtown/business area, thus prompting lower speeds. Examples of significant entry statements for nearby communities include roundabout art at Prineville/Tom McCall Road and an archway in Redmond, shown in Figure 2. A similar treatment for Tumalo is suggested as a possible treatment to signify the change in environment for all modes of transportation and provide an opportunity for a public art display that embodies the unique character of the Tumalo community.



Figure 2. Examples of entry statements signifying a change of setting.

## Shoulder Widening

The project team received several comments in support of widening the shoulders along Cline Falls Highway and Tumalo Road to enhance safety for bicyclists. Both roadways are popular routes for bicyclists and Tumalo Road is included as a segment in the most current map of the Twin Bridges Scenic Bikeway. Widening the shoulders could reduce vehicle-bicycle conflict on these roadways, which are both rural two-lane highways with vehicles traveling at higher speeds.

## Safety and Speed Improvement Recommendations

The Safety and Speed Improvements concept is comprised of the following recommendations shown in Figure 3:

- Intersection improvement at Cline Falls Highway and Tumalo Road (roundabout concept)
- Implement a raised intersection at Cook Avenue and 4<sup>th</sup> Street as an interim treatment before a more significant improvement is developed
- Implement variable speed warning signs on Cline Falls Highway and Tumalo Road
- Enhanced Entry statement at Cline Falls Hwy/ Tumalo Road as a suggestion to signify a change of setting
- Widen shoulders on Tumalo Road from the Deschutes River bridge to Swalley Road (approx. 1 mile)
- Widen shoulders on Cline Falls Highway from Tumalo Road to Highland Drive

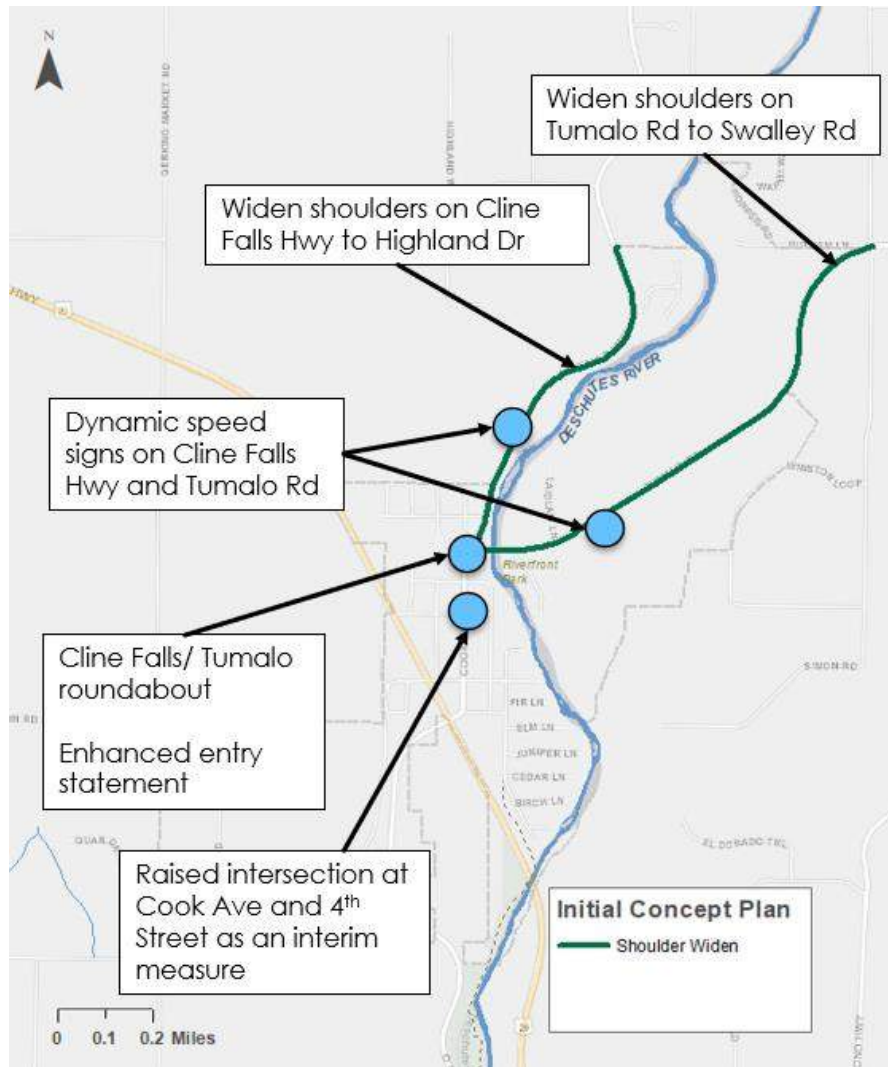


Figure 3. Safety and Speed Improvement Concept #2: Pedestrian Connectivity

## PEDESTRIAN CONNECTIVITY

Existing pedestrian infrastructure in Tumalo is primarily located on Cook Avenue from 7<sup>th</sup> Street to 4<sup>th</sup> Street with some east-west extensions off Cook Avenue on 4<sup>th</sup> Street towards the school and on 7<sup>th</sup> Street along The Bite property. Currently, pedestrian infrastructure consists mainly of curbed sidewalks. The planned ODOT US 20/4<sup>th</sup> Street bike/ped underpass offers an opportunity to develop a more complete pedestrian network that targets better access to the Tumalo Community School and accommodates continued growth of businesses in downtown Tumalo that are starting to expand outside of Cook Avenue. The following gaps are identified as priorities for the improvement of the pedestrian infrastructure in Tumalo.

## Bruce Avenue

---

Bruce Avenue is a north-south roadway that parallels Cook Avenue to the west. Several businesses, Tumalo Community Church, and the west boundary of parking lots for The Bite, Tumalo Country Store, and a commercial area at 5<sup>th</sup> Street/Cook are located along Bruce Avenue between 7<sup>th</sup> Street and 4<sup>th</sup> Street. As business continues to grow in the Tumalo core area and abutting properties are zoned commercial, Bruce Avenue will likely transition to a more developed business corridor like Cook Avenue. Consequently, incorporating Bruce Avenue into the pedestrian infrastructure network will accommodate growing foot traffic throughout the core area. Bruce Avenue connects to the back side of Tumalo Community School at 4<sup>th</sup> Street and would provide an additional connection to the planned 4<sup>th</sup> Street underpass. Bruce Avenue is also a viable candidate for a CET stop in Tumalo, as described in the *Transit* section.

## 4<sup>th</sup> Street to Fitness Trail

---

A connection between the planned US 20/4<sup>th</sup> Street underpass and the Fit Trail Park on the west side of the school is a feasible addition to the active transportation network in Tumalo (Figure 4). The connection would require paving approximately 200 feet of a dirt path that already connects the Fit Trail Park to 4<sup>th</sup> Street, which is a welcomed connection for residents that frequent the Fit Trail.





Figure 4: Fit Trail Park connection to planned 4<sup>th</sup> Street underpass

## Wharton Avenue

Based on input from public events and the online StoryMap, Wharton Avenue is identified as a roadway in need of sidewalks to accommodate future development in Tumalo. Wharton Avenue is a north-south roadway that parallels Cook Avenue to the east. Today, Wharton Avenue is primarily residential. However, Heritage Brand is constructing a 10,000-square-foot facility on the corner of 7<sup>th</sup> Street and Wharton Avenue that could bring more foot traffic to Wharton Avenue. Additionally, a river access point is located on Wharton Avenue where it transitions to 4<sup>th</sup> Street. Like Bruce Avenue, Wharton Avenue will likely see additional development as properties on the west side are zoned commercial and an increased need for pedestrian infrastructure as Tumalo’s main business area continues to grow and expand past Cook Avenue.

## Tumalo Walking Loop

There is support from local residents for a formalized 1-2 mile walking loop through Tumalo that would promote physical fitness for residents of all ages. With the construction of the planned 4<sup>th</sup> Street underpass and US20/Cook roundabout, there are opportunities to incorporate the new infrastructure into a walking loop identified by wayfinding signage. The walking loops would be established using existing infrastructure in addition to new infrastructure that will be developed with the 4<sup>th</sup> Street Underpass and US20/ Cook Avenue roundabout. Residents also identified the frequent use of makeshift dirt trails to access Tumalo State Park at the southern end of the Tumalo unincorporated community boundary. Based on discussions within the

Advisory Committee, some suggested walking loop routes are identified in Figure 5. Ultimately, any formalized walking route loops will be decided by the community.



Figure 5: Walking loop routes

## Tumalo to Tumalo State Park Trail

A formalized trail connection to Tumalo State Park from the Tumalo core area has been a recurring topic of discussion in the community over the past two decades. A few years ago, the County received a grant from the state to further explore the possible connection. However, the idea was shut down by the State Historic Preservation Office (SHPO) due to the presence of artifacts. The forthcoming update to the Tumalo Community Plan has revived discussions about the potential trail connection. The proposed trail connection would likely utilize existing makeshift trails along Riverview Avenue in southwest Tumalo that connect to State Park via an undercrossing at US20. Based on input through several public outreach events, support for the proposed trail is divided amongst community members. Those against the proposed trail expressed concerns about a trailhead located in the residential area along Riverview Avenue. Trails that pass through County-administered land or private property in unincorporated areas must go through County land use review and approval processes. Trails that pass through Tumalo State Park will need to be approved by

Oregon State Parks. Trails that pass through or along ODOT rights-of-way will need to be approved by the ODOT.

Based on the recommendation of the Advisory Committee, a Tumalo to Tumalo State Park Trail connection is included in this Final Concept Plan. However, due to the mixed support from the community, future planning efforts including additional community engagement would be necessary prior to identifying a final alignment and initiating local, state, or federal approvals.

## Pedestrian Connectivity Recommendations

---

The Safety and Speed Improvements concept is comprised of the following recommendations shown in Figure 6:

- Sidewalk on both sides of Bruce Avenue. For project prioritization purposes, sidewalk should be prioritized on the east side if funds are limited.
- Walkway/ multi-use path on west side of Wharton Avenue.
- Continuation of pedestrian facilities north of 4<sup>th</sup> Street to 2<sup>nd</sup> Street on both sides (to tie into selected improvement at Cline Falls Hwy/ Tumalo Road).
- Wayfinding for a walking loop in Tumalo.
- Consider opportunities to develop a trail from Tumalo to Tumalo State Park (though much of the trail would be outside of the Tumalo unincorporated community boundaries)

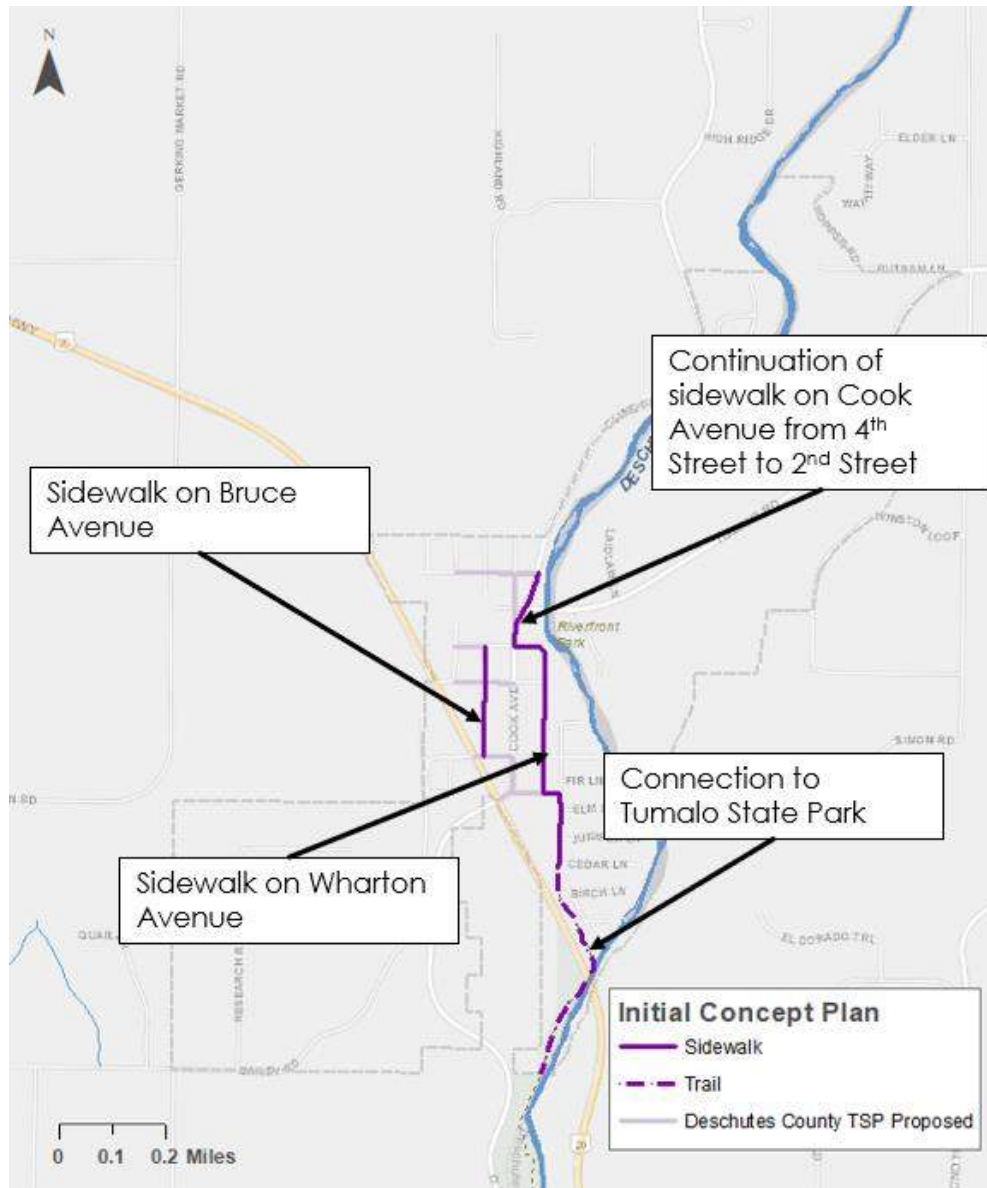


Figure 6. Pedestrian Connectivity Concepts

## TRANSIT

CET has identified a stop in Tumalo as a new addition to Route 29 as part of the 2040 Master Plan. At the public event, several residents expressed concerns about locating a stop near the school. With those concerns in mind, the following locations are under initial consideration. Ultimately, the location will be decided by CET. The CET vehicle for this new connection in Tumalo would be a Ford Transit van, which has a maximum capacity of 8 people. Additionally, the CET stop must be ADA accessible and connect to a sidewalk network.

### Bruce Avenue Stop

---

The east side of Bruce Avenue between 7<sup>th</sup> Street and the Tumalo Community Church has been identified as a viable location for a CET stop due to its proximity to downtown Tumalo. This stop would be located behind the parking lot for The Bite which is a primarily commercial area of town. A stop on Bruce Avenue would necessitate the construction of sidewalks on the east side of the street before the development of the stop.

### Country Store (5<sup>th</sup> Street) Stop

---

The Tumalo Country Store is identified as a potential interim location for a CET stop before pedestrian facilities on Bruce Avenue are improved. CET has partnered with Country Stores in the past and is in favor of locating a stop where drivers can access a restroom and food.

### Transit Recommendations

---

Both the Bruce Avenue and 5<sup>th</sup> Street stops are viable options for a CET stop in Tumalo, as shown in Figure 7. Ultimately, the location of the stop will be decided by CET.



Figure 7. Transit stop recommended locations



## APPENDIX A

### StoryMap Comments Summary

A summary of the StoryMap comments is shown in Table 2.

Table 2. StoryMap comments summary.

#	Comment	Likes
1	Add sidewalk to Bruce Avenue between 4 <sup>th</sup> and ultimately 7th	1
2	Is it possible to improve ped facilities on the Tumalo Bridge to get across the Deschutes River? Add a ped walkway to the outside of the existing structure on either both sides or one side?	2
3	As traffic increases on Cook, should Wharton receive more bike/ped amenities as a parallel alternate route to Cook?  <i>Reply: There absolutely needs to be additional alternatives to get through town. Traffic on Cook has increased tremendously and bikes aren't safe on the road. (3 likes)</i>	1
4	Where practical, widen shoulders on Tumalo Road between Putnam/Tumalo Road and Cline Falls Hwy/Tumalo Road intersections  <i>Reply: Immediately after the bridge on Tumalo road there are about 3 main neighborhoods where people use Tumalo road to walk towards town. There isn't a great shoulder for pedestrians or bikes so the walk is pretty dangerous. Would be great to have wider shoulders and more accessible walking conditions (i.e. flatter). (1 like)</i>	1
5	Any safety improvements to this busy intersection would be great. RAB is the best option in my opinion.  <i>Reply: need electronic speed control..by the time they reach this intersection they are speeding up Cline falls road or Tumalo road, I believe this road is not designed for this much traffic...We need a bi-pass away from downtown Tumalo</i>	3  3
6	If Bruce Rd is to house a future transit stop, it will be critical to ensure that the stop is connected to the sidewalk network. It may be a good idea to include sidewalk improvements to Bruce in your plan.	1
7	This stretch of Cline Falls is very close to the river and it would be good to see active measures taken to prevent road pollution from entering the waterway. Aside from exhaust, oil, grease, and trash, tire fragments have been shown to make their way to the water in high concentrations.  Ideally the road could be moved away from the river.  <i>Reply: The noise pollution on this road as people speed up the hill is also out of control. Would be ideal to have stronger speed enforcement around this corner. It's also very dangerous for the wildlife crossing here - which happens very often - because people are just flooring it as soon as they get out of town.</i>	2  2
8	The speed limit jumps from 25 to 40 here when heading east. Cars are approaching the bridge from the west at 40 mph. There are often pedestrians on the bridge, or on the northwest side of the river with little protection. There is a house east of the sign that is only 30 feet from the road and on the curve. There are several other houses that are not setback too far from the road further to the east. I think it would be good to move the 40mph speed limit further east.	2

	<i>Reply: I agree with this.</i>	1
13	Great idea to have a bus stop in Tumalo for Route 29. Please consider a small covered and safe bus stop station either at 4th St near the pedestrian underpass and/or at the Cline Falls/Hwy20 round about.  <i>Reply: The risks associated with homeless people getting access to our town far outweigh the benefits for the couple of people in Tumalo who would make use of public transport. It is essential that the consultant run a cost versus benefit analysis on any such investments.</i>	1  1
14	Large commercial building (Heritage Brand) is nearing completion on corner of 7th and Wharton. It appears there will be several driveway entries for this business. As a result, traffic will increase on 7th Street, on Wharton Ave., and on Cook Avenue. Please consider sidewalk needs on 7th and on Wharton.	1
15	I see only one proposed pedestrian path (providing sidewalks) that will cross Cook Ave. And that is the one marked at 8th Street. 8th Street is only a few car lengths off of Hwy. 20; and with the Hwy 20 round-about, I question crossing safety. Especially for children who walk or ride bikes to school. Cook Ave. (at any intersection) can be difficult to cross for pedestrians and bikers.	1
17	Please complete continuous sidewalk son Cook Ave. from Tumalo Road to the OB Riley Rd/HWY 20 round about.	0
18	Please add bike lanes to Tumalo Road between Cline Falls and the community boundary.	0
19	Public trail access along the Deschutes, connecting to the street ends (Pine, Fir, etc.) would enhance the rural village feel of Tumalo. Please add trail access to the west side of the river within the community boundary.	0
21	County nor consultant seem to understand that most of the 'bicycling' actually consists of amateur cyclists using the farm roads outside of Tumalo unincorporated. It's not people on eBikes getting their lunch at a food cart. The real issue to be addressed is coexistence between cyclist and farm equipment on rural roads	0
22	Highly congested with parked vehicles from river rafters. Congestion causes blind spots (ie: difficult crossing and pull-out) for vehicles, bicycles, and cars.	0





## APPENDIX B

### Open House Comments Summary

The Tumalo Community Plan (TCP) Active Transportation Update [virtual open house](#) was open from October 5-24, 2022. Visitors were introduced to the three leading topics included in the draft concept, including (1) Safety and Speed Improvements; (2) Pedestrian Connectivity; and (3) Transit in Tumalo. The open house received 23 total comments shown in Table 3.

Table 3. Virtual Open House Comments

No.	Response	Comments
1	I don't like this	A roundabout at tumalo road is not needed, a 3 way stop would be more than adequate, and utilize the tax payers money much better. A raised intersection isn't necessary either the stop at tumalo road would take care of this as well. Your roundabout plan would cause all traffic to go through the front lawn of two homes, are they ok with this? Pretty sure no one asked them.
2	I like this	I would like to see the speed limit reduced to 25 MPH for the first 2 tenths of a mile past the river while heading east on Tumalo road. There is housing density and activity for almost a quarter of a mile there. It would be even better if there was some law enforcement to support the speed limit already in place. Currently 40 MPH
3	I don't like this	I dont agree that a roundabout is the best solution for the TumaloRd/Cline Falls intersection. Most roundabouts in Bend are already obsolete by the time they are built and put into use. Also, they are expensive and will encroach on residential properties. A roundabout should be a LAST resort -- after all other means of controlling traffic there have been exhausted. How about a 3 way stop, or traffic light? Other options deserve to be explored!
4	I like this	I live off Swalley so having a roundabout at Tumalo and Cline falls Highway would be a great benefit as cars come fast from both directions and the back-up wait is getting worse.  With all the bicyclists would be nice to have shoulders on Swalley as well.  Slowing cars down on Cook through downtown with better crosswalks is an excellent idea.  With Knife River and other similar rock companies in area the amount of rocks thrown from these trucks onto many of the roads in Tumalo is unbelievable. The new roundabouts are only going to make this worse. As a daily on-road motorcyclist I have almost gone down three times from hitting a patch of lose

		gravel. Please do something about better street cleaning and start charging these companies a surcharge for this or have them coverer their loads. My calls about this issue fall on deaf ears.
5	I like this	<p>I like the idea of the raised intersection; the ones I've encountered seem effective, and it's a minimal modification.</p> <p>I'm skeptical of an enhanced entry - I feel like that's been tried with the granite Tumalo sign at the Cook/Tumalo Ave. intersection, and at least 2 people have run right into it! I'd rather not see a grand entry like the Prineville or Redmond examples - that seems too grand for Tumalo. There are so many changes coming - it'd be nice to retain Tumalo's humble character.</p> <p>I used to be an avid cyclist in Portland, and to this day I'd feel more comfortable riding in traffic there than I do on the scenic bikeway in Tumalo. Traffic simply moves too fast all along Cline Falls Hwy, much further than a wide shoulder is proposed. I don't think the shoulder will do anything to slow speeds or cure the aggressive drivers who seem to not want to share the road. Having a few extra feet of space would not make me feel any safer, or markedly change my reluctance to ride. I live on the bikeway and find this really unfortunate.</p>
6	-	<p>I have lived in Tumalo on 7th Street for 36 years. Mule deer have migrated through the proposed new roundabout area</p> <p>forever. I think a couple deer crossing signs are needed in this area if no signs are in the area yet when the new roundabout goes in this December.</p> <p>Regards, Jim Mooers</p> <p>[Submitted via email – not part of open house comments]</p>
<b>Pedestrian Connectivity Concept Map</b>		
6	I like this	It's ok, I didn't gather really one way or another from the residents I spoke with on this. It was mixed comments.
7	I don't like this	<p>I agree sidewalks need to be improved in town.</p> <p>But the trail connection to the State park is asinine! Have you considered the effects of this "walkway" to the residents on 4th street and the school? including: light pollution, invitation to homeless to sleep in the tunnel, and a general increase in foot traffic in front of all those folk's homes and the school? Seems like the trail could be moved close to the river -- Adjacent to the Antique store just South of Cook Ave.</p>
8	I like this	Isn't there a pedestrian path planed for under hwy 20? If not, that was an excellent idea.

9	I don't like this	I oppose the pedestrian trail running the length of Riverview Avenue -- which in the map is the north-south (vertical) dotted line between Fir and Birch Lanes. Riverview Avenue is a private, unimproved road that homeowners and nearby property owners already have to deal with wear-and-tear issues such as dust and pothole problems. Again, Riverview is NOT a public road -- how can a trail be established on private property?
10	I like this	Support this!
11	-	Regarding a trail connection to Tumalo State Park, several years ago a similar plan was overwhelmingly rejected by the neighborhoods on streets connected to Riverview Drive. That plan included a trailhead West of the river and north of the Hwy 20 bridge. I personally canvassed the neighborhood collecting signatures against. These were provided to Anthony Raguine and, consequently, the plan was abandoned. Re-writing the trail connection effort will still bring folks driving to the pathway and parking in our neighborhood. Be SURE to include road improvements, parking, security and sanitary considerations with any trail connection thoughts, and then still plan for an overwhelming push-back from the neighborhood.
12	-	<p>The trail connection should be a real trail. Not too sure about the sidewalk on Wharton Avenue..... At least enough room to walk on.</p> <p>Another issue I have that I want this to get to the right people.....Tumalo is a small community and we need to route all the very large trucks..(like knife river trucks) bypass this town. They all need to be on the big hwys not driving down our small town pass small houses.</p> <p>I come from the Portland area and I have not seen anything like it..... Thx Larry</p>
13	I like this	Connectivity to Tumalo State Park will be nice.
14	I like this	Looks great. Downtown Tumalo needs a park as this community is underserved for parks in Bend. Having these pedestrian trails connect to a park in downtown would be ideal.
15	I like this	<p>I am all for accessibility and sidewalks. I would love to see sidewalks continued up Cline Falls so that folks who live less than a mile from Tumalo didn't have to drive to the Bite!</p> <p>I am concerned that a walkway on Wharton, past a popular river access point at 4th and Wharton, and then again by the Hwy 20 bridge might bring undesirable impacts on the riverbank and the river itself. The informal parking area at Cook Ave. and Tumalo Ave. is overused, dangerous for drivers and pedestrians, and is a disaster for the riverbank and the riparian area alongside. Is there any work being done to mitigate the impacts of creating access to a part of the river that will see an increase of traffic?</p>

		I would also love to be able to walk to Tumalo State Park from its namesake town, but my above concerns apply here, as well.
<b>Transit Concept</b>		
16	I don't like this	From the people who I have talked to about this, only 3 out of 79 thought this was a good idea. That is only 3.7%. This shows me that a transit stop is not necessary for Tumalo. This would cause a much larger carbon footprint than we currently have.
17	I don't like this	I STRONGLY oppose a transit stop in Tumalo. And I am not sure why Tumalo would need one -- it is not really a "destination" for shopping or services. You are inviting trouble into this tiny rural hamlet. Mass transit will bring homeless, drugs, and crime.  My experiences in Bend with Hawthorne station have been horrific! I was assaulted by a homeless man while walking my young children to Juniper, and refuse to shop in that area due to it being unsafe, presence of drug paraphernalia, theft, violence, and loitering of unsavory characters.  This is NOT wanted or needed in Tumalo!
18	I don't like this	I don't see the need for this.
19	I like this	I think it's important to have transit in Tumalo, either location seems fine -- Country Store and gas station is currently super congested as it is, so maybe Bruce?
20	I don't like this	No transit bus stops in Tumalo. I do not believe these are necessary and will only invite homeless people to Tumalo.
21	I like this	Either location. Needs to include parking.
22	I like this	I'm happy to have transit at all! Seems like the Bruce Ave. option might be better in terms of not disrupting the flow of traffic within Tumalo - there's less traffic on Bruce Ave, while the 5th St/Cook Ave intersection sees quite a bit of turning traffic, both for the gas station and due to 5th ave being the safer street from which to make a left turn onto Hwy 20. I know the left turn issue will be resolved by a roundabout, but it seems like the gas station traffic might be snarled by having a close bus stop.
23	I don't like this	Tumalo doesn't really have a draw for Transit. Those that live here have cars to go to town for groceries and socialization. A bus transit stop would bring transient persons into town. We are so small we don't have the infrastructure to care for those individuals. We also don't need transients hanging around town with our children at the school so close. Nor do we need to foster any ideas of a houseless camp in Tumalo on any private or public land.

# TCP Active Transportation Update/ SCVAP Trails Outreach Update - Adoption



## MEMORANDUM

**Date:** Tuesday, January 31, 2023

**To:** Peter Russell, Nicole Mardell, and Tarik Rawlins, Deschutes County  
Devin Hearing, ODOT

**From:** Karen Swirsky and Katie Popp, Kittelson and Associates, Inc.  
Brandon Crawford and Matt Hastie, MIG | APG

**Subject:** TCP Active Transportation Update and SCVAP Trails Expansion Outreach – Implementation Measures (Deschutes County Code)

---

## INTRODUCTION

This memo provides proposed amendments to the Deschutes County Code (DCC) to support implementation of the Tumalo Community Plan (TCP) Active Transportation Update and the Sisters Country Vision Action Plan (SCVAP) Trails Expansion project.

The proposed amendments are a result of a thorough review of Oregon county and state codes, design standards, and active transportation guidance that aligns with the context of Tumalo and Sisters Country. The reviewed documents include:

- Oregon Bicycle and Pedestrian Design Guide (2011)
- AASHTO Guide for Development of Bicycle Facilities, 4<sup>th</sup> Edition (2012)
- Hood River County Bicycle Plan (2010)
- Clackamas County Active Transportation Plan (2015)
- Lane County Bicycle Master Plan (2022)
- Washington County Road Design and Construction Standards (2011)
- Washington County Bicycle Facility Design Toolkit (2012)

---

## Proposed Amendments to the Deschutes County Code (DCC)

The County may consider amendments to the Minimum Road Design Standards (DCC 17.48 Table A) and the Minimum Bikeway Design Standards (DCC 17.48 Table) to support implementation of the TCP Active Transportation Update and Sisters Country Vision Action Plan (SCVAP) Trails Expansion project. The proposed amendments as a result of the outcomes of both projects are discussed in this section.

## Tumalo Community Plan (TCP) Active Transportation Update

The proposed amendments associated with the outcomes of the TCP Active Transportation Update support the ongoing effort to develop a safe, livable, and connected active transportation network in the growing Tumalo unincorporated community. Based on outcomes from the project and a review of state and county design guidance, amendments to both Table A (Minimum Road Design Standards) and Table B (Minimum Bikeway Design Standards) are proposed. Proposed deletions are shown in ~~strikeout~~ and additions are shown in underline.

Proposed amendments for the Tumalo section of DCC 17.48 Table A:

1. Update the Tumalo Incorporated Community section of DCC 17.48 Table A to include guidance specific to arterials. Based on the Deschutes County “Roads Under Deschutes County Jurisdiction” document updated in September 2022, both Cook Avenue from Cline Falls Highway to US20 and Cline Falls Highway from the northern Tumalo – UGB boundary to Tumalo Road are designated urban arterials.
2. Update the minimum paved width of Path/ Trail to 10 feet for paved paths. Add language that defines the minimum separation from roadways for both trails and paths as 2 feet. Remove language about an 8’ minimum paved path from footnote (23), shown with the ~~strikeout~~ text below.
  - a. ~~(23) The minimum width is 8 ft. However, 8 ft. wide multiuse paths are not recommended in most situations because they may become over crowded. They should only be constructed as short connectors, or where long term usage is expected to be low, and with proper horizontal and vertical alignment to assure good sight distances.~~ 10 ft is the standard width for a two-way multi-use path but they should be 12 ft wide in areas with high mixed-use. Optimum use should be based on the relative use by cyclists and pedestrians. High use by skaters may also require greater width.

The proposed DCC 17.48 Table B (Minimum Bikeway Standards) amendments support the implementation of both the TCP Active Transportation Plan Update and the SCVAP Trails Expansion Outreach project and are shown in **17.48 Table** (after the “SCVAP Trails Expansion Outreach” section).

## SCVAP Trails Expansion Outreach

The County should consider updates to the County Bikeway Design Standards (DCC 17.48 Table B Minimum Bikeway Design Standards) to support implementation of proposed trails in Sisters Country and the rest of the County. Given the relatively large portion of Forest Service land in the region, the County should consider adopting trail/bikeway design standards and guidelines that are consistent with US Forest Service Standard Trail Plans and Specifications to help ensure consistent trail designs and dimensions.<sup>1</sup>

### 18.48.140 Bikeways

#### E. Mountain Bike Trails.

1. Mountain bike (dirt or other unpaved surface) trails may be used as recreational or interim transportation facilities.

---

<sup>1</sup> <https://www.fs.usda.gov/managing-land/trails/trail-management-tools/trailplans>

2. Trails used for transportation shall have a two-foot minimum tread width and a six-foot minimum clearing width centered over the trail, and a minimum overhead clearance of seven feet. ~~Trails used solely for recreational use may be narrower with less clearing of vegetation.~~

3. Trail design specifications are encouraged to follow USDA Forest Service Standard Trail Plans and Specifications to ensure a consistent and coherent bike trail network between County and Forest Service lands throughout Deschutes County.





17.48 Table B. Minimum Bikeway Design Standards

Type	Stripe	On/Off Road	Width <sup>1</sup>			Vertical Clearance		Lateral Clearance		Cross Slope Grade	Grade	Pavement Structure	Multi-use	ROW		
			Min.	Stand.	High Use	Min.	Stand.	Min.	Stand.						Stand.	Max.
Paved Multiuse Path		Off	Min.	Stand.	High Use	Min.	Stand.	Min.	Stand.	2%	Stand.	Max.	Aggregate Base	A. C.	Yes	Min.
			8' 10'	10' 12'	12' 14'	8'	10'	2'	3'		5%	>5% up to distance of 500'				
Mt. Bike Trail <sup>2</sup>		Off		2'		7'	10'								Yes	
Bike Lane	8" with painted stencil	On	4' w/open shoulder 5' w/curb or parking	6'								Use on <i>urban</i> arterial or major collector, or rural roads near urban areas with high anticipated bike use	Same as parent roadway		No	
Shoulder Bikeway	4"	On	4' minimum or 6' on high volume roads (state highway or arterials), roads with high use of heavy trucks, buses, and recreational vehicles (Washington Co & Oregon Bicycle and Pedestrian Plan), or on a steep grade (Hood River)	6' standard. 4' w/open shoulder 5' w/curb or other barrier	6' 8'							Recommended on higher speed, and traffic volume rural roads	Same as parent roadway		No	
Shared Roadway		On										Recommended only on local roads with speeds of 25 mph or less, and <3,000 ADT  14-15' lanes preferred; max 16' (Oregon Bicycle and Pedestrian Plan) 10-14' travel lanes with shared land markings and other traffic calming measures to ensure slow speeds; 12-20' total roadway width, if there is no centerline stripe (not including parking lane)	Same as parent roadway		Yes	

Note: A.C. is asphalt-concrete

<sup>1</sup> 10 ft is the standard width for a two-way multi-use path; they should be 12 ft wide in areas with high mixed-use. Faster moving bicyclists require greater width than pedestrians; optimum width should be based on the relative use by these two modes. High use by skaters may also require greater width. ~~The minimum width is 8 ft. However, 8 ft. wide multi-use paths are not recommended in most situations because they may become over-crowded. They should only be constructed as short connectors, or where long term usage is expected to be low, and with proper horizontal and vertical alignment to assure good sight distances.~~

<sup>2</sup> Mountain bike trails and other trails may follow the design specifications of the US Forest Service Standard Trail Plans and Specifications in lieu of County standards. In some cases, US Forest Service standards may be required where trails span County and Forest Service land.



## MEMORANDUM

**Date:** Tuesday, January 31, 2023

**To:** Peter Russell, Nicole Mardell, and Tarik Rawlins, Deschutes County  
Devin Hearing, ODOT

**From:** Karen Swirsky and Katie Popp, Kittelson and Associates  
Brandon Crawford and Matt Hastie, MIG | APG

**Subject:** TCP Active Transportation Update and SCVAP Trails Expansion Outreach – Implementation Measures (Deschutes County TSP)

## INTRODUCTION

This memo provides recommendations for implementing the Sisters Country Vision Action Plan (SCVAP) Trails Expansion Concept Plan and the Tumalo Community Plan (TCP) Active Transportation Final Concept into the Deschutes County Transportation Systems Plan (TSP). The County is currently updating its TSP, and updated goals, policies, and projects should consider the proposed trails and recommendations from both the SCVAP and TCP Active Transportation Concept Plans.

## TSP COORDINATION

### SCVAP Trails Expansion Outreach

In early 2022, Deschutes County received a Transportation and Growth Management Grant to implement Action 4.1 of the Sisters Country Vision Action Plan<sup>1</sup>. The strategy reads:

#### **Livable Sisters Strategy 4 Action 4.1 (Trails Expansion Outreach)**

*“Conduct community outreach to gain input for trail connections between Sisters and Sisters Country.”*

Community engagement and outreach was conducted via an online open house and survey that was designed to gather input on Sisters Country trail needs and to solicit feedback on conceptually proposed

<sup>1</sup> Sisters Country Vision Action Plan: [https://www.ci.sisters.or.us/sites/default/files/fileattachments/community\\_development/page/12721/scv-final-action-plan-updated\\_june\\_2019.pdf](https://www.ci.sisters.or.us/sites/default/files/fileattachments/community_development/page/12721/scv-final-action-plan-updated_june_2019.pdf)

trails. The open house and survey collected 83 comments. A stakeholder advisory committee<sup>2</sup> was also formed to help inform and guide trail proposal recommendations over 3 meetings. Stakeholder advisory committee and community involvement helped inform the Sisters Country Trails Expansion Concept Plan.

### TSP Adoption Recommendations

Proposed trails will be identified in the TSP in the form of a Sisters subarea trails map showing potential alignments (Figure 1<sup>3</sup>).

In addition to the proposed trails, the County may consider adopting policies based on the outcomes of this project. This could be done by incorporating those findings directly into a section of the TSP devoted to this topic or the Concept Plan could be cited in the TSP as a supporting document and potentially included as an appendix or exhibit to the TSP. Specific policy recommendations for incorporation in the TSP include the following:

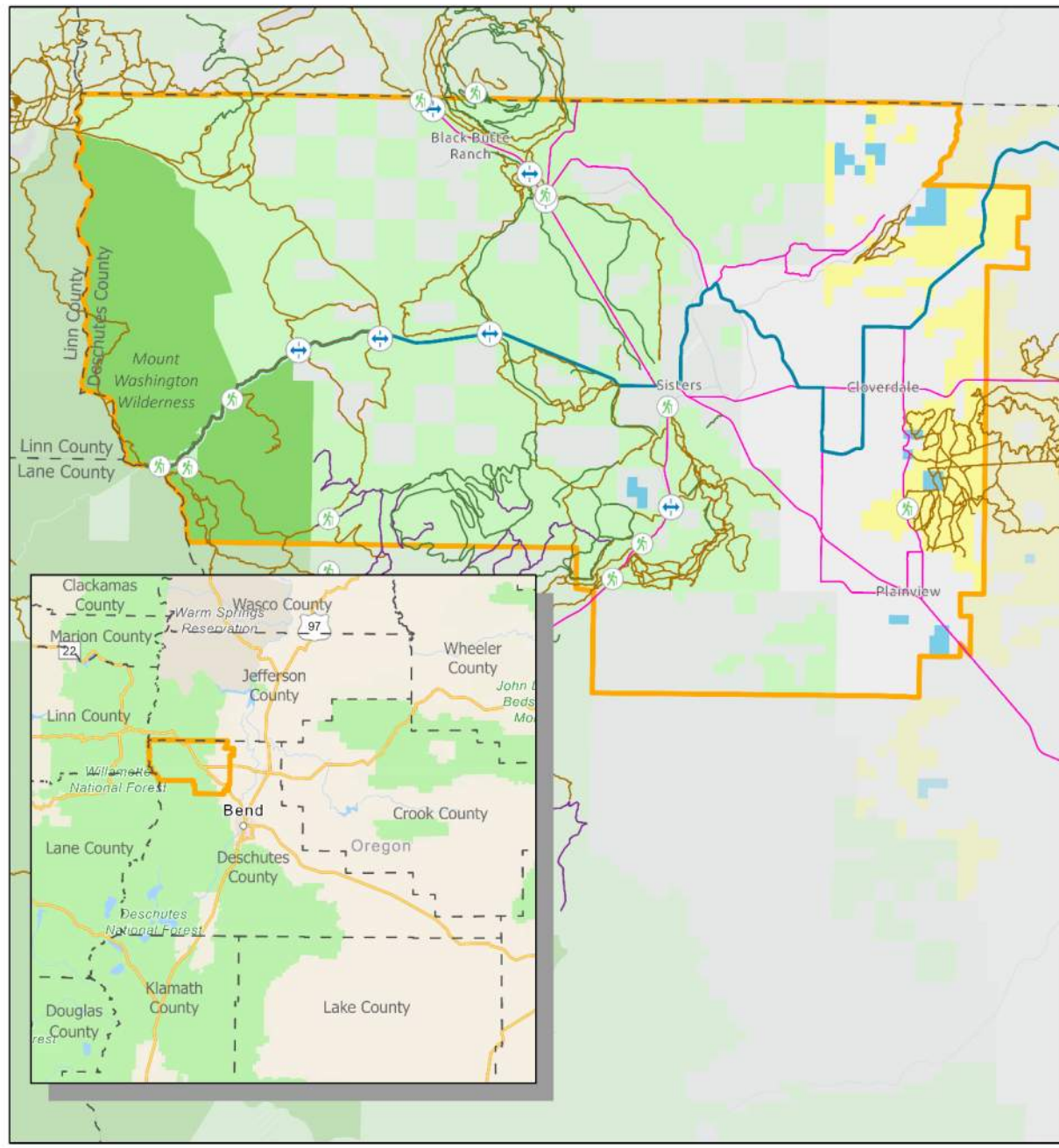
- Consider input from regional non-motorized trails advocacy organizations, such as the STA, COTA, and OET regarding new trails, trail connections, and trail improvements.
- Provide trails that are safe and accessible for bicyclists, pedestrians, and equestrian users.
- Support trail connections to the County’s regional services and amenities.
- Support a trail system that includes trails that are accessible to all users and abilities.
- Coordinate with neighboring counties and other jurisdictions on inter-county or inter-jurisdictional trails.

---

<sup>2</sup> The advisory committee included representatives from the following entities: BOCC, US Forest Services, City of Sisters, ODOT, Deschutes County, BPAC, Equestrian Board, Sisters Trails Alliance, COTA, and Sisters District, among other community representatives.

<sup>3</sup> Note this map is only for reference. The adopted regional trails map for the TSP will be in a different format.

Figure 1: Sisters Trails System



### Sisters Country Trail System

- Existing Trails
- State Scenic Bikeway
- Proposed Equestrian Trails
- Proposed Bike/Hike Trails
- Sisters Country
- County Boundaries
- State Land
- National Wilderness
- BLM
- National Forest
- Trailhead
- Crossing Points/Potential Crossings



## Tumalo Community Plan (TCP) Active Transportation Update

Over the past decade, the Tumalo unincorporated community has seen significant growth in its core area, including several new businesses, restaurants, and other amenities. As a result of this growth, Deschutes County is currently going through the process of updating the 2010-2030 Tumalo Community Plan (TCP) to 2020-2040<sup>4</sup>. The County received a Transportation Grant Management (TGM) from the State, of which a portion is dedicated to updating the active transportation element (bike/ped/transit) of the Tumalo Community Plan.

Two public engagement opportunities and discussions with the TCP Active Transportation Advisory committee informed the Final Concept Plan, which established recommendations for sidewalk, trail, traffic calming, and bicycle improvements in Tumalo. The Final Concept Plan will be identified in the TSP in the form of a Tumalo area map showing proposed improvements to active transportation facilities in Tumalo, shown in Figure 2<sup>5</sup>.

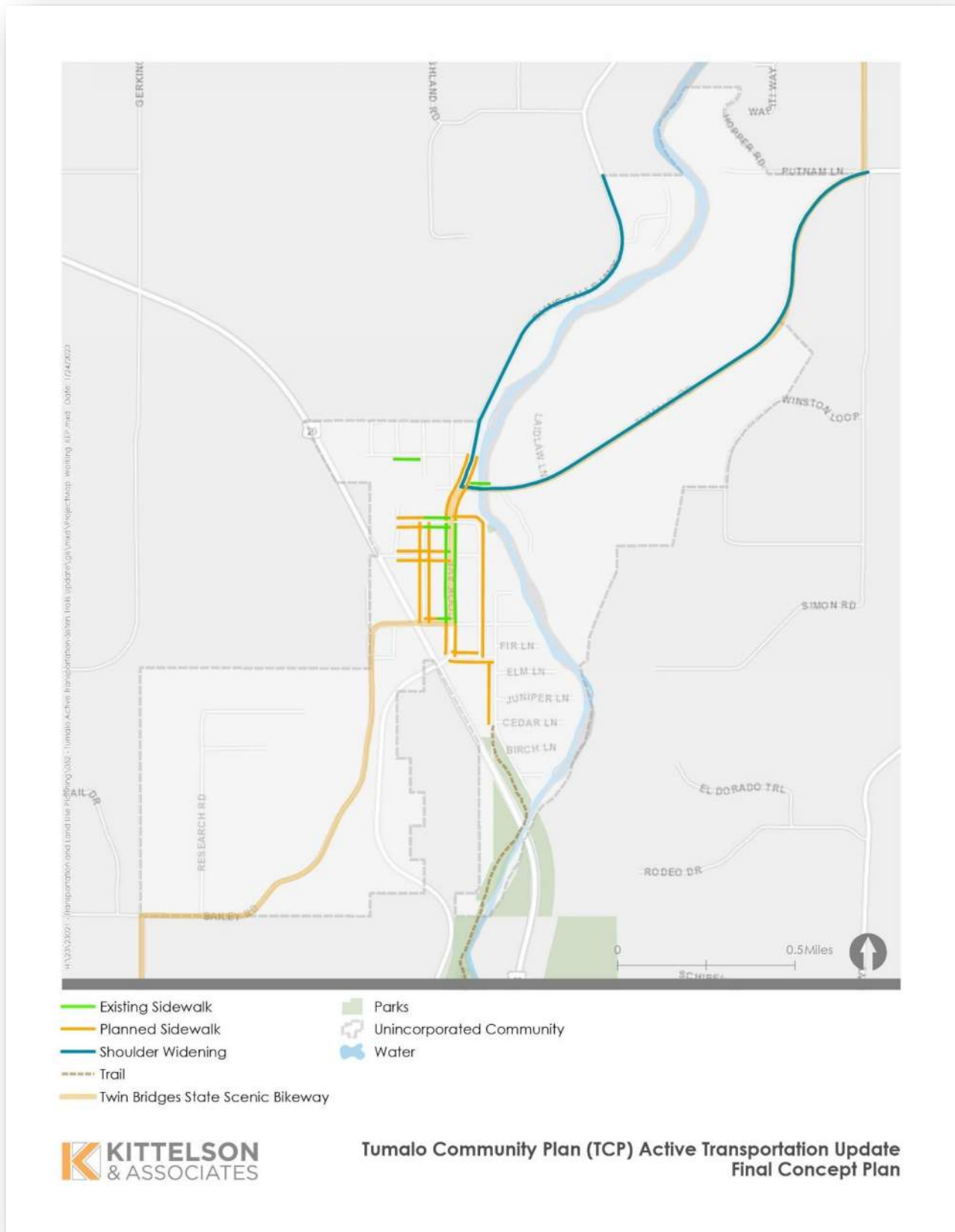
### TSP Adoption Recommendations

The project team does not recommend any additional recommendations beyond Figure 2 to incorporate into the TSP as a result of this project.

<sup>4</sup> Tumalo Community Plan (TCP) update website: <https://www.deschutes.org/cd/page/tumalo-community-plan-update>

<sup>5</sup> Note this map is only for reference. The adopted regional trails map for the TSP will be in a different format.

Figure 2: TCP Active Transportation Update Final Concept





# Tumalo Community Plan (TCP) Active Transportation Update

## ODOT Planning Project Title VI Report

March 2023

### Project Overview

The Tumalo Community Plan (TCP) Active Transportation Update project focuses on planning efforts for the Active Transportation component of the 2040 Tumalo Community Plan (TCP). Over the past two decades, there have been significant changes in and around Tumalo that have galvanized the transition of the Tumalo core into an active community center. These changes have warranted an update to the Active Transportation element of the Tumalo Community Plan (TCP) to support the growth of a vibrant, livable community with increased transportation choices, including to bicycling, walking, and transit.



15 people attended the Tumalo Active Transportation Walking Tour held on June 8th, 2022, to identify needs and deficiencies in the active transportation network in Tumalo.

### Analysis

- Review state, regional, and local plans regarding active transportation (bicycle, pedestrian, and transit) for relevant goals, policies, and objectives.
- Identify context sensitive projects related to Safety and Speed Improvements, Pedestrian Connectivity, and Transit to address existing gaps and deficiencies in the active transportation network in Tumalo.

### Key Elements

- Active community engagement (virtual and in-person)
- Improve safety, access, and mobility for people walking, and biking in Tumalo.
- Identify a preferred intersection improvement for the Cline Falls Highway and Tumalo Road intersection.
- Identify a preferred transit stop location if a transit stop is added to a Cascade East Transit (CET) route.

### Outreach and Public Involvement

Public involvement and outreach for the TCP Active Transportation Update project included the following:

1. Tumalo Active Transportation Walking Tour (Wednesday, June 8<sup>th</sup>, 2022)
2. Interactive Virtual StoryMap (June 8<sup>th</sup> – July 13<sup>th</sup>, 2022)
3. Virtual open house (October 5<sup>th</sup>- 24<sup>th</sup>, 2022)

The Tumalo Community Plan Open House, walking tour, and interactive StoryMap supported the development of the Initial Concept Plan. The Initial Concept Plan was then presented in the virtual open house, which gave the public the opportunity to comment on the initial plan and provide any additional feedback to be included in the development of the Final Concept Plan.

In addition to the three public events that were specifically created to receive public input on the Tumalo Active Transportation Plan update, Deschutes County held an Open House for the entire Tumalo Community Plan Update on Wednesday, May 11<sup>th</sup>, 2022. The Open House included a table introducing the Active Transportation plan update.

The TCP Active Transportation Advisory Committee also met four times throughout the project. The Committee consisted of community, regional, and State agencies with local and technical expertise related to active transportation in Tumalo. Some of the interests represented included school districts, local businesses, bicycle and pedestrian advocates, and County and State agencies. Committee members were responsible for reviewing and providing input on various elements of the project.



# Tumalo Community Plan (TCP) Active Transportation Update

## Project Information Sheet

March 2023

### Project Overview

The Tumalo Community Plan (TCP) Active Transportation Update project focuses on planning efforts for the Active Transportation component of the 2040 Tumalo Community Plan (TCP). Over the past two decades, there have been significant changes in and around Tumalo that have contributed to the transition of the Tumalo core into an active community center. These changes have warranted an update to the Active Transportation element of the Tumalo Community Plan (TCP) to support the growth of a vibrant, livable community with increased active transportation choices including bicycling, walking, and transit.



Looking at east sidewalks on 4th Street east of the downtown core.

### Project Outcomes

- Reviewed state, regional, and local plans regarding active transportation (bicycle, pedestrian, and transit) for relevant goals, policies, and objectives.
- Provided multiple opportunities for public engagement and involvement, including virtual and in-person engagement opportunities.
- Developed a Final Concept Plan that identifies context sensitive projects related to Safety and Speed Improvements, Pedestrian Connectivity, and Transit to address existing gaps and deficiencies in the active transportation network in Tumalo.
- Provided materials and exhibits for amendments to the Tumalo Community Plan (TCP) and County Transportation System Plan (TSP) to implement the suggested recommendations for active transportation.

### Outreach and Public Involvement

Public involvement and outreach for the TCP Active Transportation Update project included the following:

1. Tumalo Active Transportation Walking Tour (Wednesday, June 8<sup>th</sup>, 2022)
2. Interactive Virtual StoryMap (June 8<sup>th</sup> – July 13<sup>th</sup>, 2022)
3. Virtual open house (October 5<sup>th</sup>- 24<sup>th</sup>, 2022)

In addition to the three public events that were specifically created to receive public input on the Tumalo Active Transportation Plan update, Deschutes County held an Open House for the entire Tumalo Community Plan Update on Wednesday, May 11<sup>th</sup>, 2022. The Open House included a table introducing the Active Transportation plan update.

The TCP Active Transportation Advisory Committee also met four times throughout the project. The Committee consisted of community, regional, and State agencies with local and technical expertise related to active transportation in Tumalo. The interests represented included residents, school districts, local businesses, bicycle and pedestrian advocates, and County and State agencies. Committee members were responsible for reviewing and providing input on various elements of the project.

### What's Next?

The County will consider adopting the revised Active Transportation Elements map as part of the County Transportation Plan Update, with adoption expected the spring of 2023.





BOARD OF  
COMMISSIONERS

# AGENDA REQUEST & STAFF REPORT

**MEETING DATE:** March 27, 2024

**SUBJECT:** Treasury Report for February 2024

**ATTENDANCE:**

*Bill Kuhn, County Treasurer*



**MEMORANDUM**

**DATE:** March 18, 2024  
**TO:** Board of County Commissioners  
**FROM:** Bill Kuhn, Treasurer  
**SUBJECT:** Treasury Report for February 2024

Following is the unaudited monthly treasury report for fiscal year to date (YTD) as of February 29, 2024.

**Treasury and Investments**

- The portfolio balance at the end of January was \$343.1 million, an increase of \$14.1 million from January and an increase of \$23.7 million from last year (Feb 2023).
- Net investment income for February was \$885K, approximately \$33K less than last month and \$345K greater than February 2023. YTD earnings of \$5,763,458 are \$2,675,653 more than the YTD earnings last year.
- All portfolio category balances are within policy limits.
- The LGIP interest rate increased to 5.20% during the month of February. Benchmark returns for 24-month treasuries were unchanged and 36-month treasuries are down by 1 basis point from the prior month.
- The average portfolio yield is 3.47%, which improved over last month's average of 3.32%.
- The portfolio weighted average time to maturity is 0.96 years, down slightly from 1.05 in January 2024.

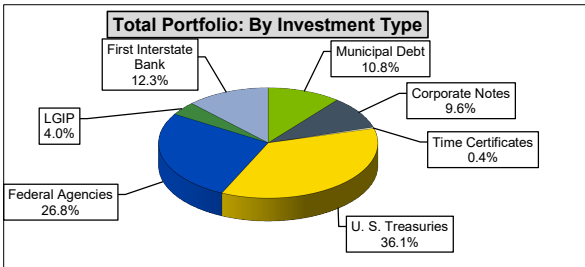
**Deschutes County**



**Total Investment Portfolio As Of 2/29/2024**

Portfolio Breakdown: Par Value by Investment Type		
Municipal Debt	\$ 37,205,000	10.8%
Corporate Notes	32,821,000	9.6%
Time Certificates	1,245,000	0.4%
U.S. Treasuries	124,000,000	36.1%
Federal Agencies	91,900,000	26.8%
LGIP	13,619,878	4.0%
First Interstate (Book Balance)	42,259,816	12.3%
<b>Total Investments</b>	<b>\$ 343,050,694</b>	<b>100.0%</b>

Investment Income		
	Feb-24	Y-T-D
<b>Total Investment Income</b>	\$ 890,209	\$ 5,803,458
Less Fee: \$5,000 per month	(5,000)	(40,000)
<b>Investment Income - Net</b>	<b>\$ 885,209</b>	<b>\$ 5,763,458</b>
<b>Prior Year Comparison</b>	<b>Feb-23</b>	<b>\$ 3,087,805</b>

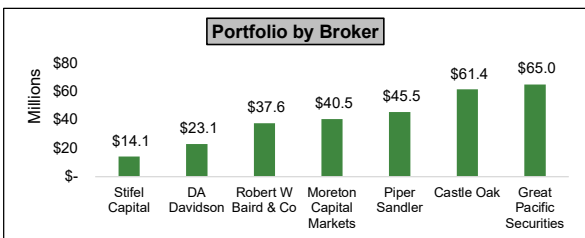


Category Maximums:	
U.S. Treasuries	100%
LGIP (\$59,847,000)	100%
Federal Agencies	100%
Banker's Acceptances	25%
Time Certificates	50%
Municipal Debt	25%
Corporate Debt	25%

Yield Percentages		
	Current Month	Prior Month
FIB/ LGIP	5.20%	5.00%
Investments	3.13%	3.49%
<b>Average</b>	<b>3.47%</b>	<b>3.32%</b>

Maturity (Years)	
Max	Weighted Average
2.96	0.96

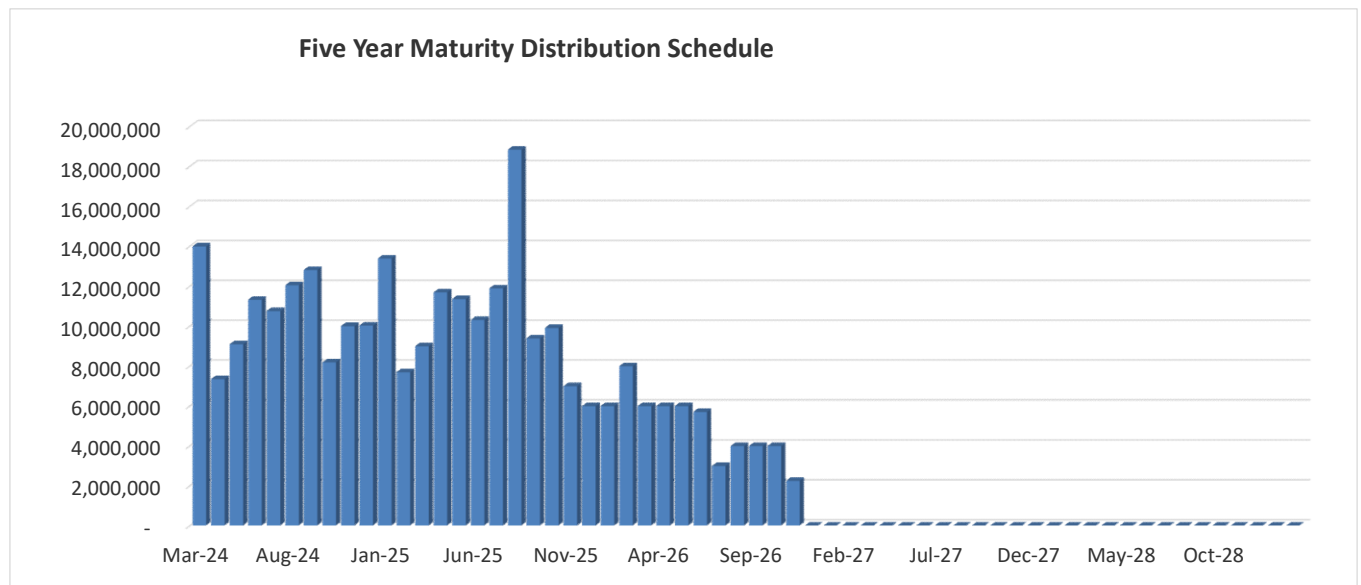
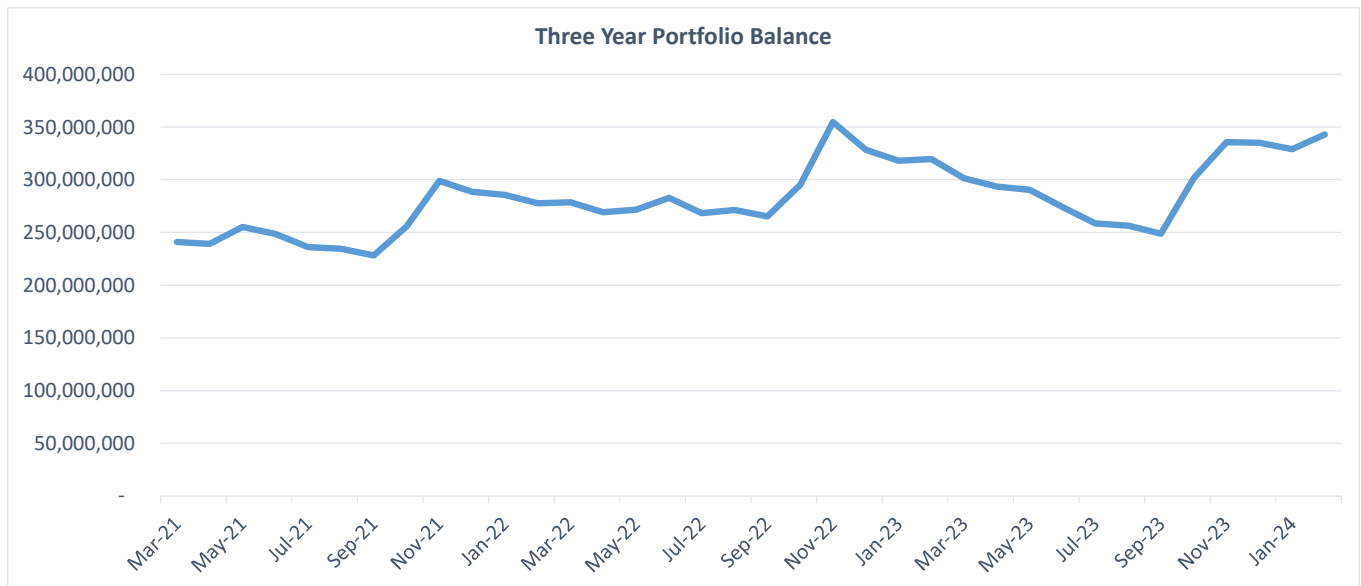
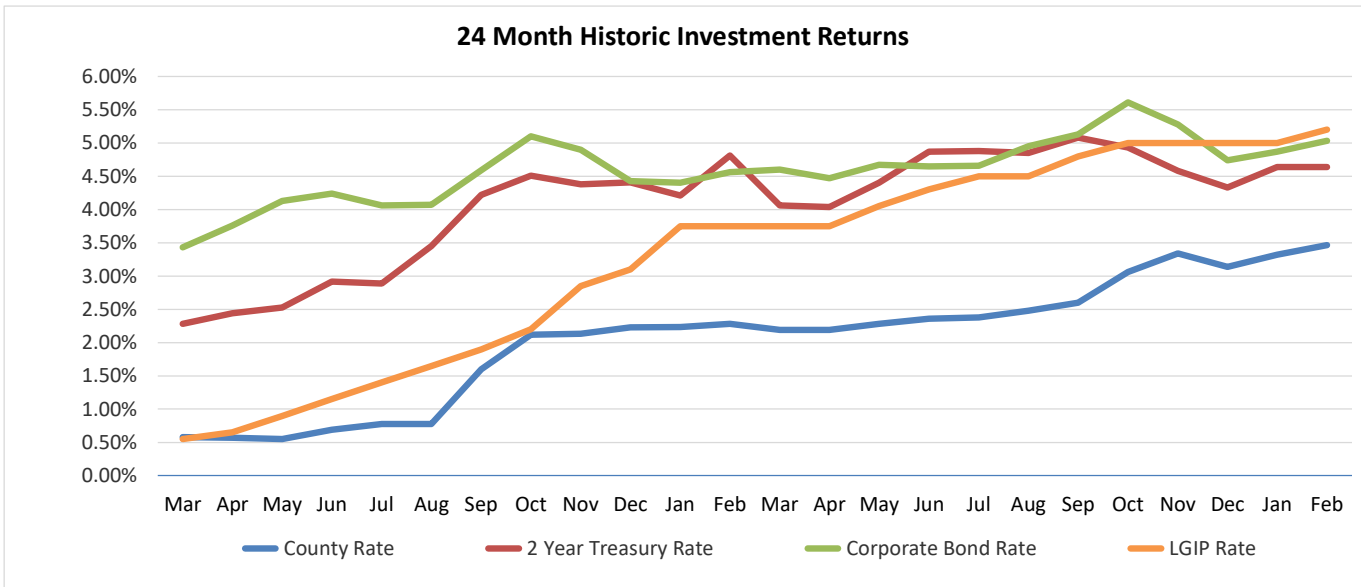
Benchmarks	
24 Month Treasury	4.64%
LGIP Rate	5.20%
36 Month Treasury	4.43%



Term	Minimum	Actual
0 to 30 Days	10%	20.4%
Under 1 Year	25%	53.2%
Under 5 Years	100%	100.0%

Other	Policy	Actual
Corp Issuer	5%	1.6%
Callable	25%	12.1%
<b>Weighted Ave.</b>	<b>AA2</b>	<b>AA1</b>

Investment Activity	
Purchases in Month	\$ 15,000,000
Sales/Redemptions in Month	\$ 7,000,000











BOARD OF  
COMMISSIONERS

## AGENDA REQUEST & STAFF REPORT

**MEETING DATE:** March 27, 2024

**SUBJECT:** Finance Report for February 2024

**ATTENDANCE:**

Robert Tintle, Chief Financial Officer



**MEMORANDUM**

**DATE:** March 27, 2024  
**TO:** Board of County Commissioners  
**FROM:** Robert Tintle, Chief Financial Officer  
**SUBJECT:** Finance Report for February 2024

Following is the unaudited monthly finance report for fiscal year to date (YTD) as of February 29, 2024.

**Budget to Actuals Report**

General Fund

- *Revenue* YTD in the General Fund is \$42.0M or 94.4% of budget. By comparison, last year revenue YTD was \$40.0M and 91.5% of budget.
- *Expenses* YTD are \$29.4M and 63.5% of budget. By comparison, last year expenses YTD were \$28.7M and 63.3% of budget.
- *Beginning Fund Balance* is \$14.0M or 101.1% of the budgeted \$13.8M beginning fund balance.



County Wide Financial Dashboard

001 - General Fund

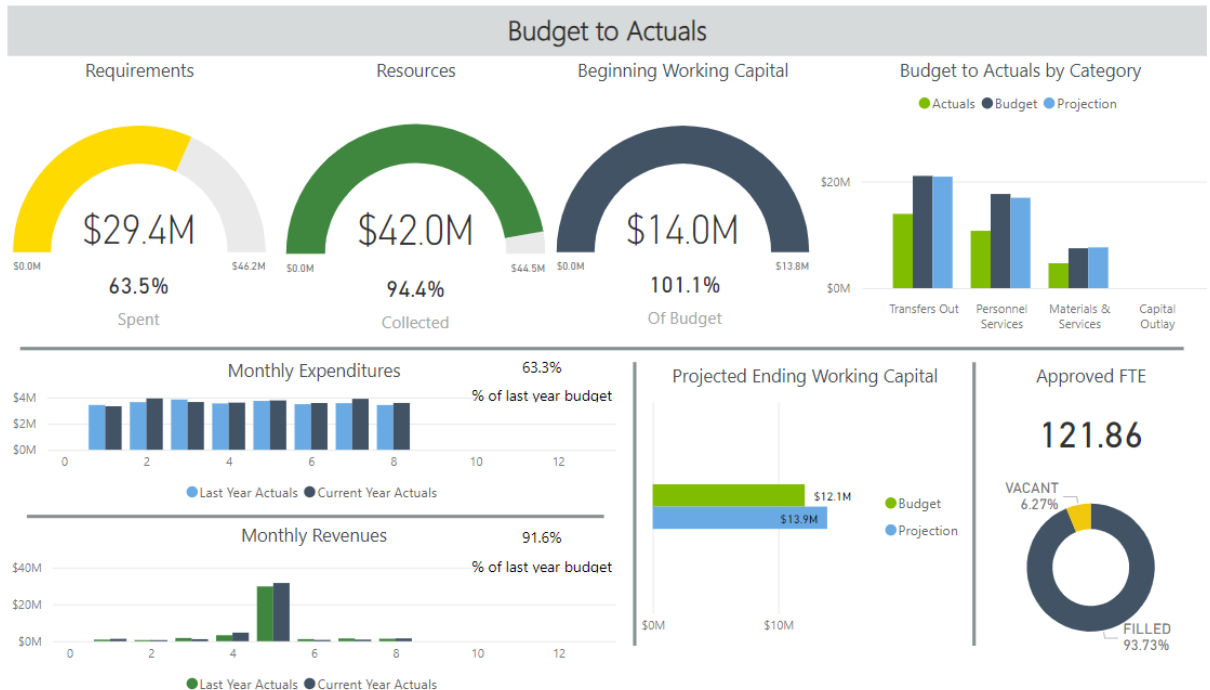
Thru GL Period: 8  
 66.7%  
 Year Complete

- Fund
- Select all
  - (Blank)
  - 001 - General Fund
  - 010 - Assmt-Clerk...
  - 020 - Code Abate...
  - 030 - Community ...
  - 040 - Court Techn...
  - 050 - Economic D...
  - 060 - General Cou...
  - 070 - General Cou...
  - 090 - Project Dev...
  - 120 - Law Library
  - 130 - Park Acquisi...
  - 132 - Park Develo...

Monthly GL Peri...  
 0  
 8

**\$12.1M**  
 Contingency

(Blank)  
 Reserves



All Major Funds

On the attached pages you will find the Budget to Actuals Report for the County's major funds with actual revenue and expense data compared to budget through February 29, 2024.



Position Control Summary

Position Control Summary FY24														July - June
Org		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	Percent Unfilled
Assessor	Filled	31.63	31.63	31.63	31.63	30.00	31.00	30.63	30.63					
	Unfilled	3.63	3.63	3.63	3.63	5.26	4.26	4.64	4.64					11.81%
Clerk	Filled	9.48	10.48	10.48	9.90	9.90	10.48	10.48	10.48					
	Unfilled	1.00	-	-	0.58	0.58	-	-	-					2.58%
BOPTA	Filled	0.52	0.52	0.10	0.10	0.10	0.52	0.52	0.52					
	Unfilled	-	-	0.42	0.42	0.42	-	-	-					30.24%
DA	Filled	57.90	58.90	58.90	59.40	59.90	59.10	59.10	58.10					
	Unfilled	3.20	2.20	2.20	1.70	1.20	2.00	2.00	3.00					3.58%
Tax	Filled	6.50	6.50	6.50	6.50	6.50	6.50	6.50	6.50					
	Unfilled	-	-	-	-	-	-	-	-					0.00%
Veterans'	Filled	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00					
	Unfilled	-	-	-	-	-	-	-	-					0.00%
Property Mgmt	Filled	2.00	2.00	2.00	3.00	3.00	3.00	3.00	3.00					
	Unfilled	1.00	1.00	1.00	-	-	-	-	-					12.50%
Total General Fund	Filled	113.03	115.03	114.61	115.53	114.40	115.60	115.23	114.23	-	-	-	-	
	Unfilled	8.83	6.83	7.25	6.33	7.46	6.26	6.64	7.64	-	-	-	-	5.87%
Justice Court	Filled	4.60	4.60	4.60	4.60	4.60	3.60	3.60	3.60					
	Unfilled	-	-	-	-	-	1.00	1.00	1.00					8.15%
Community Justice	Filled	45.00	43.00	45.00	45.00	46.00	48.00	48.00	47.00					
	Unfilled	4.00	6.00	4.00	4.00	3.00	1.00	1.00	2.00					6.38%
Sheriff	Filled	233.75	232.75	229.75	229.75	228.75	229.75	228.75	228.75					
	Unfilled	37.25	38.25	41.25	41.25	42.25	41.25	42.25	42.25					15.04%
Houseless Effort	Filled	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
	Unfilled	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00					50.00%
Health Svcs	Filled	381.55	376.95	378.75	383.40	384.40	386.40	390.33	395.23					
	Unfilled	33.25	37.85	37.05	32.60	34.60	32.60	30.68	25.78					7.91%
CDD	Filled	54.80	54.80	52.80	52.00	48.00	47.00	45.00	44.00					
	Unfilled	3.20	3.20	5.20	6.00	10.00	11.00	13.00	14.00					14.14%
Road	Filled	57.00	57.00	57.00	55.00	56.00	59.00	59.00	60.00					
	Unfilled	5.00	5.00	5.00	7.00	6.00	3.00	3.00	2.00					7.26%
Adult P&P	Filled	33.75	33.75	33.75	33.75	32.75	33.75	32.75	32.75					
	Unfilled	6.00	6.00	6.00	6.00	7.00	6.00	7.00	7.00					16.04%
Solid Waste	Filled	29.00	31.00	30.00	30.00	30.00	32.00	31.00	36.00					
	Unfilled	12.00	10.00	11.00	11.00	11.00	9.00	10.00	5.00					24.09%
Victims Assistance	Filled	6.50	7.50	7.50	9.50	9.50	9.50	9.50	9.50					
	Unfilled	3.00	2.00	2.00	-	-	-	-	-					9.21%
GIS Dedicated	Filled	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00					
	Unfilled	-	-	-	-	-	-	-	-					0.00%
Fair & Expo	Filled	11.75	11.75	11.75	10.75	10.75	10.50	11.50	12.50					
	Unfilled	5.75	5.75	5.75	6.75	6.75	6.00	6.00	5.00					34.35%
Natural Resource	Filled	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00					
	Unfilled	-	-	-	-	-	-	-	-					0.00%
ISF - Facilities	Filled	23.75	22.75	22.75	22.75	22.75	23.75	23.75	23.75					
	Unfilled	3.00	4.00	4.00	4.00	4.00	3.00	3.00	3.00					13.08%
ISF - Admin	Filled	9.75	9.75	9.75	8.75	8.75	8.75	8.75	8.75					
	Unfilled	-	-	-	1.00	1.00	1.00	1.00	1.00					6.41%
ISF - BOCC	Filled	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00					
	Unfilled	-	-	-	-	-	-	-	-					0.00%
ISF - Finance	Filled	12.00	12.00	12.00	12.00	12.00	12.00	12.00	11.00					
	Unfilled	1.00	1.00	1.00	1.00	1.00	1.00	1.00	2.00					8.65%
ISF - Legal	Filled	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00					
	Unfilled	-	-	-	-	-	-	-	-					0.00%
ISF - HR	Filled	8.80	8.80	8.80	8.80	8.80	9.80	9.80	8.80					
	Unfilled	1.20	1.20	1.20	1.20	1.20	0.20	0.20	1.20					9.50%
ISF - IT	Filled	17.00	17.00	17.00	17.00	17.00	17.00	17.00	17.00					
	Unfilled	-	-	-	-	-	1.00	1.00	1.00					2.16%
ISF - Risk	Filled	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25					
	Unfilled	-	-	-	-	-	-	-	-					0.00%
911	Filled	53.00	55.00	55.00	54.57	54.57	56.10	56.10	54.53					
	Unfilled	7.00	5.00	5.00	5.43	5.43	3.91	3.91	6.48					8.76%
<b>Total:</b>														
	Filled	1,113.28	1,111.68	1,109.06	1,111.40	1,107.27	1,120.75	1,120.30	1,125.63	-	-	-	-	
	Unfilled	131.48	133.08	136.70	134.56	141.69	128.22	131.67	127.34	-	-	-	-	
	Total	1,244.76	1,244.76	1,245.76	1,245.96	1,248.96	1,248.96	1,251.96	1,252.96	A	-	-	-	
	% Unfilled	10.56%	10.69%	10.97%	10.80%	11.34%	10.27%	10.52%	10.16%					10.66%

A 1.0 FTE increase in 911



**Budget to Actuals - Total Personnel and Overtime Report**  
**FY24 YTD February 29, 2024**

Fund	Total Personnel Costs				Overtime		
	Budgeted Personnel Costs	Actual Personnel Costs	Projected Personnel Costs	Projection (Over) / Under Budget	Budgeted OT	Actual OT	(Over) / Under Budget
001 - General Fund	\$ 17,670,095	\$ 10,761,052	\$ 16,963,817	\$ 706,278	\$ 72,800	\$ 13,381	\$ 59,419
030 - Juvenile	6,852,966	4,146,909	6,452,583	400,383	50,000	64,771	(14,771)
160/170 - TRT	228,267	146,856	228,267	-	-	-	-
200 - ARPA	928,596	605,674	928,596	-	-	-	-
220 - Justice Court	651,767	437,719	644,090	7,677	-	-	-
255 - Sheriff's Office	47,515,968	28,713,730	44,296,927	3,219,041	1,989,500	1,728,382	261,118
274 - Health Services	50,537,530	32,462,275	51,471,017	(933,487)	200	72,545	(72,345)
295 - CDD	8,219,303	4,704,394	7,362,321	856,982	38,000	7,103	30,897
325 - Road	8,406,468	5,332,371	7,961,103	445,365	100,000	147,370	(47,370)
355 - Adult P&P	5,907,511	3,391,458	5,178,183	729,328	9,000	5,891	3,109
465 - Road CIP	-	-	-	-	-	-	-
610 - Solid Waste	4,108,983	2,354,006	4,020,900	88,083	95,000	45,493	49,507
615 - Fair & Expo	1,896,951	973,790	1,468,659	428,292	40,000	62,277	(22,277)
616 - Annual County Fair	276,531	114,650	227,432	49,099	-	900	(900)
617 - Fair & Expo Capital Reserve	-	-	-	-	-	-	-
618 - RV Park	91,328	58,756	93,047	(1,719)	5,500	2,673	2,827
619 - RV Park Reserve	-	-	-	-	-	-	-
670 - Risk Management	452,463	292,073	459,521	(7,058)	-	-	-
675 - Health Benefits	-	-	-	-	-	-	-
705 - 911	9,032,045	5,545,257	8,477,752	554,293	445,000	219,024	225,976
999 - All Other Funds	16,315,342	9,590,501	16,239,066	76,276	38,000	29,166	8,834
<b>Total</b>	<b>\$ 179,092,114</b>	<b>\$ 109,631,470</b>	<b>\$ 172,473,281</b>	<b>\$ 6,618,833</b>	<b>\$ 2,883,000</b>	<b>\$ 2,398,976</b>	<b>\$ 484,024</b>



# Budget to Actuals - Countywide Summary

## All Departments

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%
	Budget	Actuals	%	Budget	Actuals	%		
001 - General Fund	43,472,708	43,034,834	99%	44,408,216	41,975,570	95%	45,357,193	102%
030 - Juvenile	1,010,203	1,050,931	104%	1,014,168	495,341	49%	1,007,952	99%
160/170 - TRT	13,631,282	12,748,688	94%	12,751,790	9,664,861	76%	12,332,271	97%
200 - ARPA	105,186	14,955,890	999%	14,458,597	9,688,575	67%	9,771,562	68%
220 - Justice Court	525,032	518,001	99%	525,540	333,906	64%	526,550	100%
255 - Sheriff's Office	49,577,055	50,672,726	102%	58,558,288	55,117,097	94%	58,983,918	101%
274 - Health Services	57,787,985	55,638,108	96%	60,022,483	43,332,357	72%	59,353,570	99%
295 - CDD	11,675,519	9,455,886	81%	10,460,840	5,398,531	52%	8,169,532	78%
325 - Road	24,889,063	25,698,009	103%	26,673,711	18,273,928	69%	26,543,853	100%
355 - Adult P&P	6,134,018	6,295,372	103%	5,535,606	3,210,399	58%	5,895,778	107%
465 - Road CIP	1,943,063	782,549	40%	2,179,426	2,209,427	101%	3,054,430	140%
610 - Solid Waste	14,503,499	13,899,874	96%	15,995,411	11,572,954	72%	17,198,091	108%
615 - Fair & Expo	1,738,534	2,260,708	130%	2,343,500	1,709,891	73%	2,498,663	107%
616 - Annual County Fair	1,969,380	2,359,790	120%	2,324,117	2,470,584	106%	2,478,436	107%
617 - Fair & Expo Capital Reserve	7,414	317,269	999%	64,800	189,653	293%	212,889	329%
618 - RV Park	642,252	579,826	90%	530,800	332,252	63%	496,135	93%
619 - RV Park Reserve	6,298	21,589	343%	34,300	28,746	84%	40,900	119%
670 - Risk Management	3,311,477	3,297,596	100%	3,364,344	2,369,585	70%	3,446,044	102%
675 - Health Benefits	23,658,700	25,492,341	108%	30,654,045	20,094,063	66%	32,091,892	105%
705 - 911	13,744,678	14,120,981	103%	14,034,323	12,215,193	87%	14,176,134	101%
999 - Other	62,651,873	65,511,028	105%	81,766,214	51,736,471	63%	80,373,453	98%
<b>TOTAL RESOURCES</b>	<b>332,985,219</b>	<b>348,711,997</b>	<b>105%</b>	<b>387,700,519</b>	<b>292,419,383</b>	<b>75%</b>	<b>384,009,246</b>	<b>99%</b>

REQUIREMENTS	Fiscal Year 2023			Fiscal Year 2024			Projection	%
	Budget	Actuals	%	Budget	Actuals	%		
001 - General Fund	24,337,373	23,057,601	95%	25,155,807	15,435,892	61%	24,613,879	98%
030 - Juvenile	7,928,538	7,497,365	95%	8,481,279	5,131,635	61%	8,029,368	95%
160/170 - TRT	13,123,218	11,822,231	90%	6,902,223	5,735,378	83%	6,789,274	98%
200 - ARPA	23,129,361	14,662,784	63%	9,837,656	2,114,544	21%	9,753,207	99%
220 - Justice Court	766,183	742,697	97%	822,370	553,877	67%	814,693	99%
255 - Sheriff's Office	60,415,533	58,373,715	97%	65,641,097	38,201,950	58%	62,210,294	95%



# Budget to Actuals - Countywide Summary

## All Departments

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**

Year Complete

<b>274 - Health Services</b>	70,979,127	62,912,108	89%	71,986,444	41,660,335	58%	68,047,705	95%
<b>295 - CDD</b>	11,233,304	9,466,620	84%	10,269,561	5,836,017	57%	9,165,048	89%
<b>325 - Road</b>	16,188,996	13,822,550	85%	17,124,761	9,259,582	54%	15,941,116	93%
<b>355 - Adult P&amp;P</b>	7,575,910	6,790,874	90%	7,576,032	4,421,426	58%	6,893,183	91%
<b>465 - Road CIP</b>	28,387,166	16,897,136	60%	23,772,827	15,401,342	65%	23,368,287	98%
<b>610 - Solid Waste</b>	11,754,672	10,769,061	92%	14,404,234	7,881,123	55%	14,304,635	99%
<b>615 - Fair &amp; Expo</b>	3,098,054	3,330,291	107%	3,734,327	2,254,622	60%	3,463,091	93%
<b>616 - Annual County Fair</b>	1,972,030	2,067,492	105%	2,582,856	2,182,702	85%	2,332,390	90%
<b>617 - Fair &amp; Expo Capital Reserve</b>	870,000	483,310	56%	1,090,000	310,798	29%	1,090,000	100%
<b>618 - RV Park</b>	594,181	498,157	84%	617,131	372,631	60%	542,706	88%
<b>619 - RV Park Reserve</b>	100,000	5,532	6%	174,000	16,870	10%	174,000	100%
<b>670 - Risk Management</b>	5,887,806	2,915,728	50%	4,744,447	2,793,837	59%	4,510,027	95%
<b>675 - Health Benefits</b>	31,769,217	30,688,534	97%	32,587,213	18,363,326	56%	31,587,213	97%
<b>705 - 911</b>	17,709,497	13,390,020	76%	15,113,760	9,037,000	60%	14,559,467	96%
<b>999 - Other</b>	108,884,843	63,570,653	58%	93,813,865	34,384,512	37%	83,017,341	88%
<b>TOTAL REQUIREMENTS</b>	<b>446,705,009</b>	<b>353,764,458</b>	<b>79%</b>	<b>416,431,890</b>	<b>221,349,397</b>	<b>53%</b>	<b>391,206,925</b>	<b>94%</b>



# Budget to Actuals - Countywide Summary

## All Departments

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

TRANSFERS	Fiscal Year 2023			Fiscal Year 2024			Projection	%
	Budget	Actuals	%	Budget	Actuals	%		
001 - General Fund	(20,871,416)	(19,890,038)	95%	(20,963,314)	(13,872,992)	66%	(20,824,540)	99%
030 - Juvenile	6,452,997	6,452,997	100%	6,678,013	4,482,000	67%	6,678,013	100%
160/170 - TRT	(6,021,446)	(5,874,627)	98%	(8,575,254)	(4,673,802)	55%	(8,070,359)	94%
200 - ARPA	-	-		(5,022,145)	(400,000)	8%	(400,000)	8%
220 - Justice Court	263,217	224,696	85%	364,688	243,120	67%	364,688	100%
255 - Sheriff's Office	3,448,587	3,449,109	100%	3,377,587	2,273,247	67%	3,377,587	100%
274 - Health Services	8,007,942	5,850,465	73%	8,026,456	4,163,697	52%	7,146,045	89%
295 - CDD	(911,585)	(835,505)	92%	466,530	114,440	25%	672,799	144%
325 - Road	(12,330,136)	(12,330,136)	100%	(12,700,000)	(7,700,000)	61%	(12,700,000)	100%
355 - Adult P&P	267,532	267,532	100%	510,950	307,304	60%	510,950	100%
465 - Road CIP	14,230,313	12,238,662	86%	12,500,000	5,000,000	40%	12,500,000	100%
610 - Solid Waste	(5,299,665)	(3,453,962)	65%	(2,613,962)	(1,309,304)	50%	(2,613,962)	100%
615 - Fair & Expo	704,127	621,827	88%	875,681	583,784	67%	841,929	96%
616 - Annual County Fair	(156,706)	(156,706)	100%	(34,503)	(23,000)	67%	(34,503)	100%
617 - Fair & Expo Capital Reserve	1,149,827	1,113,829	97%	824,187	582,776	71%	809,723	98%
618 - RV Park	(81,566)	(81,566)	100%	128,436	138,952	108%	128,436	100%
619 - RV Park Reserve	261,750	261,566	100%	51,564	34,376	67%	51,564	100%
670 - Risk Management	(3,500)	(3,500)	100%	(153,500)	(120,328)	78%	(153,500)	100%
705 - 911	(59,900)	(59,900)	100%	-	-		-	
999 - Other	10,959,373	12,205,258	111%	16,258,586	10,175,730	63%	11,715,130	72%
<b>TOTAL TRANSFERS</b>	<b>9,745</b>	<b>-</b>	<b>0</b>	<b>-</b>	<b>-</b>		<b>-</b>	



# Budget to Actuals - Countywide Summary

## All Departments

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

ENDING FUND BALANCE	Fiscal Year 2023			Fiscal Year 2024			
	Budget	Actuals	%	Budget	Actuals	Projection	%
001 - General Fund	11,239,637	13,984,329	124%	12,115,095	26,651,015	13,903,104	115%
030 - Juvenile	634,663	1,528,688	241%	710,902	1,374,395	1,185,285	167%
160/170 - TRT	4,000,000	4,527,362	113%	1,801,675	3,783,043	2,000,000	111%
200 - ARPA	-	401,204	999%	-	7,575,235	19,559	999%
220 - Justice Court	22,066	-	0%	67,858	23,150	76,545	113%
255 - Sheriff's Office	7,024,650	11,001,214	157%	7,295,992	30,189,608	11,152,425	153%
274 - Health Services	6,045,519	12,519,113	207%	7,480,011	18,354,833	10,971,024	147%
295 - CDD	1,627,134	1,322,717	81%	1,975,730	999,672	1,000,000	51%
325 - Road	2,262,898	7,351,679	325%	2,370,201	8,666,025	5,254,416	222%
355 - Adult P&P	1,925,640	3,010,934	156%	1,470,524	2,107,212	2,524,479	172%
465 - Road CIP	12,334,484	23,347,907	189%	9,918,979	15,155,992	15,534,050	157%
610 - Solid Waste	556,359	2,743,514	493%	1,393,600	5,126,041	3,023,008	217%
615 - Fair & Expo	315,960	547,764	173%	32,617	586,817	425,265	999%
616 - Annual County Fair	225,358	521,447	231%	228,205	786,328	632,990	277%
617 - Fair & Expo Capital Reserve	1,587,183	2,757,229	174%	2,391,825	3,218,860	2,689,840	112%
618 - RV Park	82,920	166,640	201%	135,220	265,213	248,505	184%
619 - RV Park Reserve	1,340,766	1,469,559	110%	1,284,317	1,515,811	1,388,023	108%
670 - Risk Management	5,107,351	9,323,307	183%	6,466,397	8,778,726	8,105,824	125%
675 - Health Benefits	3,815,139	6,107,998	160%	3,809,575	7,838,734	6,612,677	174%
705 - 911	8,926,080	13,393,950	150%	12,122,906	16,572,143	13,010,617	107%
999 - Other	56,596,539	109,244,434	193%	105,016,103	136,422,139	112,032,295	107%
<b>TOTAL FUND BALANCE</b>	<b>125,670,346</b>	<b>225,270,989</b>	<b>179%</b>	<b>178,087,732</b>	<b>295,990,991</b>	<b>211,789,930</b>	<b>119%</b>



# Budget to Actuals Report

## General Fund - Fund 001

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Property Taxes - Current	34,467,173	34,606,785	100%	37,400,000	36,823,452	98%	38,135,987	102%	735,987 A
Property Taxes - Prior	301,000	334,760	111%	318,000	290,574	91%	318,000	100%	-
Other General Revenues	3,591,874	4,310,996	120%	3,480,844	2,945,138	85%	3,693,834	106%	212,990
Assessor	964,246	713,767	74%	775,350	418,215	54%	775,350	100%	-
Clerk	2,298,566	1,451,801	63%	1,259,595	802,362	64%	1,259,595	100%	-
BOPTA	14,588	9,434	65%	10,200	5,526	54%	10,200	100%	-
District Attorney	1,183,942	1,089,499	92%	552,048	453,480	82%	552,048	100%	-
Tax Office	221,483	120,714	55%	136,000	92,932	68%	136,000	100%	-
Veterans	214,836	182,018	85%	261,179	97,224	37%	261,179	100%	- B
Property Management	215,000	215,058	100%	215,000	46,667	22%	215,000	100%	- C
<b>TOTAL RESOURCES</b>	<b>43,472,708</b>	<b>43,034,834</b>	<b>99%</b>	<b>44,408,216</b>	<b>41,975,570</b>	<b>95%</b>	<b>45,357,193</b>	<b>102%</b>	<b>948,977</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Assessor	5,910,478	5,399,847	91%	6,189,597	3,669,115	59%	5,740,134	93%	449,463 D
Clerk	2,432,710	2,098,659	86%	2,351,515	1,305,913	56%	2,296,076	98%	55,439 E
BOPTA	92,177	82,488	89%	97,522	49,828	51%	82,705	85%	14,817 F
District Attorney	10,979,839	10,906,691	99%	11,636,672	7,073,252	61%	11,471,525	99%	165,147 G
Medical Examiner	438,702	320,660	73%	461,224	213,529	46%	461,224	100%	-
Tax Office	905,262	834,177	92%	940,770	602,506	64%	927,241	99%	13,529 H
Veterans	809,390	758,902	94%	919,283	559,757	61%	937,290	102%	(18,007) I
Property Management	508,359	418,433	82%	539,558	322,777	60%	522,268	97%	17,290 J
Non-Departmental	2,260,456	2,237,744	99%	2,019,666	1,639,214	81%	2,175,416	108%	(155,750)
<b>TOTAL REQUIREMENTS</b>	<b>24,337,373</b>	<b>23,057,601</b>	<b>95%</b>	<b>25,155,807</b>	<b>15,435,892</b>	<b>61%</b>	<b>24,613,879</b>	<b>98%</b>	<b>541,928</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Transfers In	260,000	260,439	100%	103,790	64,856	62%	103,790	100%	- K
Transfers Out	(21,131,416)	(20,150,477)	95%	(21,067,104)	(13,937,848)	66%	(20,928,330)	99%	138,774
<b>TOTAL TRANSFERS</b>	<b>(20,871,416)</b>	<b>(19,890,038)</b>	<b>95%</b>	<b>(20,963,314)</b>	<b>(13,872,992)</b>	<b>66%</b>	<b>(20,824,540)</b>	<b>99%</b>	<b>138,774</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Beginning Fund Balance	12,975,718	13,897,135	107%	13,826,000	13,984,330	101%	13,984,330	101%	158,330
Resources over Requirements	19,135,335	19,977,233		19,252,409	26,539,678		20,743,314		1,490,905
Net Transfers - In (Out)	(20,871,416)	(19,890,038)		(20,963,314)	(13,872,992)		(20,824,540)		138,774
<b>TOTAL FUND BALANCE</b>	<b>\$ 11,239,637</b>	<b>\$ 13,984,330</b>	<b>124%</b>	<b>\$ 12,115,095</b>	<b>\$ 26,651,015</b>	<b>220%</b>	<b>\$ 13,903,104</b>	<b>115%</b>	<b>\$1,788,009</b>

- A** Current year taxes received primarily in November, February and May; actual FY23-24 TAV is 5.59% over FY22-23 vs. 4.90% budgeted.
- B** Oregon Dept. of Veteran's Affairs grant reimbursed quarterly
- C** Interfund land-sale management revenue recorded at year-end
- D** Projected Personnel savings based on FY24 average vacancy rate of 11.4%
- E** Projected Personnel savings based on FY24 average vacancy rate of 3.4%
- F** Projected Personnel based on vacancy savings to date
- G** Projected Personnel savings based on FY24 average vacancy rate of 3.4%
- H** Projected Personnel based on vacancy savings to date
- I** Projected Personnel based on overage to date
- J** Projected Personnel based on vacancy savings to date
- K** Final payment to the General Fund from Finance Reserves for ERP Implementation



# Budget to Actuals Report

## Juvenile - Fund 030

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
OYA Basic & Diversion	525,049	459,333	87%	476,611	231,249	49%	477,422	100%	811 A
ODE Juvenile Crime Prev	123,000	107,720	88%	106,829	51,174	48%	112,772	106%	5,943 B
Leases	86,000	90,228	105%	90,228	62,560	69%	90,228	100%	-
Gen Fund-Crime Prevention	89,500	89,500	100%	89,500	-	0%	89,500	100%	-
Inmate/Prisoner Housing	55,000	127,050	231%	75,000	33,840	45%	52,000	69%	(23,000) C
Miscellaneous	42,500	66,375	156%	56,500	38,765	69%	56,500	100%	-
DOC Unif Crime Fee/HB2712	49,339	50,462	102%	52,000	26,680	51%	52,000	100%	-
Interest on Investments	6,815	29,441	432%	37,500	34,353	92%	49,530	132%	12,030
OJD Court Fac/Sec SB 1065	15,000	12,420	83%	15,000	8,098	54%	13,000	87%	(2,000) D
Food Subsidy	10,000	13,116	131%	10,000	5,890	59%	10,000	100%	-
Contract Payments	8,000	5,285	66%	5,000	2,733	55%	5,000	100%	-
<b>TOTAL RESOURCES</b>	<b>1,010,203</b>	<b>1,050,931</b>	<b>104%</b>	<b>1,014,168</b>	<b>495,341</b>	<b>49%</b>	<b>1,007,952</b>	<b>99%</b>	<b>(6,216)</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Personnel Services	6,292,271	5,995,923	95%	6,852,966	4,146,909	61%	6,452,583	94%
Materials and Services	1,527,992	1,394,956	91%	1,599,048	955,460	60%	1,547,520	97%	51,528 F
Capital Outlay	108,275	106,487	98%	29,265	29,265	100%	29,265	100%	- G
<b>TOTAL REQUIREMENTS</b>	<b>7,928,538</b>	<b>7,497,365</b>	<b>95%</b>	<b>8,481,279</b>	<b>5,131,635</b>	<b>61%</b>	<b>8,029,368</b>	<b>95%</b>	<b>451,911</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In- General Funds	6,529,064	6,529,064	100%	6,798,630	4,532,408	67%	6,798,630	100%
Transfers Out	-	-	-	(45,000)	-	0%	(45,000)	100%	-
Transfers Out-Veh Reserve	(76,067)	(76,067)	100%	(75,617)	(50,408)	67%	(75,617)	100%	-
<b>TOTAL TRANSFERS</b>	<b>6,452,997</b>	<b>6,452,997</b>	<b>100%</b>	<b>6,678,013</b>	<b>4,482,000</b>	<b>67%</b>	<b>6,678,013</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	1,100,001	1,522,125	138%	1,500,000	1,528,688	102%	1,528,688	102%
Resources over Requirements	(6,918,335)	(6,446,434)	-	(7,467,111)	(4,636,294)	-	(7,021,416)	-	445,695
Net Transfers - In (Out)	6,452,997	6,452,997	-	6,678,013	4,482,000	-	6,678,013	-	-
<b>TOTAL FUND BALANCE</b>	<b>\$ 634,663</b>	<b>\$ 1,528,688</b>	<b>241%</b>	<b>\$ 710,902</b>	<b>\$ 1,374,395</b>	<b>193%</b>	<b>\$ 1,185,285</b>	<b>167%</b>	<b>\$474,383</b>

- A** Final State Grant allocation for 23-25 Biennium
- B** Final State Grant allocation for 23-25 Biennium
- C** Out of county utilization is lower than anticipated. Flucuates depending on other County needs.
- D** Based on fees and current trends.
- E** Projected Personnel savings based on FY24 average vacancy rate of 7.5%
- F** Materials and services projections based on current spending trends.
- G** Detention security upgrade project. Additional technology and upgrade requirements.





# Budget to Actuals Report

## TRT - Fund 160/170

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Room Taxes	13,580,874	12,652,871	93%	12,630,000	9,587,951	76%	12,220,000	97%	(410,000) <b>A</b>
Interest on Investments	50,408	95,656	190%	121,790	76,603	63%	111,963	92%	(9,827)
Miscellaneous	-	161		-	307		308		308
<b>TOTAL RESOURCES</b>	<b>13,631,282</b>	<b>12,748,688</b>	<b>94%</b>	<b>12,751,790</b>	<b>9,664,861</b>	<b>76%</b>	<b>12,332,271</b>	<b>97%</b>	<b>(419,519)</b>

REQUIREMENTS	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
COVA	3,675,886	3,417,576	93%	3,378,641	2,411,510	71%	3,265,692	97%	112,949 <b>B</b>
Grants & Contributions	5,600,000	4,600,000	82%	3,000,000	3,000,000	100%	3,000,000	100%	- <b>C</b>
Administrative	225,508	183,956	82%	262,395	151,477	58%	262,395	100%	-
Interfund Charges	3,574,573	3,574,573	100%	213,587	142,391	67%	213,587	100%	-
Software	47,251	46,125	98%	47,600	30,000	63%	47,600	100%	-
<b>TOTAL REQUIREMENTS</b>	<b>13,123,218</b>	<b>11,822,231</b>	<b>90%</b>	<b>6,902,223</b>	<b>5,735,378</b>	<b>83%</b>	<b>6,789,274</b>	<b>98%</b>	<b>112,949</b>

TRANSFERS	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Transfer Out - RV Park	(20,000)	(20,000)	100%	(20,000)	(13,328)	67%	(20,000)	100%	-
Transfer Out - Annual Fair	(75,000)	(75,000)	100%	(75,000)	(50,000)	67%	(75,000)	100%	-
Transfer Out - Justice Court	(263,217)	(224,696)	85%	(364,688)	(243,120)	67%	(364,688)	100%	-
Transfer Out - Health	(418,417)	(418,417)	100%	(368,417)	(245,608)	67%	(368,417)	100%	-
Transfer Out - F&E Reserve	(501,683)	(465,685)	93%	(462,119)	(308,072)	67%	(447,655)	97%	14,464 <b>D</b>
Transfer Out - General County Reserve	-	-		(723,720)	(482,480)	67%	(1,409,541)	195%	(685,821) <b>E</b>
Transfer Out - F&E	(1,091,342)	(1,019,042)	93%	(1,009,023)	(672,672)	67%	(975,271)	97%	33,752
Transfer Out - Courthouse Debt Service	-	-		(1,900,500)	(224,002)	12%	(758,000)	40%	1,142,500 <b>F</b>
Transfer Out - Sheriff	(3,651,787)	(3,651,787)	100%	(3,651,787)	(2,434,520)	67%	(3,651,787)	100%	-
<b>TOTAL TRANSFERS</b>	<b>(6,021,446)</b>	<b>(5,874,627)</b>	<b>98%</b>	<b>(8,575,254)</b>	<b>(4,673,802)</b>	<b>55%</b>	<b>(8,070,359)</b>	<b>94%</b>	<b>504,895</b>

FUND BALANCE	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Beginning Fund Balance	9,513,382	9,475,532	100%	4,527,362	4,527,362	100%	4,527,362	100%	0
Resources over Requirements	508,064	926,457		5,849,567	3,929,482		5,542,997		(306,570)
Net Transfers - In (Out)	(6,021,446)	(5,874,627)		(8,575,254)	(4,673,802)		(8,070,359)		504,895
<b>TOTAL FUND BALANCE</b>	<b>\$ 4,000,000</b>	<b>\$ 4,527,362</b>	<b>113%</b>	<b>\$ 1,801,675</b>	<b>\$ 3,783,043</b>	<b>210%</b>	<b>\$ 2,000,000</b>	<b>111%</b>	<b>\$198,325</b>

- A** Room tax revenue down 3.3% from FY23
- B** Payments to COVA based on a percent of TRT collections
- C** Includes contributions of \$2M to Sunriver Service District and \$1M to Mt. Bachelor
- D** The balance of the 1% F&E TRT is transferred to F&E reserves
- E** Includes the amount from the reduction in first year debt service and reserved for future debt payments, less adjustment for the decrease in revenues.
- F** First year debt service and bond issuance costs are lower than originally estimated during FY24 budget development.



# Budget to Actuals Report

## ARPA – Fund 200

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
State & Local Coronavirus Fiscal Recovery Funds	-	14,662,784		9,516,992	9,516,992	100%	9,516,992	100%	-
Local Assistance & Tribal Consistency	-	-		4,622,145	-	0%	-	0%	(4,622,145)
Interest on Investments	105,186	293,106	279%	319,460	171,583	54%	254,570	80%	(64,890)
<b>TOTAL RESOURCES</b>	<b>105,186</b>	<b>14,955,890</b>	<b>999%</b>	<b>14,458,597</b>	<b>9,688,575</b>	<b>67%</b>	<b>9,771,562</b>	<b>68%</b>	<b>(4,687,035)</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Services to Disproportionately Impacted Communities	15,394,824	11,733,287	76%	6,538,263	1,474,511	23%	6,538,263	100%
Administrative	4,317,328	144,531	3%	1,719,694	92,437	5%	1,635,245	95%	84,449
Infrastructure	1,634,710	860,474	53%	766,410	111,905	15%	766,410	100%	-
Public Health	882,922	997,337	113%	560,926	285,691	51%	560,926	100%	-
Negative Economic Impacts	899,577	927,155	103%	252,363	150,000	59%	252,363	100%	-
<b>TOTAL REQUIREMENTS</b>	<b>23,129,361</b>	<b>14,662,784</b>	<b>63%</b>	<b>9,837,656</b>	<b>2,114,544</b>	<b>21%</b>	<b>9,753,207</b>	<b>99%</b>	<b>84,449</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers Out	-	-		(5,022,145)	(400,000)	8%	(400,000)	8%
<b>TOTAL TRANSFERS</b>	<b>-</b>	<b>-</b>		<b>(5,022,145)</b>	<b>(400,000)</b>	<b>8%</b>	<b>(400,000)</b>	<b>8%</b>	<b>4,622,145</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	23,024,175	108,098	0%	401,204	401,204	100%	401,204	100%
Resources over Requirements	(23,024,175)	293,106		4,620,941	7,574,031		18,355		(4,602,586)
Net Transfers - In (Out)	-	-		(5,022,145)	(400,000)		(400,000)		4,622,145
<b>TOTAL FUND BALANCE</b>	<b>-</b>	<b>\$ 401,204</b>	<b>999%</b>	<b>-</b>	<b>\$ 7,575,235</b>	<b>999%</b>	<b>\$ 19,559</b>	<b>999%</b>	<b>\$19,559</b>



# Budget to Actuals Report

## Justice Court - Fund 220

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Court Fines & Fees	525,000	517,489	99%	525,000	332,808	63%	525,000	100%	-
Interest on Investments	32	513	999%	540	1,098	203%	1,550	287%	1,010
<b>TOTAL RESOURCES</b>	<b>525,032</b>	<b>518,001</b>	<b>99%</b>	<b>525,540</b>	<b>333,906</b>	<b>64%</b>	<b>526,550</b>	<b>100%</b>	<b>1,010</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Personnel Services	604,648	592,149	98%	651,767	437,719	67%	644,090	99%
Materials and Services	161,535	150,549	93%	170,603	116,158	68%	170,603	100%	-
<b>TOTAL REQUIREMENTS</b>	<b>766,183</b>	<b>742,697</b>	<b>97%</b>	<b>822,370</b>	<b>553,877</b>	<b>67%</b>	<b>814,693</b>	<b>99%</b>	<b>7,677</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In - TRT	263,217	224,696	85%	364,688	243,120	67%	364,688	100%
<b>TOTAL TRANSFERS</b>	<b>263,217</b>	<b>224,696</b>	<b>85%</b>	<b>364,688</b>	<b>243,120</b>	<b>67%</b>	<b>364,688</b>	<b>100%</b>	<b>-</b>

Resources over Requirements	(241,151)	(224,696)		(296,830)	(219,970)		(288,143)		8,687
Net Transfers - In (Out)	263,217	224,696		364,688	243,120		364,688		-
<b>TOTAL</b>	<b>\$ 22,066</b>	<b>-</b>	<b>0%</b>	<b>\$ 67,858</b>	<b>\$ 23,150</b>	<b>34%</b>	<b>\$ 76,545</b>	<b>113%</b>	<b>\$ 8,687</b>

**A** One time yearly software maintenance fee paid in July for entire fiscal year



# Budget to Actuals Report

## Sheriff's Office - Fund 255

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
LED #1 Property Tax Current	30,282,049	30,424,303	100%	38,006,062	36,734,903	97%	38,006,062	100%	- A
LED #2 Property Tax Current	13,400,541	13,405,210	100%	15,189,654	14,681,339	97%	15,189,654	100%	- B
Sheriff's Office Revenues	5,307,630	6,093,977	115%	4,583,572	2,935,520	64%	4,753,032	104%	169,460
LED #1 Property Tax Prior	330,000	277,442	84%	330,000	249,568	76%	330,000	100%	-
LED #1 Interest	89,119	283,971	319%	264,000	323,452	123%	465,020	176%	201,020
LED #2 Property Tax Prior	145,000	114,469	79%	120,000	106,841	89%	120,000	100%	-
LED #2 Interest	22,716	73,353	323%	65,000	85,474	131%	120,150	185%	55,150
<b>TOTAL RESOURCES</b>	<b>49,577,055</b>	<b>50,672,726</b>	<b>102%</b>	<b>58,558,288</b>	<b>55,117,097</b>	<b>94%</b>	<b>58,983,918</b>	<b>101%</b>	<b>425,630</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Digital Forensics	808,610	856,836	106%	1,221,145	835,434	68%	1,332,207	109%
Concealed Handgun Licenses	335,044	345,454	103%	624,277	276,617	44%	455,522	73%	168,755
Rickard Ranch	264,871	278,671	105%	334,232	203,433	61%	367,120	110%	(32,888)
Sheriff's Services	5,863,885	5,196,628	89%	5,771,949	3,445,241	60%	5,377,882	93%	394,067
Civil/Special Units	1,168,300	1,102,770	94%	1,019,021	734,179	72%	1,107,451	109%	(88,430)
Automotive/Communications	3,765,888	3,635,006	97%	4,574,918	2,631,928	58%	4,491,092	98%	83,826
Detective	3,583,825	4,105,995	115%	4,773,538	2,768,084	58%	4,348,397	91%	425,141
Patrol	14,880,315	14,858,735	100%	16,270,641	9,540,578	59%	16,045,693	99%	224,948
Records	904,493	687,442	76%	855,590	451,763	53%	724,960	85%	130,630
Adult Jail	22,809,320	20,842,708	91%	23,784,474	13,271,578	56%	21,429,822	90%	2,354,652
Court Security	424,769	598,098	141%	600,590	379,726	63%	582,556	97%	18,034
Emergency Services	829,997	545,477	66%	808,931	437,412	54%	663,495	82%	145,436
Special Services	2,047,792	2,374,496	116%	2,779,458	1,836,916	66%	2,788,111	100%	(8,653)
Training	1,907,588	1,986,740	104%	1,537,498	793,508	52%	1,355,455	88%	182,043
Other Law Enforcement	820,836	958,658	117%	634,835	595,551	94%	1,090,531	172%	(455,696)
Non - Departmental	-	-	0%	50,000	-	0%	50,000	100%	-
<b>TOTAL REQUIREMENTS</b>	<b>60,415,533</b>	<b>58,373,715</b>	<b>97%</b>	<b>65,641,097</b>	<b>38,201,950</b>	<b>58%</b>	<b>62,210,294</b>	<b>95%</b>	<b>3,430,803</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfer In - TRT	3,651,787	3,651,787	100%	3,651,787	2,434,520	67%	3,651,787	100%
Transfer In - General Fund	70,000	70,000	100%	-	-	-	-	-	-
Transfers Out	-	-	-	(6,500)	-	0%	(6,500)	100%	-
Transfers Out - Debt Service	(273,200)	(272,678)	100%	(267,700)	(161,273)	60%	(267,700)	100%	-
<b>TOTAL TRANSFERS</b>	<b>3,448,587</b>	<b>3,449,109</b>	<b>100%</b>	<b>3,377,587</b>	<b>2,273,247</b>	<b>67%</b>	<b>3,377,587</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	14,414,541	15,253,094	106%	11,001,214	11,001,214	100%	11,001,214	100%
Resources over Requirements	(10,838,478)	(7,700,989)	-	(7,082,809)	16,915,147	-	(3,226,376)	-	3,856,433
Net Transfers - In (Out)	3,448,587	3,449,109	-	3,377,587	2,273,247	-	3,377,587	-	-
<b>TOTAL FUND BALANCE</b>	<b>\$ 7,024,650</b>	<b>\$ 11,001,214</b>	<b>157%</b>	<b>\$ 7,295,992</b>	<b>\$ 30,189,608</b>	<b>414%</b>	<b>\$ 11,152,425</b>	<b>153%</b>	<b>\$ 3,856,433</b>

- A** Current year taxes received primarily in November, February and May
- B** Current year taxes received primarily in November, February and May



# Budget to Actuals Report

## Health Services - Fund 274

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
State Grant	22,223,536	18,578,578	84%	23,707,980	16,050,965	68%	20,911,647	88%	(2,796,333)
OHP Capitation	12,882,624	12,088,181	94%	16,494,114	11,864,494	72%	17,416,057	106%	921,943
State Miscellaneous	8,901,719	7,751,386	87%	5,521,715	3,664,911	66%	5,164,038	94%	(357,677)
OHP Fee for Service	3,232,620	5,287,409	164%	4,947,581	3,470,307	70%	4,832,777	98%	(114,804)
Local Grants	2,332,031	2,054,936	88%	1,567,894	2,191,945	140%	2,111,367	135%	543,473
Environmental Health Fees	1,238,499	1,335,280	108%	1,478,906	1,291,736	87%	1,517,060	103%	38,154
Federal Grants	2,615,634	2,390,105	91%	1,440,560	618,671	43%	1,287,923	89%	(152,637)
Patient Fees	615,644	748,534	122%	1,087,790	564,341	52%	835,854	77%	(251,936)
Other	1,169,317	1,976,339	169%	1,061,371	1,479,084	139%	1,957,697	184%	896,326
State - Medicaid/Medicare	807,530	1,197,300	148%	1,034,491	669,988	65%	981,083	95%	(53,408)
Medicaid	430,863	746,146	173%	431,000	490,528	114%	753,293	175%	322,293
Vital Records	300,000	354,158	118%	315,000	211,757	67%	318,838	101%	3,838
Interest on Investments	97,750	390,781	400%	262,007	455,906	174%	651,590	249%	389,583
State - Medicare	337,614	234,401	69%	209,500	155,390	74%	232,135	111%	22,635
Liquor Revenue	177,574	161,412	91%	177,574	102,805	58%	177,574	100%	-
State Shared- Family Planning	125,000	152,985	122%	158,000	49,530	31%	77,637	49%	(80,363)
Interfund Contract- Gen Fund	127,000	127,000	100%	127,000	-	0%	127,000	100%	-
Revenue Not Assigned	-	-	-	-	-	-	-	-	-
Divorce Filing Fees	173,030	63,178	37%	-	-	-	-	-	-
<b>TOTAL RESOURCES</b>	<b>57,787,985</b>	<b>55,638,108</b>	<b>96%</b>	<b>60,022,483</b>	<b>43,332,357</b>	<b>72%</b>	<b>59,353,570</b>	<b>99%</b>	<b>(668,913)</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Administration Allocation	-	-	999%	-	-	-	(1)	-	1
Personnel Services	50,658,752	48,187,764	95%	50,537,530	32,462,275	64%	51,471,017	102%	(933,487)
Materials and Services	19,393,800	14,220,207	73%	21,101,414	9,099,292	43%	16,329,819	77%	4,771,595
Capital Outlay	926,575	504,137	54%	347,500	98,768	28%	246,870	71%	100,630
<b>TOTAL REQUIREMENTS</b>	<b>70,979,127</b>	<b>62,912,108</b>	<b>89%</b>	<b>71,986,444</b>	<b>41,660,335</b>	<b>58%</b>	<b>68,047,705</b>	<b>95%</b>	<b>3,938,739</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Transfers In- General Fund	6,608,245	5,648,912	85%	6,780,140	4,520,016	67%	6,694,620	99%	(85,520)
Transfers In- OHP Mental Health	1,473,586	345,442	23%	2,210,573	160,933	7%	995,931	45%	(1,214,642)
Transfers In - TRT	418,417	418,417	100%	368,417	245,608	67%	368,417	100%	-
Transfers Out	(492,306)	(562,306)	114%	(1,332,674)	(762,861)	57%	(912,923)	69%	419,751
<b>TOTAL TRANSFERS</b>	<b>8,007,942</b>	<b>5,850,465</b>	<b>73%</b>	<b>8,026,456</b>	<b>4,163,697</b>	<b>52%</b>	<b>7,146,045</b>	<b>89%</b>	<b>(880,411)</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Beginning Fund Balance	11,228,719	13,942,649	124%	11,417,516	12,519,113	110%	12,519,114	110%	1,101,598
Resources over Requirements	(13,191,142)	(7,274,000)	-	(11,963,961)	1,672,023	-	(8,694,135)	-	3,269,826
Net Transfers - In (Out)	8,007,942	5,850,465	73%	8,026,456	4,163,697	52%	7,146,045	89%	(880,411)
<b>TOTAL FUND BALANCE</b>	<b>\$ 6,045,519</b>	<b>\$ 12,519,113</b>	<b>207%</b>	<b>\$ 7,480,011</b>	<b>\$ 18,354,833</b>	<b>245%</b>	<b>\$ 10,971,024</b>	<b>147%</b>	<b>\$ 3,491,013</b>



# Budget to Actuals Report

## Health Services - Admin - Fund 274

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
OHP Capitation	367,074	367,074	100%	435,349	314,736	72%	435,349	100%	-
Interest on Investments	97,750	390,781	400%	262,007	455,906	174%	651,590	249%	389,583
State Grant	379,180	142,133	37%	160,000	207,433	130%	160,000	100%	- <b>A</b>
Other	160,495	33,725	21%	9,000	140,215	999%	154,313	999%	145,313 <b>B</b>
Federal Grants	454,405	592,179	130%	-	-	-	-	-	-
<b>TOTAL RESOURCES</b>	<b>1,458,904</b>	<b>1,525,892</b>	<b>105%</b>	<b>866,356</b>	<b>1,118,291</b>	<b>129%</b>	<b>1,401,252</b>	<b>162%</b>	<b>534,896</b>

REQUIREMENTS	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Personnel Services	6,738,820	6,093,176	90%	6,519,513	4,142,616	64%	6,572,760	101%	(53,247) <b>C</b>
Materials and Services	6,998,683	6,732,321	96%	7,546,752	4,903,410	65%	7,574,093	100%	(27,341)
Capital Outlay	12,000	-	0%	43,750	-	0%	43,750	100%	-
Administration Allocation	(11,228,846)	(11,228,846)	100%	(12,608,709)	-	0%	(12,614,368)	100%	5,659
<b>TOTAL REQUIREMENTS</b>	<b>2,520,656</b>	<b>1,596,650</b>	<b>63%</b>	<b>1,501,306</b>	<b>9,046,026</b>	<b>603%</b>	<b>1,576,235</b>	<b>105%</b>	<b>(74,929)</b>

TRANSFERS	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Transfers In- OHP Mental Health	80,771	80,771	100%	81,250	-	0%	81,250	100%	-
Transfers Out	(230,635)	(230,635)	100%	(300,174)	(200,112)	67%	(300,174)	100%	-
<b>TOTAL TRANSFERS</b>	<b>(149,864)</b>	<b>(149,864)</b>	<b>100%</b>	<b>(218,924)</b>	<b>(200,112)</b>	<b>91%</b>	<b>(218,924)</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Beginning Fund Balance	3,884,332	4,007,465	103%	3,665,544	3,786,843	103%	3,786,844	103%	121,300
Resources over Requirements	(1,061,752)	(70,758)		(634,950)	(7,927,735)		(174,983)		459,967
Net Transfers - In (Out)	(149,864)	(149,864)		(218,924)	(200,112)		(218,924)		-
<b>TOTAL FUND BALANCE</b>	<b>\$ 2,672,716</b>	<b>\$ 3,786,843</b>	<b>142%</b>	<b>\$ 2,811,670</b>	<b>(\$ 4,341,004)</b>	<b>-154%</b>	<b>\$ 3,392,937</b>	<b>121%</b>	<b>\$581,267</b>

- A** Projection includes adjustment for anticipated unearned revenue. Amounts will be finalized at fiscal year-end.
- B** Includes carryforward of \$125k in unspent FY23 PacificSource Behavioral Health Workforce Diversity Grant.
- C** Personnel projections over budget due to increased health and benefit charges. Budget adjustment to move contingency to personnel services expected at fiscal year-end. Projections include anticipated 3% vacancy.



# Budget to Actuals Report

## Health Services - Behavioral Health - Fund 274

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
State Grant	15,718,843	12,660,784	81%	17,967,689	12,546,981	70%	14,670,922	82%	(3,296,767) A
OHP Capitation	12,515,550	11,721,107	94%	16,058,765	11,549,757	72%	16,886,708	105%	827,943 B
OHP Fee for Service	3,214,360	5,256,164	164%	4,927,331	3,450,945	70%	4,807,813	98%	(119,518)
State Miscellaneous	8,027,373	7,063,393	88%	4,653,004	3,508,916	75%	4,641,114	100%	(11,890) C
Local Grants	1,475,139	1,262,473	86%	1,348,943	1,407,017	104%	1,462,019	108%	113,076 D
Federal Grants	2,017,169	1,636,693	81%	1,285,560	566,349	44%	1,164,079	91%	(121,481) E
Other	719,670	730,175	101%	631,245	472,513	75%	684,934	109%	53,689
Patient Fees	519,344	607,872	117%	448,500	418,719	93%	621,498	139%	172,998
Medicaid	430,863	746,146	173%	431,000	490,528	114%	753,293	175%	322,293 F
State - Medicare	337,614	234,401	69%	209,500	155,390	74%	232,135	111%	22,635
Liquor Revenue	177,574	161,412	91%	177,574	102,805	58%	177,574	100%	-
Interfund Contract- Gen Fund	127,000	127,000	100%	127,000	-	0%	127,000	100%	-
Revenue Not Assigned	-	-	-	-	-	-	-	-	-
Divorce Filing Fees	173,030	63,178	37%	-	-	-	-	-	-
<b>TOTAL RESOURCES</b>	<b>45,453,529</b>	<b>42,270,797</b>	<b>93%</b>	<b>48,266,111</b>	<b>34,669,921</b>	<b>72%</b>	<b>46,229,089</b>	<b>96%</b>	<b>(2,037,022)</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Administration Allocation	8,265,132	8,265,132	100%	9,521,531	-	0%	9,527,189	100%
Personnel Services	32,453,031	31,307,705	96%	32,139,452	20,736,632	65%	32,984,253	103%	(844,801) G
Materials and Services	9,948,652	5,531,099	56%	11,275,204	3,177,871	28%	6,506,038	58%	4,769,166 H
Capital Outlay	497,443	312,691	63%	160,250	56,392	35%	91,392	57%	68,858
<b>TOTAL REQUIREMENTS</b>	<b>51,164,258</b>	<b>45,416,627</b>	<b>89%</b>	<b>53,096,437</b>	<b>23,970,894</b>	<b>45%</b>	<b>49,108,872</b>	<b>92%</b>	<b>3,987,565</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In- General Fund	2,231,439	1,440,767	65%	2,231,439	1,487,584	67%	2,145,919	96%
Transfers In- OHP Mental Health	1,392,815	264,671	19%	1,809,358	-	0%	594,716	33%	(1,214,642) I
Transfers Out	(152,921)	(196,921)	129%	(481,000)	(562,749)	117%	(562,749)	117%	(81,749) J
<b>TOTAL TRANSFERS</b>	<b>3,471,333</b>	<b>1,508,517</b>	<b>43%</b>	<b>3,559,797</b>	<b>924,835</b>	<b>26%</b>	<b>2,177,886</b>	<b>61%</b>	<b>(1,381,911)</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	4,788,795	6,317,144	132%	3,989,589	4,679,830	117%	4,679,830	117%
Resources over Requirements	(5,710,729)	(3,145,830)	-	(4,830,326)	10,699,026	-	(2,879,783)	-	1,950,543
Net Transfers - In (Out)	3,471,333	1,508,517	-	3,559,797	924,835	-	2,177,886	-	(1,381,911)
<b>TOTAL FUND BALANCE</b>	<b>\$ 2,549,399</b>	<b>\$ 4,679,830</b>	<b>184%</b>	<b>\$ 2,719,060</b>	<b>\$ 16,303,692</b>	<b>600%</b>	<b>\$ 3,977,933</b>	<b>146%</b>	<b>\$ 1,258,873</b>

- A** Projections include estimated adjustments for anticipated unearned revenue. Exact amounts will be finalized at fiscal year-end.
- B** Capitation coming in higher than budgeted. OHP enrollment redetermination budgeted at 13%, and revised estimates projected to be 8.9%.
- C** Projection less than budget primarily related to lower I/DD match anticipated than originally budgeted, and includes \$188K for new OHA Community Navigator Pilot program. Budget resolution coming to the Board end of March. Projections include estimated adjustments for anticipated unearned revenue. Exact amounts will be finalized at fiscal year-end.
- D** Additional funds received for COHC QIM (\$387K). Grant funds will be reconciled at end of year, and projections include estimated adjustments for anticipated unearned revenue, including: COHC Older Adults projected under budget by (\$211K) and City of Bend MCAT (\$68K). Exact amounts will be finalized at fiscal year-end.
- E** Projections include estimated adjustments for anticipated unearned revenue. Exact amounts will be finalized at fiscal year-end.
- F** CCBHC rebased rates increasing revenue above budgeted amounts.
- G** Personnel projections over budget due to increased health and benefit charges, lower than budgeted vacancy rates, and workforce stipends. It also includes 2 additional FTE with new OHA Community Navigator Pilot not yet budgeted; resolution forthcoming at end of March. Budget adjustment to move contingency to personnel services expected at fiscal year-end.
- H** \$3.8 million originally budgeted for HB 5502 BH Housing Grant removed for FY24.
- I** Only \$165K of originally-budgeted \$1.4M for La Pine Community Health Clinic anticipated in FY24. Remainder expected to be incurred during FY25.
- J** Projections over budget includes \$150K transfer for expenses of North County originally budgeted in FY23.



# Budget to Actuals Report

## Health Services - Public Health - Fund 274

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
State Grant	6,125,513	5,775,661	94%	5,580,291	3,296,551	59%	6,080,725	109%	500,434 A
Environmental Health Fees	1,238,499	1,335,280	108%	1,478,906	1,291,736	87%	1,517,060	103%	38,154
State - Medicaid/Medicare	807,530	1,197,300	148%	1,034,491	669,988	65%	981,083	95%	(53,408) B
State Miscellaneous	874,346	687,993	79%	868,711	155,995	18%	522,924	60%	(345,787) C
Patient Fees	96,300	140,662	146%	639,290	145,622	23%	214,356	34%	(424,934) D
Other	289,152	1,212,439	419%	421,126	866,355	206%	1,118,450	266%	697,324 E
Vital Records	300,000	354,158	118%	315,000	211,757	67%	318,838	101%	3,838
Local Grants	856,892	792,463	92%	218,951	784,928	358%	649,348	297%	430,397 F
State Shared- Family Planning	125,000	152,985	122%	158,000	49,530	31%	77,637	49%	(80,363)
Federal Grants	144,060	161,233	112%	155,000	52,322	34%	123,844	80%	(31,156)
OHP Fee for Service	18,260	31,245	171%	20,250	19,362	96%	24,964	123%	4,714
OHP Capitation	-	-	-	-	-	-	94,000	-	94,000
<b>TOTAL RESOURCES</b>	<b>10,875,552</b>	<b>11,841,419</b>	<b>109%</b>	<b>10,890,016</b>	<b>7,544,146</b>	<b>69%</b>	<b>11,723,229</b>	<b>108%</b>	<b>833,213</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Administration Allocation	2,963,714	2,963,714	100%	3,087,178	-	0%	3,087,178	100%	-
Personnel Services	11,466,901	10,786,883	94%	11,878,565	7,583,027	64%	11,914,004	100%	(35,439) G
Materials and Services	2,446,466	1,956,788	80%	2,279,458	1,018,012	45%	2,249,688	99%	29,770
Capital Outlay	417,132	191,446	46%	143,500	42,376	30%	111,728	78%	31,772
<b>TOTAL REQUIREMENTS</b>	<b>17,294,213</b>	<b>15,898,830</b>	<b>92%</b>	<b>17,388,701</b>	<b>8,643,414</b>	<b>50%</b>	<b>17,362,598</b>	<b>100%</b>	<b>26,103</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Transfers In- General Fund	4,376,806	4,208,145	96%	4,548,701	3,032,432	67%	4,548,701	100%	-
Transfers In - TRT	418,417	418,417	100%	368,417	245,608	67%	368,417	100%	-
Transfers In- OHP Mental Health	-	-	-	319,965	160,933	50%	319,965	100%	-
Transfers Out	(108,750)	(134,750)	124%	(551,500)	-	0%	(50,000)	9%	501,500 H
<b>TOTAL TRANSFERS</b>	<b>4,686,473</b>	<b>4,491,812</b>	<b>96%</b>	<b>4,685,583</b>	<b>3,438,973</b>	<b>73%</b>	<b>5,187,083</b>	<b>111%</b>	<b>501,500</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Beginning Fund Balance	2,555,592	3,618,039	142%	3,762,383	4,052,440	108%	4,052,440	108%	290,057
Resources over Requirements	(6,418,661)	(4,057,412)	-	(6,498,685)	(1,099,268)	-	(5,639,369)	-	859,316
Net Transfers - In (Out)	4,686,473	4,491,812	-	4,685,583	3,438,973	-	5,187,083	-	501,500
<b>TOTAL FUND BALANCE</b>	<b>\$ 823,404</b>	<b>\$ 4,052,440</b>	<b>492%</b>	<b>\$ 1,949,281</b>	<b>\$ 6,392,145</b>	<b>328%</b>	<b>\$ 3,600,154</b>	<b>185%</b>	<b>\$ 1,650,873</b>

- A** Projections over budget primarily related to carryforward of OHA COVID funds to be expended by June 2024. Projections include estimated adjustments for anticipated unearned revenue. Exact amounts will be finalized at fiscal year-end.
- B** Medicaid trending lower than budgeted.
- C** EISO Grant (\$369K) budgeted as state miscellaneous, but converted to a program element (PE73). Funding coming through state grant line item.
- D** Patient Insurance Fees trending lower than budgeted, primarily in the new Family Connects Oregon program.
- E** Projections include Opioid Settlement Payments (\$679K).
- F** Includes funds from Central Oregon Health Council quality incentive metrics (\$267K). Projection includes adjustment for anticipated unearned revenue. Amounts will be finalized at fiscal year-end.
- G** Personnel projections over budget due to increased health and benefit charges. Budget adjustment to move contingency to personnel services expected at fiscal year-end. Projections include anticipated 3% vacancy."
- H** Courtney remodel project delayed into FY25 or FY26.





# Budget to Actuals Report

## Community Development - Fund 295

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Admin - Operations	153,445	154,886	101%	157,300	88,674	56%	147,200	94%	(10,100)
Code Compliance	1,171,592	915,867	78%	1,124,181	527,412	47%	803,452	71%	(320,729) <b>A</b>
Building Safety	4,821,160	4,118,192	85%	3,991,388	2,153,598	54%	3,363,742	84%	(627,646) <b>A</b>
Electrical	1,022,005	769,054	75%	902,175	506,223	56%	756,975	84%	(145,200) <b>A</b>
Onsite Wastewater	1,017,678	718,263	71%	923,880	599,310	65%	868,140	94%	(55,740) <b>A</b>
Current Planning	2,425,334	1,966,872	81%	2,304,562	1,041,285	45%	1,501,615	65%	(802,947) <b>A</b>
Long Range Planning	1,064,305	812,752	76%	1,057,354	482,029	46%	728,408	69%	(328,946) <b>A</b>
<b>TOTAL RESOURCES</b>	<b>11,675,519</b>	<b>9,455,886</b>	<b>81%</b>	<b>10,460,840</b>	<b>5,398,531</b>	<b>52%</b>	<b>8,169,532</b>	<b>78%</b>	<b>(2,291,308)</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Admin - Operations	3,432,980	3,085,363	90%	3,241,288	1,956,784	60%	3,009,751	93%
Code Compliance	805,614	714,049	89%	743,931	407,505	55%	656,912	88%	87,019 <b>B</b>
Building Safety	2,538,721	1,866,742	74%	2,088,542	1,177,319	56%	1,942,934	93%	145,608 <b>B</b>
Electrical	641,837	538,383	84%	583,718	355,922	61%	566,330	97%	17,388 <b>B</b>
Onsite Wastewater	753,369	754,829	100%	865,670	504,301	58%	743,715	86%	121,955 <b>B</b>
Current Planning	2,062,044	1,613,571	78%	1,857,735	951,301	51%	1,520,001	82%	337,734 <b>B</b>
Long Range Planning	998,739	893,682	89%	888,677	482,884	54%	725,405	82%	163,272 <b>B</b>
<b>TOTAL REQUIREMENTS</b>	<b>11,233,304</b>	<b>9,466,620</b>	<b>84%</b>	<b>10,269,561</b>	<b>5,836,017</b>	<b>57%</b>	<b>9,165,048</b>	<b>89%</b>	<b>1,104,513</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In - CDD Operating Fund	-	-	-	510,105	162,230	32%	571,971	112%
Transfers in - General Fund	160,000	139,916	87%	100,000	32,228	32%	100,000	100%	- <b>C</b>
Transfers In - CDD Electrical Reserve	-	108,670	-	86,721	56,952	66%	126,799	146%	40,078
Transfers Out	(112,619)	(112,619)	100%	(107,544)	(71,672)	67%	(107,544)	100%	-
Transfers Out - CDD Reserve	(958,966)	(971,472)	101%	(122,752)	(65,298)	53%	(18,427)	15%	104,325 <b>D</b>
<b>TOTAL TRANSFERS</b>	<b>(911,585)</b>	<b>(835,505)</b>	<b>92%</b>	<b>466,530</b>	<b>114,440</b>	<b>25%</b>	<b>672,799</b>	<b>144%</b>	<b>206,269</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	2,096,504	2,168,956	103%	1,317,921	1,322,717	100%	1,322,717	100%
Resources over Requirements	442,215	(10,734)	-	191,279	(437,485)	-	(995,516)	-	(1,186,795)
Net Transfers - In (Out)	(911,585)	(835,505)	-	466,530	114,440	-	672,799	-	206,269
<b>TOTAL FUND BALANCE</b>	<b>\$ 1,627,134</b>	<b>\$ 1,322,717</b>	<b>81%</b>	<b>\$ 1,975,730</b>	<b>\$ 999,672</b>	<b>51%</b>	<b>\$ 1,000,000</b>	<b>51%</b>	<b>(\$975,730)</b>

- A** YTD revenue collection is lower than anticipated due to reduced permitting volumes
- B** Projections reflect unfilled positions and increased health benefits costs
- C** Quarterly transfer for hearings officer actual cost of service
- D** Transfer to reserves per ORS 455.210 and ORS 479.845



# Budget to Actuals Report

## Road - Fund 325

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Motor Vehicle Revenue	19,483,147	20,563,619	106%	20,648,483	14,303,795	69%	20,648,483	100%	-
Federal - PILT Payment	2,200,000	2,239,616	102%	2,240,000	2,394,054	107%	2,394,054	107%	154,054 <b>A</b>
Other Inter-fund Services	1,311,901	1,232,001	94%	1,450,015	435,652	30%	1,410,112	97%	(39,903)
Cities-Bend/Red/Sis/La Pine	403,731	969,028	240%	763,171	306,724	40%	1,002,906	131%	239,735
Federal Reimbursements	-	7,641		689,703	342,290	50%	367,290	53%	(322,413)
Sale of Equip & Material	426,000	385,036	90%	614,500	324,850	53%	476,000	77%	(138,500)
Interest on Investments	54,172	105,203	194%	138,031	108,129	78%	130,060	94%	(7,971)
Miscellaneous	77,610	65,385	84%	73,808	34,486	47%	46,948	64%	(26,860)
Mineral Lease Royalties	50,000	105,306	211%	50,000	13,193	26%	50,000	100%	-
Assessment Payments (P&I)	-	5,175		6,000	10,756	179%	18,000	300%	12,000
Forest Receipts	882,502	-	0%	-	-		-		-
State Miscellaneous	-	20,000		-	-		-		-
<b>TOTAL RESOURCES</b>	<b>24,889,063</b>	<b>25,698,009</b>	<b>103%</b>	<b>26,673,711</b>	<b>18,273,928</b>	<b>69%</b>	<b>26,543,853</b>	<b>100%</b>	<b>(129,858)</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Personnel Services	7,802,271	7,346,958	94%	8,406,468	5,332,371	63%	7,961,103	95%
Materials and Services	8,246,700	6,385,588	77%	8,600,033	3,860,366	45%	7,913,168	92%	686,865
Capital Outlay	140,025	90,004	64%	118,260	66,845	57%	66,845	57%	51,415
<b>TOTAL REQUIREMENTS</b>	<b>16,188,996</b>	<b>13,822,550</b>	<b>85%</b>	<b>17,124,761</b>	<b>9,259,582</b>	<b>54%</b>	<b>15,941,116</b>	<b>93%</b>	<b>1,183,645</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers Out	(12,330,136)	(12,330,136)	100%	(12,700,000)	(7,700,000)	61%	(12,700,000)	100%
<b>TOTAL TRANSFERS</b>	<b>(12,330,136)</b>	<b>(12,330,136)</b>	<b>100%</b>	<b>(12,700,000)</b>	<b>(7,700,000)</b>	<b>61%</b>	<b>(12,700,000)</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	5,892,967	7,806,356	132%	5,521,251	7,351,679	133%	7,351,679	133%
Resources over Requirements	8,700,067	11,875,459		9,548,950	9,014,346		10,602,737		1,053,787
Net Transfers - In (Out)	(12,330,136)	(12,330,136)		(12,700,000)	(7,700,000)		(12,700,000)		-
<b>TOTAL FUND BALANCE</b>	<b>\$ 2,262,898</b>	<b>\$ 7,351,679</b>	<b>325%</b>	<b>\$ 2,370,201</b>	<b>\$ 8,666,025</b>	<b>366%</b>	<b>\$ 5,254,416</b>	<b>222%</b>	<b>\$2,884,215</b>

**A** Actual payment higher than budget

**B** Projected Personnel savings based on FY24 average vacancy rate of 8.3%



# Budget to Actuals Report

## Adult P&P - Fund 355

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
DOC Grant in Aid SB 1145	4,734,453	4,734,453	100%	4,116,464	3,095,162	75%	4,143,986	101%	27,522
CJC Justice Reinvestment	892,038	943,172	106%	943,172	-	0%	1,167,810	124%	224,638
DOC Measure 57	244,606	271,606	111%	256,815	-	0%	259,307	101%	2,492
Interest on Investments	18,151	63,625	351%	75,230	54,527	72%	80,750	107%	5,520
Interfund- Sheriff	50,000	50,000	100%	50,000	33,333	67%	50,000	100%	-
Gen Fund/Crime Prevention	50,000	50,000	100%	50,000	-	0%	50,000	100%	-
State Miscellaneous	123,453	179,530	145%	22,607	27,039	120%	122,607	542%	100,000
Oregon BOPPPS	20,318	-	0%	20,318	-	0%	20,318	100%	-
Miscellaneous	500	2,099	420%	500	81	16%	500	100%	-
Electronic Monitoring Fee	500	889	178%	500	258	52%	500	100%	-
<b>TOTAL RESOURCES</b>	<b>6,134,018</b>	<b>6,295,372</b>	<b>103%</b>	<b>5,535,606</b>	<b>3,210,399</b>	<b>58%</b>	<b>5,895,778</b>	<b>107%</b>	<b>360,172</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Personnel Services	5,683,822	5,042,967	89%	5,907,511	3,391,458	57%	5,178,183	88%
Materials and Services	1,883,614	1,739,432	92%	1,668,521	1,029,968	62%	1,715,000	103%	(46,479)
Capital Outlay	8,475	8,475	100%	-	-	-	-	-	-
<b>TOTAL REQUIREMENTS</b>	<b>7,575,910</b>	<b>6,790,874</b>	<b>90%</b>	<b>7,576,032</b>	<b>4,421,426</b>	<b>58%</b>	<b>6,893,183</b>	<b>91%</b>	<b>682,849</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In- General Funds	536,369	536,369	100%	536,369	357,576	67%	536,369	100%
Transfers In- Health Services	-	-	-	50,000	-	0%	50,000	100%	-
Transfers Out	(199,560)	(199,560)	100%	-	-	-	-	-	-
Transfer to Vehicle Maint	(69,277)	(69,277)	100%	(75,419)	(50,272)	67%	(75,419)	100%	-
<b>TOTAL TRANSFERS</b>	<b>267,532</b>	<b>267,532</b>	<b>100%</b>	<b>510,950</b>	<b>307,304</b>	<b>60%</b>	<b>510,950</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	3,100,000	3,238,905	104%	3,000,000	3,010,934	100%	3,010,934	100%
Resources over Requirements	(1,441,892)	(495,502)	-	(2,040,426)	(1,211,027)	-	(997,405)	-	1,043,021
Net Transfers - In (Out)	267,532	267,532	100%	510,950	307,304	60%	510,950	100%	-
<b>TOTAL FUND BALANCE</b>	<b>\$ 1,925,640</b>	<b>\$ 3,010,934</b>	<b>156%</b>	<b>\$ 1,470,524</b>	<b>\$ 2,107,212</b>	<b>143%</b>	<b>\$ 2,524,479</b>	<b>172%</b>	<b>\$1,053,955</b>

- A** Final State Grant allocation for 23-25 Biennium
- B** Final State Grant allocation for 23-25 Biennium. We received competitive grant funds on top of formula allocation.
- C** Final State Grant allocation for 23-25 Biennium
- D** Final State Grant allocation for 23-25 Biennium. We received grant funding for house through contracted provider.
- E** Projected Personnel savings based on FY24 average vacancy rate of 15.5%
- F** Materials and services projections based on current spending trends.



# Budget to Actuals Report

## Road CIP - Fund 465

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
State Miscellaneous	1,818,500	127,458	7%	1,704,116	1,778,246	104%	2,374,169	139%	670,053
Interest on Investments	124,563	337,583	271%	475,310	411,940	87%	661,020	139%	185,710 A
Miscellaneous	-	317,508		-	19,241		19,241		19,241 A
<b>TOTAL RESOURCES</b>	<b>1,943,063</b>	<b>782,549</b>	<b>40%</b>	<b>2,179,426</b>	<b>2,209,427</b>	<b>101%</b>	<b>3,054,430</b>	<b>140%</b>	<b>875,004</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Materials and Services	127,640	127,640	100%	132,770	88,513	67%	132,770	100%
Capital Outlay	28,259,526	16,769,496	59%	23,640,057	15,312,828	65%	23,235,517	98%	404,540
<b>TOTAL REQUIREMENTS</b>	<b>28,387,166</b>	<b>16,897,136</b>	<b>60%</b>	<b>23,772,827</b>	<b>15,401,342</b>	<b>65%</b>	<b>23,368,287</b>	<b>98%</b>	<b>404,540</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In	14,230,313	12,238,662	86%	12,500,000	5,000,000	40%	12,500,000	100%
<b>TOTAL TRANSFERS</b>	<b>14,230,313</b>	<b>12,238,662</b>	<b>86%</b>	<b>12,500,000</b>	<b>5,000,000</b>	<b>40%</b>	<b>12,500,000</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	24,548,274	27,223,832	111%	19,012,380	23,347,907	123%	23,347,907	123%
Resources over Requirements	(26,444,103)	(16,114,587)		(21,593,401)	(13,191,914)		(20,313,857)		1,279,544
Net Transfers - In (Out)	14,230,313	12,238,662		12,500,000	5,000,000		12,500,000		-
<b>TOTAL FUND BALANCE</b>	<b>\$ 12,334,484</b>	<b>\$ 23,347,907</b>	<b>189%</b>	<b>\$ 9,918,979</b>	<b>\$ 15,155,992</b>	<b>153%</b>	<b>\$ 15,534,050</b>	<b>157%</b>	<b>\$5,615,071</b>

A Actual payment higher than budget



# Budget to Actuals Report

## Road CIP (Fund 465) - Capital Outlay Summary by Project

FY24 YTD February 29, 2024

03/27/2024 Item #10.

66.67%

Year Completed

	Fiscal Year 2023			Fiscal Year 2024					
	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Terrebonne Refinement Plan	\$ 7,319,310	\$ 2,200,000		\$ 5,119,310	6,639,405	130%	\$ 6,639,405	130%	\$ (1,520,095)
Hunnel Rd: Loco Rd to Tumalo Rd	4,265,216	2,562,129	60%	1,569,800	1,026,433	65%	2,874,991	183%	(1,305,191)
Transportation System Plan Update	-	51,980			16,064		27,256		(27,256)
Gribbling Rd Bridge	818,500	141,509	17%	704,116	320,329	45%	664,129	94%	39,987
Smith Rock Way Bridge Replace	985,000	122,938	12%	1,417,429	74,631	5%	1,097,477	77%	319,952
Deschutes Mkt Rd/Hamehook Round	1,663,000	750,822	45%	250,000	1,156,497	463%	1,163,838	466%	(913,838)
Powell Butte Hwy/Butler Market RB	785,000	250,902	32%	2,642,402	287,682	11%	1,348,980	51%	1,293,422
Wilcox Ave Bridge #2171-03 Replacement	160,000	-	0%	160,000	-	0%	-	0%	160,000
Paving of Rosland Rd: US 20 to Draf	380,000	260,811	69%		386,480		386,480		(386,480)
Hamehook Rd Bridge #16181 Rehabilitation	96,500	227	0%	595,000	187,930	32%	365,000	61%	230,000
NW Lower Bridge Way: 43rd St to Holmes Rd	100,000	10,825	11%	1,290,000	75,371	6%	159,140	12%	1,130,860
Northwest Way: NW Coyner Ave to NW Altmeter Wy	815,000	-	0%	556,000	-	0%	-	0%	556,000
Slurry Seal 2023	300,000	1,165	0%		357,325		357,325		(357,325)
Terrebonne Wastewater System Phase 1	1,000,000	-	0%	1,000,000	1,000,000	100%	1,000,000	100%	-
Tumalo Reservoir Rd: OB Riley to Sisemore Rd	100,000	-	0%	300,000	377	0%	200,000	67%	100,000
Local Road Pavement Preservation	200,000	-	0%	200,000	-	0%	200,000	100%	-
US20: Locust St	-	-		1,000,000	1,000,000	100%	1,000,000	100%	-
Paving Butler Market - Hamehook to Powell Butte	-	866		320,000	1,454,940	455%	1,454,940	455%	(1,134,940)
Old Bend Rdm Hwy - US 20 to Tumalo	-	-		1,210,000	1,272,506	105%	1,295,556	107%	(85,556)
Paving Of Horse Butte Rd	-	-		460,000	-	0%	-	0%	460,000
Paving Of Obr Hwy: Tumalo To Helmho	-	-		3,000,000	-	0%	880,000	29%	2,120,000
Paving Of Spring River Rd: S Centur	-	-		510,000	-	0%	1,100,000	216%	(590,000)
Slurry Seal 2024	-	-		300,000	-	0%	300,000	100%	-
La Pine Uic Stormwater Improvements	-	-		240,000	-	0%	-	0%	240,000
S Century Dr / Spring River Rd Roun	-	-		177,000	244	0%	526,000	297%	(349,000)
S Century Dr / Huntington Rd Rounda	-	-		169,000	-	0%	-	0%	169,000
Local Access Road Bridges	150,000	-		150,000	-	0%	-	0%	150,000
Radar Speed Sign Replacements	-	-		30,907	30,907	100%	75,907	246%	(45,000)
FY 23 Guardrail Improvements	-	-		150,000	-	0%	-	0%	150,000
Signage Improvements	-	97,156		119,093	-	0%	119,093	100%	-
<b>TOTAL CAPITAL OUTLAY</b>	<b>\$ 28,259,526</b>	<b>\$ 16,491,988</b>	<b>58%</b>	<b>\$ 23,640,057</b>	<b>15,287,121</b>	<b>65%</b>	<b>\$ 23,235,517</b>	<b>98%</b>	<b>\$ 404,540</b>



# Budget to Actuals Report

## Solid Waste - Fund 610

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance	
	Budget	Actuals	%	Budget	Actuals	%				
Franchise Disposal Fees	7,210,000	7,006,324	97%	8,000,000	5,643,103	71%	8,700,000	109%	700,000	A
Private Disposal Fees	3,337,000	2,944,356	88%	3,450,000	2,055,056	60%	3,000,000	87%	(450,000)	A
Commercial Disp. Fee	3,234,000	3,026,577	94%	3,310,000	2,739,631	83%	3,900,000	118%	590,000	A
Franchise 5% Fees	305,000	363,105	119%	565,000	478,119	85%	635,000	112%	70,000	B
Yard Debris	290,000	305,516	105%	400,000	289,137	72%	475,000	119%	75,000	C
Miscellaneous	70,000	140,837	201%	173,000	177,095	102%	238,000	138%	65,000	D
Interest on Investments	30,498	43,342	142%	60,410	88,347	146%	128,090	212%	67,680	E
Special Waste	15,000	62,756	418%	30,000	97,509	325%	115,000	383%	85,000	F
Recyclables	12,000	7,060	59%	7,000	4,958	71%	7,000	100%	-	
Leases	1	1	100%	1	-	0%	1	100%	-	
<b>TOTAL RESOURCES</b>	<b>14,503,499</b>	<b>13,899,874</b>	<b>96%</b>	<b>15,995,411</b>	<b>11,572,954</b>	<b>72%</b>	<b>17,198,091</b>	<b>108%</b>	<b>1,202,680</b>	

REQUIREMENTS	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance	
	Budget	Actuals	%	Budget	Actuals	%				
Personnel Services	3,277,684	3,139,678	96%	4,108,983	2,354,006	57%	4,020,900	98%	88,083	G
Materials and Services	6,473,358	5,716,762	88%	7,683,911	4,538,043	59%	7,715,539	100%	(31,628)	H
Capital Outlay	264,000	181,603	69%	309,000	225,560	73%	265,856	86%	43,144	H
Debt Service	1,739,630	1,731,017	100%	2,302,340	763,514	33%	2,302,340	100%	-	
<b>TOTAL REQUIREMENTS</b>	<b>11,754,672</b>	<b>10,769,061</b>	<b>92%</b>	<b>14,404,234</b>	<b>7,881,123</b>	<b>55%</b>	<b>14,304,635</b>	<b>99%</b>	<b>99,599</b>	

TRANSFERS	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance	
	Budget	Actuals	%	Budget	Actuals	%				
SW Capital & Equipment Reserve	(5,299,665)	(3,453,962)	65%	(2,613,962)	(1,309,304)	50%	(2,613,962)	100%	-	
<b>TOTAL TRANSFERS</b>	<b>(5,299,665)</b>	<b>(3,453,962)</b>	<b>65%</b>	<b>(2,613,962)</b>	<b>(1,309,304)</b>	<b>50%</b>	<b>(2,613,962)</b>	<b>100%</b>	<b>-</b>	

FUND BALANCE	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance	
	Budget	Actuals	%	Budget	Actuals	%				
Beginning Fund Balance	3,107,198	3,066,662	99%	2,416,385	2,743,514	114%	2,743,514	114%	327,129	
Resources over Requirements	2,748,827	3,130,814		1,591,177	3,691,831		2,893,456		1,302,279	
Net Transfers - In (Out)	(5,299,665)	(3,453,962)		(2,613,962)	(1,309,304)		(2,613,962)		-	
<b>TOTAL FUND BALANCE</b>	<b>\$ 556,359</b>	<b>\$ 2,743,514</b>	<b>493%</b>	<b>\$ 1,393,600</b>	<b>\$ 5,126,041</b>	<b>368%</b>	<b>\$ 3,023,008</b>	<b>217%</b>	<b>\$1,629,408</b>	

- A** Total disposal fee projections reflect management's best estimate of revenues to be collected. Disposal tons are typically higher in the summer with reductions in winter; fiscal YTD tons are running 1% lower than last year-to-date vs. a budgeted 3% reduction. July Commercial revenue includes payment for the prior Hwy 97 bypass disposal charges. Franchise disposal fee payment of \$219K was not received from Cascade Disposal by closing.
- B** Annual fees due April 15, 2024; received year-to-date monthly installments from Republic
- C** Yard Debris revenue is seasonal with higher utilization in summer months; fiscal YTD volumes are running 4% higher than last year-to-date
- D** Miscellaneous revenue exceeds expectation for rock, restitution, fire reimbursement and other revenue
- E** Investment Income projected to come in higher than budget
- F** Special Waste revenue source is unpredictable and dependent on special clean-up projects of contaminated soil and asbestos (i.e. stormwater control sediment and debris, remediation of tanker truck accident, Hwy 97 bypass asbestos, etc.)
- G** Delayed hiring of new positions and change from Personnel On Call to M&S Temp Labor for Sr. Advisor services positively impacted projection
- H** Backhoe and grader equipment originally budgeted as capital, but processed as M&S Road Dept. transfer



# Budget to Actuals Report

## Fair & Expo - Fund 615

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Events Revenue	745,759	948,145	127%	1,050,000	574,984	55%	864,790	82%	(185,210) A
Food & Beverage	745,000	1,048,507	141%	991,000	936,272	94%	1,369,751	138%	378,751 B
Rights & Signage	105,000	97,159	93%	105,000	77,616	74%	94,616	90%	(10,384)
Horse Stall Rental	49,000	78,825	161%	100,000	51,300	51%	67,030	67%	(32,970)
Storage	65,000	45,551	70%	50,000	32,336	65%	38,136	76%	(11,864)
Camping Fee	20,000	23,500	118%	22,500	17,027	76%	37,052	165%	14,552
Interest on Investments	5,221	15,485	297%	22,000	15,293	70%	22,100	100%	100
Miscellaneous	3,554	3,536	99%	3,000	5,064	169%	5,188	173%	2,188
<b>TOTAL RESOURCES</b>	<b>1,738,534</b>	<b>2,260,708</b>	<b>130%</b>	<b>2,343,500</b>	<b>1,709,891</b>	<b>73%</b>	<b>2,498,663</b>	<b>107%</b>	<b>155,163</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Personnel Services	1,256,902	1,313,682	105%	1,748,441	935,565	54%	1,368,559	78%
Personnel Services - F&B	170,247	85,623	50%	148,510	38,225	26%	100,100	67%	48,410 D
Materials and Services	965,684	1,168,404	121%	1,222,986	742,262	61%	1,190,328	97%	32,658
Materials and Services - F&B	603,950	661,314	109%	514,200	482,451	94%	703,914	137%	(189,714) E
Debt Service	101,270	101,267	100%	100,190	56,119	56%	100,190	100%	-
<b>TOTAL REQUIREMENTS</b>	<b>3,098,054</b>	<b>3,330,291</b>	<b>107%</b>	<b>3,734,327</b>	<b>2,254,622</b>	<b>60%</b>	<b>3,463,091</b>	<b>93%</b>	<b>271,236</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In - Room Tax	1,101,342	1,019,042	93%	1,009,023	672,672	67%	975,271	97%
Transfers In - Park Fund	30,000	30,000	100%	30,000	20,000	67%	30,000	100%	-
Transfers Out	(427,215)	(427,215)	100%	(163,342)	(108,888)	67%	(163,342)	100%	-
<b>TOTAL TRANSFERS</b>	<b>704,127</b>	<b>621,827</b>	<b>88%</b>	<b>875,681</b>	<b>583,784</b>	<b>67%</b>	<b>841,929</b>	<b>96%</b>	<b>(33,752)</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	971,352	995,519	102%	547,763	547,764	100%	547,764	100%
Resources over Requirements	(1,359,520)	(1,069,583)		(1,390,827)	(544,731)		(964,428)		426,399
Net Transfers - In (Out)	704,127	621,827		875,681	583,784		841,929		(33,752)
<b>TOTAL FUND BALANCE</b>	<b>\$ 315,960</b>	<b>\$ 547,764</b>	<b>173%</b>	<b>\$ 32,617</b>	<b>\$ 586,817</b>	<b>999%</b>	<b>\$ 425,265</b>	<b>999%</b>	<b>\$392,648</b>

- A** Confirmed Contracted Revenue, may continue to grow as additional events are contracted through the end of FY. Some revenue budgeted in Event category earned in F&B category.
- B** Increase due to large events such as FairWell Festival, Cascade Equinox. Some revenue budgeted for Event revenue earned in this category.
- C** Projected Personnel savings based on FY23/FY24 average vacancy rate of 27.2%
- D** Projected Personnel based on vacancy savings to date
- E** F&B Expenses largely align with F&B revenue, due to the cost of good, labor and supplies required to generate revenues



# Budget to Actuals Report

## Annual County Fair - Fund 616

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Concessions and Catering	625,000	815,458	130%	790,000	834,968	106%	834,968	106%	44,968
Gate Receipts	710,000	782,364	110%	775,000	1,042,896	135%	1,042,896	135%	267,896
Carnival	385,000	433,682	113%	430,000	245,809	57%	245,809	57%	(184,191)
Commercial Exhibitors	80,000	117,100	146%	118,200	114,091	97%	114,091	97%	(4,109)
Fair Sponsorship	61,000	99,655	163%	92,500	86,717	94%	86,717	94%	(5,783)
State Grant	53,167	53,167	100%	53,167	53,167	100%	53,167	100%	-
Rodeo Sponsorship	24,000	22,430	93%	30,000	40,721	136%	40,721	136%	10,721
R/V Camping/Horse Stall Rental	20,000	17,520	88%	17,250	31,449	182%	31,449	182%	14,199
Interest on Investments	2,713	13,169	485%	13,500	16,888	125%	24,740	183%	11,240
Merchandise Sales	3,500	3,245	93%	2,500	1,899	76%	1,899	76%	(601)
Livestock Entry Fees	5,000	1,925	39%	2,000	1,940	97%	1,940	97%	(60)
Miscellaneous	-	75		-	39		39		39
<b>TOTAL RESOURCES</b>	<b>1,969,380</b>	<b>2,359,790</b>	<b>120%</b>	<b>2,324,117</b>	<b>2,470,584</b>	<b>106%</b>	<b>2,478,436</b>	<b>107%</b>	<b>154,319</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Personnel Services	169,445	185,165	109%	276,531	114,650	41%	227,432	82%	49,099 <sup>A</sup>
Materials and Services	1,802,585	1,882,326	104%	2,306,325	2,068,053	90%	2,104,958	91%	201,367
<b>TOTAL REQUIREMENTS</b>	<b>1,972,030</b>	<b>2,067,492</b>	<b>105%</b>	<b>2,582,856</b>	<b>2,182,702</b>	<b>85%</b>	<b>2,332,390</b>	<b>90%</b>	<b>250,466</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Transfer In - TRT 1%	75,000	75,000	100%	75,000	50,000	67%	75,000	100%	-
Transfers Out	(231,706)	(231,706)	100%	(109,503)	(73,000)	67%	(109,503)	100%	-
<b>TOTAL TRANSFERS</b>	<b>(156,706)</b>	<b>(156,706)</b>	<b>100%</b>	<b>(34,503)</b>	<b>(23,000)</b>	<b>67%</b>	<b>(34,503)</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
Beginning Fund Balance	384,715	385,854	100%	521,447	521,447	100%	521,447	100%	0
Resources over Requirements	(2,650)	292,298		(258,739)	287,882		146,046		404,785
Net Transfers - In (Out)	(156,706)	(156,706)		(34,503)	(23,000)		(34,503)		-
<b>TOTAL FUND BALANCE</b>	<b>\$ 225,358</b>	<b>\$ 521,447</b>	<b>231%</b>	<b>\$ 228,205</b>	<b>\$ 786,328</b>	<b>345%</b>	<b>\$ 632,990</b>	<b>277%</b>	<b>\$404,785</b>

<sup>A</sup> Projected Personnel based on vacancy savings to date





# Budget to Actuals Report

## Annual County Fair - Fund 616

CY24 YTD February 29, 2024 (unaudited)

	Fair 2023	Fair 2024 Actuals to Date	2024 Projection
<b>RESOURCES</b>			
Gate Receipts	\$ 1,042,896	\$ -	\$ 1,095,041
Carnival	245,809	-	258,099
Commercial Exhibitors	436,160	-	457,968
Livestock Entry Fees	1,940	-	2,037
R/V Camping/Horse Stall Rental	31,449	-	33,021
Merchandise Sales	1,899	-	1,993
Concessions and Catering	512,899	-	538,544
Fair Sponsorship	117,183	-	68,381
<b>TOTAL FAIR REVENUES</b>	<b>\$ 2,390,235</b>	<b>\$ -</b>	<b>\$ 2,455,085</b>
<b>OTHER RESOURCES</b>			
State Grant	53,167	-	53,167
Interest	19,504	4,519	26,519
Miscellaneous	114	-	114
<b>TOTAL RESOURCES</b>	<b>\$ 2,463,020</b>	<b>\$ 4,519</b>	<b>\$ 2,534,885</b>
<b>REQUIREMENTS</b>			
Personnel	175,531	30,436	174,553
Materials & Services	2,124,162	53,238	2,230,370
<b>TOTAL REQUIREMENTS</b>	<b>\$ 2,299,693</b>	<b>\$ 83,674</b>	<b>\$ 2,404,924</b>
<b>TRANSFERS</b>			
Transfer In - TRT 1%	75,000	12,500	81,250
Transfer Out - F&E Reserve	(170,608)	(18,250)	(118,625)
Transfer Out - Fair & Expo	-	-	-
<b>TOTAL TRANSFERS</b>	<b>\$ (95,608)</b>	<b>\$ (5,750)</b>	<b>\$ (37,375)</b>
<b>Net Fair</b>	<b>\$ 67,719</b>	<b>\$ (84,905)</b>	<b>\$ 92,587</b>
<b>Beginning Fund Balance on Jan 1</b>	<b>\$ 952,421</b>	<b>\$ 1,020,140</b>	<b>\$ 1,020,140</b>
<b>Ending Balance</b>	<b>\$ 1,020,140</b>	<b>\$ 935,235</b>	<b>\$ 1,112,727</b>



# Budget to Actuals Report

## Fair & Expo Capital Reserve - Fund 617

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Interest on Investments	7,414	39,492	533%	64,800	58,845	91%	82,080	127%	17,280
Miscellaneous	-	-		-	130,809		130,809		130,809
Local Government Payments	-	277,777		-	-		-		-
<b>TOTAL RESOURCES</b>	<b>7,414</b>	<b>317,269</b>	<b>999%</b>	<b>64,800</b>	<b>189,653</b>	<b>293%</b>	<b>212,889</b>	<b>329%</b>	<b>148,089</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Materials and Services	495,000	100,309	20%	343,555	141,379	41%	343,555	100%
Capital Outlay	375,000	383,000	102%	746,445	169,418	23%	746,445	100%	- <sup>A</sup>
<b>TOTAL REQUIREMENTS</b>	<b>870,000</b>	<b>483,310</b>	<b>56%</b>	<b>1,090,000</b>	<b>310,798</b>	<b>29%</b>	<b>1,090,000</b>	<b>100%</b>	<b>-</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In - TRT 1%	501,683	465,685	93%	462,119	308,072	67%	447,655	97%
Transfers In - Fair & Expo	416,437	416,438	100%	152,565	101,704	67%	152,565	100%	-
Transfers In - Annual County Fair	231,706	231,706	100%	109,503	73,000	67%	109,503	100%	-
Transfers In - Fund 165	-	-		100,000	100,000	100%	100,000	100%	-
<b>TOTAL TRANSFERS</b>	<b>1,149,827</b>	<b>1,113,829</b>	<b>97%</b>	<b>824,187</b>	<b>582,776</b>	<b>71%</b>	<b>809,723</b>	<b>98%</b>	<b>(14,464)</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	1,299,942	1,809,440	139%	2,592,838	2,757,229	106%	2,757,229	106%
Resources over Requirements	(862,586)	(166,040)		(1,025,200)	(121,144)		(877,112)		148,089
Net Transfers - In (Out)	1,149,827	1,113,829		824,187	582,776		809,723		(14,464)
<b>TOTAL FUND BALANCE</b>	<b>\$ 1,587,183</b>	<b>\$ 2,757,229</b>	<b>174%</b>	<b>\$ 2,391,825</b>	<b>\$ 3,218,860</b>	<b>135%</b>	<b>\$ 2,689,840</b>	<b>112%</b>	<b>\$298,015</b>

<sup>A</sup> Capital Outlay appropriations are a placeholder should viable projects be recommended and approved for construction



# Budget to Actuals Report

## RV Park - Fund 618

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
RV Park Fees < 31 Days	605,000	548,219	91%	500,000	296,563	59%	453,843	91%	(46,157)
RV Park Fees > 30 Days	13,000	10,249	79%	12,500	19,220	154%	20,550	164%	8,050
Cancellation Fees	14,000	8,636	62%	7,000	4,582	65%	4,982	71%	(2,018)
Washer / Dryer	4,200	5,560	132%	5,000	2,854	57%	4,179	84%	(821)
Miscellaneous	3,750	2,907	78%	2,500	2,976	119%	3,846	154%	1,346
Interest on Investments	552	2,764	501%	2,300	5,112	222%	7,460	324%	5,160
Vending Machines	1,750	1,492	85%	1,500	944	63%	1,275	85%	(225)
<b>TOTAL RESOURCES</b>	<b>642,252</b>	<b>579,826</b>	<b>90%</b>	<b>530,800</b>	<b>332,252</b>	<b>63%</b>	<b>496,135</b>	<b>93%</b>	<b>(34,665)</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Personnel Services	111,153	82,265	74%	91,328	58,756	64%	93,047	102%
Materials and Services	259,755	192,620	74%	303,173	147,564	49%	227,029	75%	76,144
Debt Service	223,273	223,272	100%	222,630	166,310	75%	222,630	100%	-
<b>TOTAL REQUIREMENTS</b>	<b>594,181</b>	<b>498,157</b>	<b>84%</b>	<b>617,131</b>	<b>372,631</b>	<b>60%</b>	<b>542,706</b>	<b>88%</b>	<b>74,425</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In - Park Fund	160,000	160,000	100%	160,000	160,000	100%	160,000	100%
Transfers In - TRT Fund	20,000	20,000	100%	20,000	13,328	67%	20,000	100%	-
Transfer Out - RV Reserve	(261,566)	(261,566)	100%	(51,564)	(34,376)	67%	(51,564)	100%	-
<b>TOTAL TRANSFERS</b>	<b>(81,566)</b>	<b>(81,566)</b>	<b>100%</b>	<b>128,436</b>	<b>138,952</b>	<b>108%</b>	<b>128,436</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	116,415	166,536	143%	93,115	166,640	179%	166,640	179%
Resources over Requirements	48,071	81,669		(86,331)	(40,379)		(46,571)		39,760
Net Transfers - In (Out)	(81,566)	(81,566)		128,436	138,952		128,436		-
<b>TOTAL FUND BALANCE</b>	<b>\$ 82,920</b>	<b>\$ 166,640</b>	<b>201%</b>	<b>\$ 135,220</b>	<b>\$ 265,213</b>	<b>196%</b>	<b>\$ 248,505</b>	<b>184%</b>	<b>\$ 113,285</b>



# Budget to Actuals Report

## RV Park Reserve - Fund 619

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Interest on Investments	6,298	21,589	343%	34,300	28,746	84%	40,900	119%	6,600
<b>TOTAL RESOURCES</b>	<b>6,298</b>	<b>21,589</b>	<b>343%</b>	<b>34,300</b>	<b>28,746</b>	<b>84%</b>	<b>40,900</b>	<b>119%</b>	<b>6,600</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Materials and Services	-	-		100,000	3,740	4%	100,000	100%
Capital Outlay	100,000	5,532	6%	74,000	13,130	18%	74,000	100%	- <sup>A</sup>
<b>TOTAL REQUIREMENTS</b>	<b>100,000</b>	<b>5,532</b>	<b>6%</b>	<b>174,000</b>	<b>16,870</b>	<b>10%</b>	<b>174,000</b>	<b>100%</b>	<b>-</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfer In - RV Park Ops	261,750	261,566	100%	51,564	34,376	67%	51,564	100%
<b>TOTAL TRANSFERS</b>	<b>261,750</b>	<b>261,566</b>	<b>100%</b>	<b>51,564</b>	<b>34,376</b>	<b>67%</b>	<b>51,564</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	1,172,718	1,191,937	102%	1,372,453	1,469,559	107%	1,469,559	107%
Resources over Requirements	(93,702)	16,056		(139,700)	11,876		(133,100)		6,600
Net Transfers - In (Out)	261,750	261,566		51,564	34,376		51,564		-
<b>TOTAL FUND BALANCE</b>	<b>\$ 1,340,766</b>	<b>\$ 1,469,559</b>	<b>110%</b>	<b>\$ 1,284,317</b>	<b>\$ 1,515,811</b>	<b>118%</b>	<b>\$ 1,388,023</b>	<b>108%</b>	<b>\$103,706</b>

<sup>A</sup> Capital Outlay appropriations are a placeholder



# Budget to Actuals Report

## Risk Management - Fund 670

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Workers' Compensation	1,234,761	1,226,486	99%	1,111,585	772,255	69%	1,111,585	100%	-
General Liability	892,681	892,681	100%	935,832	623,888	67%	935,832	100%	-
Unemployment	430,179	344,950	80%	439,989	332,551	76%	439,989	100%	A
Property Damage	419,566	419,566	100%	418,028	278,685	67%	418,028	100%	-
Vehicle	248,764	248,764	100%	226,710	151,140	67%	226,710	100%	-
Interest on Investments	49,346	148,514	301%	200,000	172,890	86%	246,700	123%	46,700
Claims Reimbursement	25,000	6,476	26%	20,000	-	0%	25,000	125%	5,000
Skid Car Training	10,000	8,899	89%	10,000	37,460	375%	40,000	400%	30,000
Process Fee- Events/ Parades	1,000	1,260	126%	2,000	715	36%	2,000	100%	-
Miscellaneous	180	-	0%	200	-	0%	200	100%	-
<b>TOTAL RESOURCES</b>	<b>3,311,477</b>	<b>3,297,596</b>	<b>100%</b>	<b>3,364,344</b>	<b>2,369,585</b>	<b>70%</b>	<b>3,446,044</b>	<b>102%</b>	<b>81,700</b>

REQUIREMENTS	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Workers' Compensation	1,580,000	1,493,702	95%	1,880,000	1,271,091	68%	1,756,604	93%	123,396
General Liability	3,000,000	470,875	16%	1,200,000	489,254	41%	1,051,035	88%	148,965
Insurance Administration	607,558	602,676	99%	714,197	440,055	62%	713,370	100%	827
Vehicle	200,000	194,089	97%	400,000	132,822	33%	389,015	97%	10,985
Property Damage	300,248	99,913	33%	300,250	377,514	126%	475,003	158%	(174,753)
Unemployment	200,000	54,473	27%	250,000	83,102	33%	125,000	50%	125,000
<b>TOTAL REQUIREMENTS</b>	<b>5,887,806</b>	<b>2,915,728</b>	<b>50%</b>	<b>4,744,447</b>	<b>2,793,837</b>	<b>59%</b>	<b>4,510,027</b>	<b>95%</b>	<b>234,420</b>

TRANSFERS	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Transfers Out - Vehicle Replacement	(3,500)	(3,500)	100%	(3,500)	(2,328)	67%	(3,500)	100%	-
Transfers Out - IT	-	-	-	(32,000)	-	0%	(32,000)	100%	B
Transfers Out - IT Reserve	-	-	-	(118,000)	(118,000)	100%	(118,000)	100%	B
<b>TOTAL TRANSFERS</b>	<b>(3,500)</b>	<b>(3,500)</b>	<b>100%</b>	<b>(153,500)</b>	<b>(120,328)</b>	<b>78%</b>	<b>(153,500)</b>	<b>100%</b>	<b>-</b>

FUND BALANCE	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Beginning Fund Balance	7,687,180	8,944,938	116%	8,000,000	9,323,307	117%	9,323,307	117%	1,323,307
Resources over Requirements	(2,576,329)	381,869	-	(1,380,103)	(424,253)	-	(1,063,983)	-	316,120
Net Transfers - In (Out)	(3,500)	(3,500)	-	(153,500)	(120,328)	-	(153,500)	-	-
<b>TOTAL FUND BALANCE</b>	<b>\$ 5,107,351</b>	<b>\$ 9,323,307</b>	<b>183%</b>	<b>\$ 6,466,397</b>	<b>\$ 8,778,726</b>	<b>136%</b>	<b>\$ 8,105,824</b>	<b>125%</b>	<b>\$1,639,427</b>

**A** Unemployment collected on first \$25K of employee's salary in fiscal year

**B** Transfer out to IT to support cyber-security work



# Budget to Actuals Report

## Health Benefits - Fund 675

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Internal Premium Charges	19,908,221	20,496,601	103%	25,899,034	16,711,358	65%	26,389,572	102%	490,538 A
COIC Premiums	1,547,778	1,951,365	126%	1,963,363	1,162,888	59%	2,396,184	122%	432,821 A
Employee Co-Pay	1,282,015	1,247,607	97%	1,247,416	886,655	71%	1,301,274	104%	53,858 B
Retiree / COBRA Premiums	595,000	982,424	165%	1,019,288	611,292	60%	1,206,022	118%	186,734 A
Prescription Rebates	175,000	528,990	302%	280,000	267,230	95%	280,000	100%	- C
Claims Reimbursement & Other	55,000	109,282	199%	124,944	317,060	254%	317,060	254%	192,116
Interest on Investments	95,686	176,071	184%	120,000	137,579	115%	201,780	168%	81,780
<b>TOTAL RESOURCES</b>	<b>23,658,700</b>	<b>25,492,341</b>	<b>108%</b>	<b>30,654,045</b>	<b>20,094,063</b>	<b>66%</b>	<b>32,091,892</b>	<b>105%</b>	<b>1,437,847</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Health Benefits	26,597,563	25,514,122	96%	26,697,663	14,661,650	55%	25,697,663	96%
Deschutes On-Site Pharmacy	3,779,608	3,807,986	101%	4,287,997	2,932,950	68%	4,287,997	100%	- E
Deschutes On-Site Clinic	1,212,497	1,205,226	99%	1,415,279	696,926	49%	1,415,279	100%	- E
Wellness	179,549	161,200	90%	186,274	71,800	39%	186,274	100%	- E
<b>TOTAL REQUIREMENTS</b>	<b>31,769,217</b>	<b>30,688,534</b>	<b>97%</b>	<b>32,587,213</b>	<b>18,363,326</b>	<b>56%</b>	<b>31,587,213</b>	<b>97%</b>	<b>1,000,000</b>
<b>TOTAL □</b>	<b>-</b>	<b>-</b>		<b>-</b>	<b>-</b>		<b>-</b>		

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	11,925,656	11,304,191	95%	5,742,743	6,107,998	106%	6,107,998	106%
Resources over Requirements	(8,110,517)	(5,196,193)		(1,933,168)	1,730,737		504,679		2,437,847
Net Transfers - In (Out)	-	-		-	-		-		-
<b>TOTAL FUND BALANCE</b>	<b>\$ 3,815,139</b>	<b>\$ 6,107,998</b>	<b>160%</b>	<b>\$ 3,809,575</b>	<b>\$ 7,838,734</b>	<b>206%</b>	<b>\$ 6,612,677</b>	<b>174%</b>	<b>\$2,803,102</b>

- A** Health Insurance costs were budgeted at an 11% increase, but the actual increase is 29.35%
- B** The Employee Co-Pay rates increased on January 1, 2024
- C** Budget estimate is based on claims which are difficult to predict
- D** YTD actuals are trending lower than budget
- E** Amounts are paid 1 month in arrears



# Budget to Actuals Report

## 911 - Fund 705 and 710

FY24 YTD February 29, 2024 (unaudited)

03/27/2024 Item #10.

**66.7%**  
Year Complete

RESOURCES	Fiscal Year 2023			Fiscal Year 2024			Projection	%	\$ Variance
	Budget	Actuals	%	Budget	Actuals	%			
Property Taxes - Current Yr	10,402,834	10,493,711	101%	10,932,000	10,633,641	97%	11,001,603	101%	69,603 A
Telephone User Tax	1,668,000	1,881,374	113%	1,827,530	987,551	54%	1,827,530	100%	- B
Interest on Investments	67,515	237,842	352%	312,321	289,834	93%	384,529	123%	72,208
Police RMS User Fees	237,221	244,437	103%	244,435	-	0%	244,435	100%	- C
Contract Payments	153,292	167,764	109%	167,765	36,500	22%	167,765	100%	-
User Fee	140,445	146,863	105%	148,820	76,798	52%	148,820	100%	-
Data Network Reimbursement	120,874	158,228	131%	145,852	531	0%	145,852	100%	-
State Reimbursement	810,000	622,177	77%	93,000	48,000	52%	93,000	100%	- D
Property Taxes - Prior Yr	80,000	90,291	113%	90,000	81,785	91%	90,000	100%	-
Property Taxes - Jefferson Co.	39,497	38,104	96%	40,500	38,972	96%	40,500	100%	-
Miscellaneous	25,000	40,191	161%	32,100	21,583	67%	32,100	100%	-
<b>TOTAL RESOURCES</b>	<b>13,744,678</b>	<b>14,120,981</b>	<b>103%</b>	<b>14,034,323</b>	<b>12,215,193</b>	<b>87%</b>	<b>14,176,134</b>	<b>101%</b>	<b>141,811</b>

REQUIREMENTS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Personnel Services	8,606,196	7,891,350	92%	9,032,045	5,545,257	61%	8,477,752	94%
Materials and Services	4,088,201	3,151,149	77%	4,250,715	2,349,500	55%	4,230,715	100%	20,000
Capital Outlay	5,015,100	2,347,522	47%	1,831,000	1,142,242	62%	1,851,000	101%	(20,000)
<b>TOTAL REQUIREMENTS</b>	<b>17,709,497</b>	<b>13,390,020</b>	<b>76%</b>	<b>15,113,760</b>	<b>9,037,000</b>	<b>60%</b>	<b>14,559,467</b>	<b>96%</b>	<b>554,293</b>

TRANSFERS	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Transfers In	1,750,000	1,750,000	100%	1,950,000	-	0%	1,950,000	100%
Transfers Out	(1,809,900)	(1,809,900)	100%	(1,950,000)	-	0%	(1,950,000)	100%	-
<b>TOTAL TRANSFERS</b>	<b>(59,900)</b>	<b>(59,900)</b>	<b>100%</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

FUND BALANCE	Budget	Actuals	%	Budget	Actuals	%	Projection	%	\$ Variance
	Beginning Fund Balance	12,950,799	12,722,890	98%	13,202,343	13,393,950	101%	13,393,950	101%
Resources over Requirements	(3,964,819)	730,961		(1,079,437)	3,178,193		(383,333)		696,104
Net Transfers - In (Out)	(59,900)	(59,900)		-	-		-		-
<b>TOTAL FUND BALANCE</b>	<b>\$ 8,926,080</b>	<b>\$ 13,393,950</b>	<b>150%</b>	<b>\$ 12,122,906</b>	<b>\$ 16,572,143</b>	<b>137%</b>	<b>\$ 13,010,617</b>	<b>107%</b>	<b>\$887,711</b>

- A** Current year taxes received primarily in November, February and May
- B** Telephone tax payments are received quarterly
- C** Invoices are mailed in the Spring
- D** State GIS reimbursements are received quarterly
- E** Projected Personnel savings based on FY24 average vacancy rate of 8.8%



## BOARD OF COMMISSIONERS

# AGENDA REQUEST & STAFF REPORT

**MEETING DATE:** March 27, 2024

**SUBJECT:** Work Session: RVs as Rental Dwellings Text Amendments

**RECOMMENDED MOTION:**

Staff seeks Board direction for next steps for text amendments concerning RVs as rental dwellings. Options include:

1. Conduct a public hearing.
2. Postpone the public hearing until other jurisdictions have progressed further with similar programs.
3. Withdraw the text amendment.
4. Other.

**BACKGROUND AND POLICY IMPLICATIONS:**

Staff is providing the Board of County Commissioners (Board) with additional background information concerning legislative text amendments to allow recreational vehicles (RVs) as rental dwellings (File No. 247-23-000700-TA). This work session is in response to Board requests made during a work session on February 28. Staff seeks Board direction concerning next steps on the amendments.

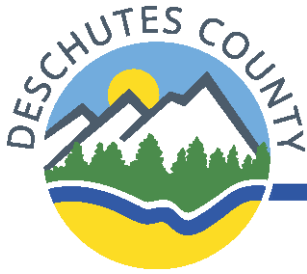
**BUDGET IMPACTS:**

None

**ATTENDANCE:**

Tanya Saltzman, Senior Planner  
Will Groves, Planning Manager  
Peter Gutowsky, Director  
Angie Havniear, Administrative Manager  
Dan Smith, Lead Code Enforcement Specialist  
Todd Cleveland, Onsite Wastewater Manager





MEMORANDUM

TO: Deschutes County Board of Commissioners
FROM: Tanya Saltzman, AICP, Senior Planner
DATE: March 20, 2024
SUBJECT: Work Session – RVs as Rental Dwellings

Staff is providing the Board of County Commissioners (Board) with additional background information concerning legislative text amendments to allow recreational vehicles (RVs) as rental dwellings (File No. 247-23-000700-TA). This work session is in response to Board requests made during a work session on February 28. Staff seeks Board direction concerning next steps on the amendments.

I. PROCEDURAL BACKGROUND

Staff submitted a Post-Acknowledgement Plan Amendment (PAPA) notice to the Department of Land Conservation and Development (DLCD) on October 4, 2023. Staff presented information on the proposed amendments at a Planning Commission work session on October 12, 2023. The Planning Commission held an initial public hearing on November 9, 2023, which was continued to December 14, 2023. At that time, the hearing was closed, and the written record was held open until December 28 at 4:00 p.m. The Planning Commission began deliberating on January 11, 2024 and elected to continue the discussion to January 23 to form a complete recommendation to forward to the Board.

After deliberating, the Planning Commission voted to not recommend adoption by the Board. In addition, the Planning Commission chose to provide recommendations concerning the draft amendments in the event that the Board chooses to move forward with adoption.

Staff provided a summary of the amendments and the process thus far at a February 28 work session, at which time, the Board requested additional information on several topics outlined below.

The record, which contains all memoranda, notices, and written testimony received, is available at the following website: www.deschutes.org/rvamendments.

1 https://www.deschutes.org/bc-pc/page/planning-commission-41
2 https://www.deschutes.org/bc-pc/page/planning-commission-40
3 https://www.deschutes.org/bc-pc/page/planning-commission-43
4 https://www.deschutes.org/bc-pc/page/planning-commission-44

## II. ISSUES FOR CONSIDERATION

The following topics were recommended by the Board for staff to provide additional information. Staff from the Code Enforcement and Onsite Wastewater Divisions will be available to answer questions as well.

### A. Septic/Wastewater

A significant factor in the decision to adopt amendments allowing RVs as rental dwellings relates to septic capacity and impacts. Under the proposal, the property owner would be required to provide a connection to dispose of wastewater from the RV—this is a requirement from Senate Bill 1013. This means that the property would be subject to an Authorization Notice for a new connection and potentially a Site Evaluation and related construction permits if applicable.

Onsite Wastewater Manager Todd Cleveland will be present to discuss RVs as rental dwellings and answer the Board's questions relating to wastewater, including:

- How do wastewater loads for RVs as rental dwellings compare to those for single family dwellings or Accessory Dwelling Units?
- Will most people need to expand or replace their septic system?
- What would this process entail for the property owner (applications and cost) and for staff (staff time, evaluation, code enforcement)?
- Are there concerns about the proposed 1 acre minimum in the County as a whole, and in South County specifically, particularly in light of the recent letter from the Oregon Department of Environmental Quality concerning groundwater quality?

### B. Illegal RVs and Code Enforcement

A concern noted repeatedly in public testimony and acknowledged by the Board is the current presence of illegal RVs as dwellings. While it is difficult to assess the actual number of illegal RVs used as dwellings in the County, the Code Enforcement Division notes that since calendar year 2023, they received complaints of 92 violations of RV occupancy in the County, which would be roughly 13% of their caseload. The actual count of illegal RVs is likely significantly higher, however, since they are only recording formal complaints.

In addition, those RV complaints usually have an associated violation of non-approved septic disposal, which is another violation that typically gets tied with each RV case. Since they are usually combined, it doubles the violation count to 184 and from 13% to roughly 26% of the Code Enforcement workload since 2023.

Common issues other than waste disposal are typically either unpermitted work for the connections to the electrical or septic systems. Solid waste is sometimes an issue, though it is not specifically correlated.

The division noted some enforcement complications regarding RV occupancy: for instance, proving an RV is being occupied full time on lots where there is only an allowance for 30 out of 60 days.<sup>5</sup> To verify a violation, Code Enforcement must be able to prove that the RV is occupied constantly, and there is not a time efficient way to do that other than gathering enough data points over the course of several weeks or months.

Dan Smith, Lead Code Enforcement Specialist and Angie Havniear, Administrative Manager, will be available to answer further questions from the Board.

**C. Comparison to medical hardship dwellings in RVs**

Staff noted that Deschutes County Code already allows people to live in RVs temporarily in certain circumstances; one of these options is as a medical hardship dwelling. Like the current proposal, many of the limitations for the use come directly from statute. Per Board request, staff is providing an overview in Table 1 of medical hardship dwellings in RVs and how they compare to RVs as rental dwellings for both the applicant and for staff.

**Table 1 - RV Comparisons**

Criteria	RV as Medical Hardship Dwelling	RV as Rental Dwelling
<b>Eligible Zones</b>	All zones	RR-10, MUA-10, SR 2 ½, UAR 10, WTZ
<b>Lot Size</b>	No minimum	Minimum 1 acre
<b>Dwellings on Property</b>	A single-family dwelling must be located on the property.  No restrictions on additional dwellings, guest houses, etc.	A single-family owner-occupied dwelling must be located on the property.  No other dwelling, guest houses, etc. are allowed.
<b>Duration</b>	If there continues to be a medical hardship, there is no limit on the duration.	Any duration
<b>Allowed Occupant</b>	Property owner or relative.	Anyone
<b>Required Facilities &amp; Wastewater Disposal</b>	RV must have a bathroom.  Four wastewater disposal options: 1. RV can be pumped by a licensed sewage disposal service; 2. RV can be driven to a permitted dump station; 3. RV can connect to an onsite septic system; or 4. RV can connect to sewer system.	RV must have an operable toilet and sink.  Two wastewater disposal options: 1. RV can connect to an onsite septic system; or 2. RV can connect to sewer system.

<sup>5</sup> DCC 18.116.095(B)(1) allows a single recreational vehicle to be located on a lot or parcel that does not contain a dwelling for a period totaling not more than 30 days in any consecutive 60-day period without obtaining a land use permit.

	In resource zones, if the RV will use a septic system, the RV must connect to the <i>existing</i> septic system, if capacity allows.	
<b>Unique Requirements</b>	<p>To qualify, the property owner or a relative of the property owner must have a medical condition.</p> <p>Property owner must submit a doctor's note annually.</p> <p>In all zones, a manufactured home can be used as a hardship dwelling.</p> <p>In resource zones, structures that existed on March 29, 2017, can be converted to a hardship dwelling.</p>	<p>RV must have a title.</p> <p>10-foot setback from other structures required.</p> <p>If in a structure, must be open on at least two sides.</p> <p>Property owner must provide permitted "essential services" (electric, wastewater).</p> <p>RV site requires parking pad.</p> <p>Restrictive covenant is required to prohibit the RV from being rented as a short term rental.</p>
<b>Eligible Properties/Prevalence of Use</b>	Every rural property in the county is technically eligible for a medical hardship dwelling if it can meet the requirements in DCC to establish one.	Approximately 12,410 properties meet baseline zoning/acreage/existing dwelling criteria; additional 2,900 are vacant but meet other criteria.
<b>CDD Permitting</b>	<p><b>Planning:</b> One permit. However, if the person with the medical condition changes, a new permit is required.</p> <p><b>Septic:</b> Onsite Authorization required to assess existing system/capacity, but there is more discretion for next steps due to the limited duration of use.</p> <p><b>Building:</b> If the connection points are not located adjacent to where the RV is parked, permits are required to install these features: power source connection, water source connection &amp; septic connection.</p>	<p><b>Planning:</b> Two permits: one for RV site, one for RV tenant, which would change with each new tenant.</p> <p><b>Septic:</b> Onsite Authorization required to assess existing system/capacity, which may lead to Site Evaluation and potential septic alteration or installation permit.</p> <p><b>Building:</b> If the connection points are not located adjacent to where the RV is parked, permits are required to install these features: power source connection, water source connection &amp; septic connection.</p> <p>If ramada is required, a residential structural building permit will be required.</p>
<b>Other</b>	The use is inherently non-permanent in nature. Balances property owner needs with off-site impacts to address a specific medical hardship.	

#### **D. Ramadas and potential property tax implications**

Planning staff raised the issue of snow load on RVs and the possibility of requiring the property owner to build a ramada. While it is still yet undetermined if this will be a requirement, staff refers to testimony in the record (2023-11-16) from Todd Straughan, Chief Appraiser, for comments regarding the potential tax implications of any improvements made to the property to accommodate an RV. Straughn noted that the RV itself is not considered real property and therefore would not affect property taxes, but improvements made to the property for the parking pad, pedestal providing essential services, or similar improvements, would:

*We, by statute have to measure market value. So in this instance, we would have to estimate what is the added value of the "pad" with electric, septic, concrete, etc. We can add any value to the real market value of a property; however, if the real market value does not exceed \$18,200 (2024 limit), then we cannot add any taxable value (maximum assessed value). If what the owner adds is more than \$18,200 in RMV, the value added would be added to the existing RMV and it would be multiplied by the ratio for that property type, for that year to calculate how much of that value would be added to the Maximum Assessed Value/Taxable Assessed Value.*

In other words, if the appraiser determines that any property upgrades—including the pad and a ramada—is more than \$18,200 then it could add to the value of the property and thus raise property taxes by the formula the appraiser uses to calculate those taxes—just like any other addition or improvement. But if it's less than \$18,200 it would not trigger an increase in the value used to calculate the taxes.

#### **E. Progress in other counties on SB 1013**

It is staff's understanding that Deschutes County has moved forward with potential implementation of SB 1013 before other Oregon counties. Tillamook County was scheduled to hold its initial public hearing with the Planning Commission on March 14, and Clackamas County is beginning to consider SB 1013. The Board could choose to wait to hold its public hearing until other jurisdictions have proceeded further with SB 1013, allowing for an assessment of those programs and the lessons learned therein.

### **III. NEXT STEPS**

Staff seeks Board direction for next steps. Options include:

1. Conduct a public hearing.
2. Postpone the public hearing until other jurisdictions have progressed further with similar programs.
3. Withdraw the text amendment.
4. Other.



BOARD OF  
COMMISSIONERS

## AGENDA REQUEST & STAFF REPORT

**MEETING DATE:** March 27, 2024

**SUBJECT:** End of Legislative Session Review from Northwest Policy Advocates

**BACKGROUND:**

Deschutes County Lobbyist Doug Riggs, Northwest Policy Advocates, will provide an end of 2024 legislative session review and presentation as well as discuss next steps in preparation for the 2025 legislative session.

**BUDGET IMPACTS:**

None

**ATTENDANCE:**

Jen Patterson, Strategic Initiatives Manager  
Doug Riggs, Northwest Policy Advocates

# Deschutes County 2024 End-of- Session Report

March 2024

03/27/2024 Item #13.



**NORTHWEST  
POLICY ADVOCATES**

# Session Overview

- 135 (of 331) bills passed in 32 days
- Goals: Housing & Ballot Measure 110 reform
- But...Few investments in:
  - Youth programs, or
  - Projects for many parts of rural and Eastern Oregon, despite lawmakers having \$560 million more to spend





# 2024 Session

03/27/2024 Item #13.



# Policy and Funding

Passed

# Ballot Measure 110 Reform

***Numerous hearings (late into the night)***  
***Hours of closed-door meetings***  
***Several iterations of the bill***

***Joint Addictions Committee arrived at a compromise***

[HB 4002](#) passed the House 51-7 and Senate 21-8. Mix of incentives (and potential criminal penalties), plus enhanced substance abuse treatment options. Counties will be assigned much of the task of implementing this new system. Workforce in this area remains a key concern

***The bill is likely to take a potential fall 2024 ballot measure off the table.***



03/27/2024 Item #13.



**Oregon fentanyl deaths: the 'staggering' statistic for how we compare nationally**

Overdose fatalities in Oregon are up more than 1,500% since 2019.

# Behavioral Health

03/27/2024 Item #13.

***Legislators introduced dozens of concepts to improve behavioral health and substance use disorder treatment this session.***

## Passed:

- **HB 4150** – notifies providers of overdoses
- **SB 1553** – makes drug use on public transit a misdemeanor punishable by up to 1 year in jail, a fine of up to \$6,250 or both. Defendants would be eligible for treatment programs
- **HB 4001** – creates a Task Force on Specialty Courts
- **SB 1503** – sets up a Firearm Suicide Prevention Task Force
- **HB 4151** – establishes a Youth Behavioral Health Workforce Subcommittee in the System of Care Advisory Council to improve licensure for youth behavioral health service professions
- **HB 4092** – requires a study on what it would take for counties and their partners to respond to state behavioral health mandates



# Behavioral Health, cont.

The Legislature **funded critical behavioral health and substance use disorder** prevention and treatment programs in its "Christmas tree" bills ([HB 4002](#)/[HB 5204](#)):

- \$7.5 million for **Aid & Assist**,
- \$14.6 million for **Counties' Community Corrections**, and
- Funding for Deschutes County's **Impacts** program
- \$525,000 to **expand detox capacity** and
- \$1.5 million to develop **culturally specific SUD residential capacity** in Central Oregon
- \$1.5 million for the **Deschutes County Stabilization Center**
- Outpatient clinics, residential facilities, sobering centers, opioid treatment (**MAT**) in jail, public defenders and court diversion programs.
- \$18 million for [recovery houses](#)
- **Free on the Outside** – received \$850,000

[HB 5203](#) also allocates \$18.3 million to the Problem Gambling Fund

# Housing & Homelessness

03/27/2024 Item #13.

*The Governor introduced just one bill this session, **SB 1537** (refined legislation that had failed on the last day of the **2023 Session**).*

Numerous provisions designed to speed up housing approvals, give limited opportunities to cities to expand their Urban Growth Boundaries, etc. SB 1537 is the policy portion of the Governor's agenda. SB 1530 includes much of the funding to make all of this happen.

**SB 1530** appropriates **\$279.6 million** General Fund for housing-related projects:

- \$65 million for **shelter support**
- \$34 million for **homelessness prevention services** + \$7 million to the Urban League
- \$5 million for **Individual Development Accounts**
- \$15 million to OHA's **Healthy Homes Repair Fund**
- \$18 million for **housing projects for people recovering from SUD**

# Housing & Homelessness \$, cont.

03/27/2024 Item #13.

**HB 4134** and **HB 4128** will help **cities** fund **infrastructure projects** to develop housing. HB 4134, which passed and is now on the way to the Governor for her signature, includes funding for 4 cities, as well as key criteria requiring that projects: be inside the UGB, have completed land use evaluations, be ready for construction, and generate housing that critical workers can afford (teachers, fire, police, etc.). The funding will be fast-tracked (within 60 days) through "Business Oregon." Several projects from the original version of HB 4128 were also included in SB 1530.

SB 1530 and HB 4134 also fund critical **water, sewer and stormwater projects in Central Oregon**, including:

- \$2.5 million to Redmond
- \$1.425 million to Madras
- \$2 million to Prineville
- \$1.3 million to Culver



House Committee On Housing and Homelessness 02/06/2024 8:00 AM Live

Current Item:  
HB 4134 Public Hearing

303

# Property Tax Foreclosures

***One of the more complex bills of session, HB 4056***

***Supreme Court ruling Tyler v. Hennepin County, Minnesota.***

***Oregon must change its process for owners of tax foreclosed properties to claim any possible surplus funds.***

- Last week of Session: Public hearings and work sessions in both chambers.
- Lane and Deschutes Counties testified
- Asked that Senate Revenue adopt the -6 amendment.

However, the Committee passed the bill as amended (with the -8 amendment). Senator Lynn Findley (R-Vale) noted the concerns expressed by Deschutes County and others, and voted no in Committee, pointing out remaining issues with the bill that should have been addressed. The bill eventually passed the Senate, and will now head to the Governor. Counties are already planning to jointly develop a model ordinance.





# Juniper Water Bill Fix

03/27/2024 Item #13.

**SB 1501** includes the technical fix the *Central Oregon Intergovernmental Council* needs to implement NWPA's 2023 **Stream Restoration and Juniper Management Act**.

Should immediately eliminate the hold-up at the Dept. of Administrative Services. This has prevented COIC from working with Soil and Water Conservation Districts to identify additional potential funding sources for this important water conservation work through Central Oregon Intergovernmental Council.



# Other City & County Issues

03/27/2024 Item #13.

**HB 4003** The Oregon State Police will study the causes and ways to address the shortage of **medical examiners** under a bill passed this session. Expect their report by October of 2025.

**SB 1576** expands the definition of recreation under the state's "**recreational immunity**" law to include walking, running and bicycling, and would protect local governments from lawsuits for one year. The bill will lead to a longer-term solution in time for the 2025 Legislative Session. It passed along partisan lines.

**HB 4045** lowers the **retirement age for firefighters and police officers** with five years on the job from 60 years to 55. The bill reclassifies district attorneys, forensic scientists and evidence technicians as police and increases retirement benefits for employees involved with patients at the Oregon State Hospital and 911 operators. Most of the provisions will take effect Jan. 1, 2025.

# Other County Issues, cont.

03/27/2024 Item #13.

## Passed/funded:

- **SB 1575** – Limits public bodies from including a **duty to defend** requirement in a construction agreement with people providing architecture/landscape architecture/engineering/photogrammetric mapping/transportation planning/land surveying or related professional services, except to the amount of the person's proportionate fault.
- **SB 1566** – Lets counties charge a **maximum fee of \$500 for work on water/sewer/power/other types of infrastructure in road rights of way**. Sunsets Jan. 1, 2031.

# Early Childhood Funding

- **Employment Related Day Care (ERDC)** – Dept. of Early Learning & Care will receive \$99 million to address existing caseload. \$72 million is allocated to a “special purpose account (SPA)” to address additional deficits and hopefully bring some families off the waitlist next year
- **CHIPs & Child Care** ([HB 4098](#)) – \$5 million to increase access to child care near new semiconductor chip manufacturing centers
- **Birth to 5 Literacy** – \$9.4 million in a 2023 SPA was allocated to the Dept. of Early Learning & Care in [HB 5701](#). Half will go to the Early Childhood Equity Fund through culturally specific grantees, and half to the Kindergarten Partnership Fund through Hubs
- **Early Intervention/Early Childhood Special Education** – \$22 million to restore 2023 session cut to the Dept. of Ed. in HB 5701
- **Relief Nurseries** – \$2.7 million in the Joint Addiction & Community Safety Response Committee ([HB 5204](#))
- **Nurse Family Partnership** – \$3.2 million in HB 5204

# Missed Opportunities

Failed bills and funding

# County Issues

03/27/2024 Item #13.

## Failed/not funded:

- CORE3/21st street
- Mountain View Village RV
- [HB 4107](#) – \$ for loss/injury to livestock/dogs by wolves



# Wildfire Prevention & Protection

Three bills to fill funding **gaps for wildfire prevention and protection** failed:

- **HB 4075** was a referral for a ballot measure to Oregon voters to raise property taxes to pay for wildfire programs
- **SB 1593** would have asked Oregonians to vote to reinstate a severance tax on the value of industrial timber harvests for the first time in 30 years
- **HB 4133** would have raised an existing tax on the volume of logs companies harvest while reducing timber and ranch landowner fees for wildfire protection

# Key Bills and Funding Requests

Mysteriously stuck in Ways & Means. Some may return in 2025:

- [SB 1592](#) – would have appropriated \$6 million for 5 higher education schools to expand their existing programs to train the **behavioral health workforce**
- [SB 1594](#) – **Behavioral Health Workforce Safety** Task Force (**\$4.7 million** to OHA & **\$1 million** to United We Heal to help employers implement safety measures)
- [HB 4097](#) – would have **modified the process for setting aside convictions, dismissals, citations and guilty except for insanity**
- Funding for critical local projects, including **fire/EMS resources**, transportation infrastructure for **housing/homeless/RV resources** in rural areas, etc. were left by the wayside, although Legislators are already promising to make these a priority in 10 months for the "long" session in 2025.





# Key Bills and Funding Requests, cont.

Mysteriously stuck in Ways & Means. May return in 2025:

- **HB 4070** – would have provided **mental/behavioral health funding to schools** with and without **School Based Health Centers**. The bill also included a **workforce adjustment** (for the first time since 2013), allowed up to 10 more school districts to plan for SBHCs, and incorporated an innovative “modular” SBHC construction program. Rep. Maxine Dexter (D-Portland) and her co-sponsors were dismayed that the bill did not move. **Rep. Dexter, Senator Sollman** and others were **true champions for kids** this session, and pledged to continue the fight.

Read the [Capitol Chronicle](#) article on **“Kids Left Behind”**

## Oregon Legislature allocates millions for adult addiction, stumbles on funding for children

Oregon lawmakers failed to put nearly \$18 million into school-based health centers that provide drug and mental health counseling among other services



◻ An \$18 million bill that would have expanded school health centers failed in the Legislature. (Samuels/Lauren Oregon Capital Chronicle)

# Next Steps

Preparation for the Election  
& 2025 Session

# Potential 2025 Issues for Deschutes

- HB4056: Foreclosure Efforts (AOC Led)
- Ongoing Groundwater Discussions
- HB3126 / Child Psychiatric Center
- Wildfire funding
- Overall transportation system funding crisis
- CORE3 funding
  - 21st St.
  - 2nd construction bond allocation



# Elected Official News

All 60 Oregon House seats and 15/30 House seats are up for election in Nov., as are Sec. of State, Treasurer and Attorney General, and all 6 US House of Representative seats:

- Rep. **Julie Fahey** (D-Eugene) will replace Speaker **Dan Rayfield** (D-Corvallis) who is running for AG
- WM Chair Sen. **Elizabeth Steiner** (D-Portland) is running for Treasurer. Current Treasurer **Tobias Read** is running for Sec. of State against 5 Ds, including Sen. **James Manning** (D-Eugene)
- 6 Senators can't run for their seats in 2024: **Tim Knopp** (R-Bend), **Art Robinson** (R-Cave Junction); **Brian Boquist** (I-Dallas) is running for State Treasurer; **Dennis Linthicum** (R-Klamath Falls) filed for Sec. of State; **Bill Hansell** (R-Athena) and **Lynn Findley** (R-Vale) will retire.
- **Competitive races:**
  - Senate: **Bend**-based 27th district, **Dick Anderson** (R-Lincoln City), **Chris Gorsek** (D-Troutdale)
  - House: **Kevin Mannix** (R-Salem), **Jeff Helfrich** (R-Hood River), **Cyrus Javadi** (R-Tillamook), **Tracy Cramer** (R-Gervais), **Emerson Levy** (D-Bend), **Annessa Hartman** (D-Gladstone), and **Hoa Nguyen** (D-Portland)
- Running for the legislature (again): **Christine Drazan**, **Bruce Starr** and **Mike McLane**
- Running for US House: District 3 – Rep. **Maxine Dexter** (D-Portland), District 5 – Rep. **Janelle Bynum** (D-Clackamas)



# Interim To-Do List

- ☐ **30+ Days:** Thank and meet with local delegation
- ☐ **90 Days:** Spend time getting to know 1st term members and candidates
- ☐ **60 Days:** Identify potential 2025 issues
- ☐ **Ongoing:** Work with Governor/agencies
- ☐ **Ongoing:** Collaborate with regional/local partners/AOC
- ☐ **Ongoing:** Participate in interim legislative hearings (Possible Bend Hearing with the Joint Committee on Transportation)

# Short Session Done!



**DOUG RIGGS**  
Director

[doug@nwpolicy.com](mailto:doug@nwpolicy.com)



**COREY BARBER**  
Outreach Director

[corey@nwpolicy.com](mailto:corey@nwpolicy.com)