

**2040 PLANNING AND DEVELOPMENT GRANT
INTERGOVERNMENTAL AGREEMENT
Metro – City of Oregon City
Beavercreek Road Industrial Land Readiness Strategic Plan**

This 2040 Planning and Development Grant Intergovernmental Agreement (this “Agreement”) is entered into by and between Metro, a metropolitan service district organized under the laws of the state of Oregon and the Metro Charter, located at 600 Northeast Grand Avenue, Portland OR, 97232 (“Metro”), and Oregon City, a municipality of the State of Oregon, located at 625 Center Street, Oregon City, OR, 97045 (the “City”). Metro and the City may be jointly referred to herein as the “Parties” or each, individually as a “Party”.

RECITALS

WHEREAS, Metro has established a Construction Excise Tax (“CET”), Metro Code Chapter 7.04, which imposes an excise tax throughout the Metro regional jurisdiction to fund regional and local planning that is required to make land ready for development after inclusion in the Urban Growth Boundary; and

WHEREAS, the CET is collected by local jurisdictions when issuing building permits, and is remitted to Metro pursuant to Intergovernmental Agreements to Collect and Remit Tax entered into separately between Metro and the local collecting jurisdictions; and

WHEREAS, the City has submitted a 2040 Planning and Development Grant Request application attached hereto as **Exhibit A** and incorporated herein (the “Grant Request”) for the Beavercreek Road Industrial Land Readiness Strategic Plan (the “Project”); and

WHEREAS, Metro has agreed to provide 2040 Planning and Development Grant Funds to the City for the Project in the amount of \$44,000 subject to the terms and conditions set forth herein (the “Grant Funds”), and the Parties wish to set forth the timing, procedures, and conditions for receiving the Grant Funds from existing CET funds for the Project.

AGREEMENT

NOW THEREFORE, the Parties hereto agree as follows:

1. **Metro Grant Award.** Metro shall provide the Grant Funds to the City for the Project as approved by the Metro Council in Resolution 23-5371 and as described in the Grant Request, subject to the terms and conditions specified in this Agreement.
2. **Project Management and Coordination.** The Parties have appointed the staff identified below to act as their respective project managers (each a “Project Manager” and collectively “Project Managers”) with the authority and responsibility described in this Agreement:

For the City: Ann Griffin, Economic Development Coordinator
Oregon City
agriffin@orc.org
503-974-5517

For Metro: Anais Mathez, Project Manager
3J Consulting
anais.mathez@3j-consulting.com
845.270.3134

Metro and the City may each designate an additional or replacement Project Manager by providing written notice to the other party.

3. Mutual Obligations of both the City and Metro. The Parties and their respective Project Managers will collaborate to oversee the successful implementation of the Project as follows:

- (a) Selection of Consultants. For consultants selected after execution of this contract, the Project Managers will work together to identify consultants best qualified to perform the Scope of Work, attached hereto as **Exhibit B**. The Project Managers and any additional reviewers selected by the Parties will jointly review proposals from consultants and select a mutually agreeable consultant team to perform the work required to successfully complete the Project.
- (b) Schedule of Milestones. The Parties have agreed to a preliminary schedule of milestones for completion of the Project, which is attached hereto as **Exhibit C** ("Schedule of Milestones"). After the Project Managers have selected a consultant team as described in subsection 3(a), the Parties each expressly delegate authority to their respective Project Managers to prepare a revised schedule of Milestones that will provide more detailed performance timelines for the Project, including specific consultant and/or City deliverables for each Milestone, and establishing the amount of Grant Funds to be disbursed by Metro upon satisfactory completion of each Milestone. The Parties agree that once the Milestones are supplemented and revised by the Project Managers in accordance with this subsection, **Exhibit C** shall be automatically amended and the revised Milestones will become final and binding on the Parties unless and until later amended as allowed under paragraph 10 of this Agreement.
- (c) Project Committee(s). The Project Managers will jointly determine the role of the Project steering/technical/advisory committee(s), if any, and the composition of such committees or other bodies. Metro's Project Manager will participate as a member of any such committee.

4. City Responsibilities. The City shall perform the work on the Project described in the Grant Request, and as specified in the Milestones, subject to the terms and conditions specified in this Agreement.

- (a) Use of Grant Funds. The City shall use the Grant Funds it receives under this Agreement only for the purposes specified in the Grant Request and to achieve the Milestones as set forth in this Agreement. In the event that unforeseen conditions require adjustments to the Project scope, approach, or schedule, the City shall obtain Metro's prior written approval before implementing any revisions to the Project.
- (b) Consultant Contract(s). After the Project Managers have selected the consultant team and completed a revision of the Milestones as described above in section 3, the City shall enter into a contract(s) with the selected consultant team to complete the work as described in the Milestones as revised. The contract(s) entered into by the City shall reference this agreement and reflect the Scope of Work and the Milestones, as revised.
- (c) Submittal of Grant Deliverables. Within 30 days after completing each of the Milestones, the City shall submit to Metro all required deliverables for such Milestone, accompanied by an invoice

describing in detail its expenditures as needed to satisfy fiscal requirements. Deliverables must be submitted to Metro as outlined in the Milestones, as revised; the City shall not submit additional deliverables and invoices to Metro for later Milestones until Metro has reviewed and approved all prior deliverables under paragraph 5 of this Agreement.

5. Metro Responsibilities. Metro's funding commitment set forth in this Agreement shall be fulfilled solely through CET funds; no other funds or revenues of Metro shall be used to satisfy or pay any CET grant commitments. Metro shall facilitate successful implementation of the Project and administration of Grant Funds as follows:

- (a) Advisory Role. The Metro Project Manager shall take an active role as part of the Project Advisory Team and at the request of the City Project Manager will review and comment on draft project documents to communicate any concerns prior to the formal submission of the deliverables for each Milestone.
- (b) Review and Approval of Grant Deliverables. Within 15 days after receiving the City submittal of deliverables as set forth in the Milestones (as revised), Metro's Project Manager shall review the deliverables and either approve the submittal, or reply with comments and/or requests for further documentation or revisions that may be necessary. The Metro Project Manager shall determine whether the deliverables submitted are satisfactory in meeting the Scope of Work and the applicable Milestones.
- (c) Payment Procedures. Subject to the terms and conditions in this Agreement, Metro shall reimburse the City for its eligible expenditures for the applicable deliverable as set forth in Revised Exhibit C within 30 days following the Metro Project Manager's approval of deliverables, invoices and supporting documents.

6. Project Records. The City shall maintain all records and documentation relating to the expenditure of Grant Funds disbursed by Metro under this Agreement, as well as records and documentation relating to the financial match being provided by the City for the Project. Records and documents described in this section shall be retained by the City for three years from the date of completion of the Project, expiration of the Agreement or as otherwise required under applicable law, whichever is later. The City shall provide Metro with such information and documentation as Metro requires for implementation of the grant process. The City shall establish and maintain books, records, documents, and other evidence in accordance with generally accepted accounting principles, in sufficient detail to permit Metro or its auditor to verify how the Grant Funds were expended, including records demonstrating how City matching funds were expended.

7. Audits, Inspections and Retention of Records. Metro, together with its auditors and representatives, shall have reasonable access to and the right to examine all City records with respect to all matters covered by this Agreement during normal business hours upon three business days' prior written notice to the City. The representatives shall be permitted to audit, examine, and make excerpts or transcripts from such records, and to make audits of all contracts, invoices, materials, payrolls and other matters covered by this Agreement. All documents, papers, time sheets, accounting records, and other materials pertaining to costs incurred in connection with the Project shall be retained by the City and all of their contractors for three years from the date of completion of the Project, or expiration of the Agreement, whichever is later, to facilitate any audits or inspection.

8. Term. Unless otherwise terminated under paragraph 9, this Agreement shall be effective on the last date it is executed by the parties below, and shall be in effect until all Milestones and deliverables have been completed, all required documentation has been delivered, and all payments have been made as set forth in the Milestones, as revised.

9. Termination. Metro may terminate this Agreement and cancel any remaining Grant Fund payments upon a finding by the Metro Chief Operating Officer that the City has abandoned its work on the Project or is otherwise not satisfying its obligations under this Agreement regarding the requirements of the grant.

10. Amendment. This Agreement may be amended only by mutual written agreement of the Parties.

11. Other Agreements. This Agreement does not affect or alter any other agreements between Metro and the City.

12. Waiver. The Parties hereby waive and release one another for and from any and all claims, liabilities, or damages of any kind relating to this Agreement or the Grant Funds.

13. Authority. City and Metro each warrant and represent that each has the full power and authority to enter into and perform this Agreement in accordance with its terms; that all requisite action has been taken by the City and Metro to authorize the execution of this Agreement; and that the persons signing this Agreement have full power and authority to sign for the City and Metro, respectively.

14. Counterparts. This Agreement may be executed in one or more counterparts, each of which shall be deemed an original and together shall constitute a single document. Electronic signatures, as well as copies of signatures sent by facsimile or electronic transmission, shall be deemed original signatures for all purposes and shall be binding on the Parties.

[Signature Page Follows]

METRO

THE CITY OF OREGON CITY

By: _____
Marissa Madrigal
Chief Operating Officer

By: _____
Aquilla Hurd-Ravich
Community Development Director

Date: _____

Date: _____

Approved as to Form:

Approved as to Form:

By: _____
Carrie MacLaren
Metro Attorney

By: _____
DocuSigned by:
Carrie Richter
11CB45EB2149437...
City Attorney

Date: _____

Date: 2/12/2024

- Attachments:
Exhibit A – Grant Request
Exhibit B – Consultant Scope of Work
Exhibit C – Schedule of Milestones

Exhibit A - 939030

Metro 2040 Proposal – Oregon City 2040 Beaver Creek Road Industrial Land Readiness Strategic Plan

Brief project description (1-2 sentences): This project will develop specific strategies to identify and remove barriers to commercial and industrial development in the Thimble Creek Concept Plan area. Specifically, we will examine potential zoning and infrastructure opportunities that increase the likelihood of recruiting regionally significant industry sectors. This project will identify strategies to remove or improve limitations, and we will investigate and determine if there are opportunities to purchase parcels and assemble land.

Project purpose and regional impact

1. Describe the proposed project and the specific goals for the work. Who are the project partners, if any, and why is this work a priority? Explain how the project will advance industrial site readiness and whether it will address site-specific, industry-specific, or obstacle-specific barriers. Identify any designated Employment Areas (per Metro’s 2040 Growth Concept map) that will be impacted by this project. Describe how impacted communities will be engaged in the project and how their needs and priorities will be incorporated into resulting plans and strategies.

The Community Development and Economic Development Departments of the City of Oregon City are working together to better understand the barriers to commercial and industrial development in and adjacent to the Thimble Creek area of Oregon City.

The Thimble Creek Concept Plan was re-adopted and updated from the Beaver Creek Concept Plan in July 2020. The visioning work began in 2006 and the Thimble Creek (formerly called Beaver Creek) Concept Plan was adopted in 2008 and readopted in 2016. Since then, several properties have been annexed to the City. The Thimble Creek Concept Plan envisioned a complete community with a diverse mix of uses woven together by open space, trails, and sustainable development practices. The area has zoning for employment campus mixed use districts. Presently there are recently developed sites for multifamily residential and some employment uses. There is strong interest to develop more of the residentially zoned land. However, there has been little interest in developing the employment campus land or previously zoned industrial land on the west side of Beaver Creek Road, including Clackamas Community College, which could present partnership opportunities for regionally significant industries.

The purpose of this project is to identify why employment land along Beaver Creek Road has not developed, what are the barriers to development, and what are the opportunities to increase the potential for development of regionally significant industry clusters.

This project will advance industrial site readiness by identifying development obstacles and strategies to reduce those obstacles. It will identify what types of industries are suitable for this location and it will develop strategies to attract industries that are important to the economy of Oregon City and the greater Portland Metro region.

With more analysis and updated engagement, the project team will develop specific strategies to support commercial and industrial development and attract private investment, with the goal of bringing family wage jobs. The proposed project will identify specific barriers to development, suggest specific actions that remove those barriers, and is a critical step in the creation of additional locations for industry in Oregon City.

Along with the lands zoned for industrial and commercial development in the Thimble Creek Concept Plan area, Metro has identified the land just west of Beaver Creek Road as an employment area in its 2040 Regional Growth assessment. Also, part of the area east of Beaver Creek Road is included in the Metro 2040 projection as prime for industrial development. The uploaded map illustrates these areas within Thimble Creek.

Impacted communities include existing residential neighborhoods to the north and west of the project site. Additionally, newly developed multi-family properties in the Thimble Concept Plan area will be impacted. Other communities include the property owners of the land zoned for employment uses and neighboring campus institutions such as Oregon City High School and Clackamas Community College. In addition to the communities physically located in the area, the project team will want to get input from commercial real estate brokers, commercial developers, and regional economic development experts with specific knowledge about industrial site readiness.

While the purpose of this project is not visioning, it is important to hear from those who live and work in the area about concerns and suggestions for what type of development will enhance their neighborhood. This will be balanced with input from industrial development experts and importantly balanced with property owner's desires for future uses of their land. Oregon City staff will work with a consultant to draft and implement a public engagement plan that incorporates the above identified communities.

Community demographics

2. Provide demographic information including race, ethnicity, age, and income of the neighborhood or community that will be affected by the project. Indicate the data source and describe how the project geography relates to the data provided. If appropriate, include not only residential data but also relevant information (even if anecdotal) regarding local businesses, employers, or commercial districts.

Oregon City is a community in Clackamas County with approximately 38,000 residents. The Thimble Creek Concept Plan area in southeastern Oregon City is undergoing a slow transition from low-density residential and agricultural uses to a more commercial location. Oregon City is undertaking this assessment with the goal of supporting efforts to bring well-paid employment opportunities to Oregon City by developing specific strategies to address barriers to development in Thimble Creek.

In terms of race, Oregon City is 82% white, 10% identify as having two or more races and 9.6% are of Hispanic Origin of any race. Finally, 0.9% of our residents are Black, 0.8% are American Indian and 2% are Asian alone (ESRI projection based on 2020 Census). The median age of our population is 40.3 years old. The median household income for Oregon City is \$93,000, and 67% of homes are owner occupied. As there are only 78 families in the Thimble Creek study area, it is more informative to evaluate demographics taken as the City as a whole.

Oregon City is home to approximately 1600 businesses. Our target sector industries include health care, light manufacturing and assembly, and distribution and logistics. Oregon City is the seat of Clackamas County, and as a result, is home to large number of government sector jobs. Oregon City's commercial districts include downtown Oregon City and the Red Soils Business Park.

Oregon City faces significant land constraints that inhibit the community's ability to support business expansion and attract additional jobs. The successful completion of this project is a necessary step if Oregon City is to contribute to Metro's 2040 employment related goals.

Team capacity and experience

3. Identify the roles that lead government staff and key project partners, if any, will play to implement the project and describe their qualifications and experience. Identify the roles and necessary expertise of any consultants to be hired with grant funds.

The proposed project will be managed by Christina Robertson-Gardiner in Community Development with support from Ann Griffin in Economic Development. Together, they will manage the RFP process, provide direction for the consultant team and design and supervise the community engagement work. Christina Robertson-Gardiner was the lead planner on the 2019/2020 Thimble Creek zoning code adoption process. Christina brings a depth of understanding of the land use planning and development process and has existing relationships with area property owners that may be valuable for the process.

Pete Walter, Planning Manager, will support the project and has extensive experience working with Oregon City landowners in the project area since 2006. He was the project manager for the re-adoption of the former Beavercreek Road (now Thimble Creek) Concept Plan in 2015 and has reviewed numerous developments on either side of Beavercreek Road.

Aquilla Hurd-Ravich is the Director of the Oregon City Community Development Department. She has played leadership roles in other Oregon communities, including the City of Tualatin. James Graham is the Economic Development Manager for Oregon City. Over his 30 plus years in economic development, he has created local partnerships across the United States. Both leaders are committed to this project and will provide overall management and direction. They will inform Oregon City elected officials of the importance of the project and help to secure their support.

We expect a consultant team to have expertise in real estate valuation, land use and zoning, and commercial development.

Achievable outcomes

4. What is the extent of the project team's authority to implement your proposed project, make policy, or commit investments? What governing bodies, organizations, or private parties will have to act to ultimately deliver project results? Describe how these influential entities or sponsors will be informed or involved over the course of the project to cultivate their support so that the project outcomes are achieved.

Aquilla Hurd-Ravich and James Graham regularly meet with City Manager Tony Konkol. These three leaders will maintain communication with Oregon City's City Commission and collectively have the authority to guide this process and make policy and project recommendations to Oregon City's elected officials.

As more fully described in the Scope of Work, this project will necessarily engage private sector partners, including property owners in the Thimble Creek area, commercial real estate developers and private investors, either in the form of private equity firms and/or independent businesses willing to partner with other stakeholders to establish a needed location in Oregon City.

Scope of work

5. Succinctly outline your approach to the project and the major project elements and deliverables you envision. Provide a bulleted list outline of the components or phases of work, the tasks and partners involved in each phase or element, the key work products, and the general timeframe to complete the project.

The Oregon City team, both staff and contracted professionals, will examine existing barriers to development in the Thimble Creek Concept Plan area with the goal of identifying solutions to address those barriers. Several important known obstacles include:

1. The relatively small size of the land parcels in the area, fragmented ownership patterns, and lack of coordination among landowners.
2. The challenges associated with relying exclusively on market-driven development to install a critical secondary roadway and other major public infrastructure parallel to Beaver Creek Road.
3. The existence of Bonneville Power Administration powerlines is also significant as the large easements associated with the powerlines prohibit the construction of buildings, although roads, trails, landscaping and public utilities may be allowed. However, this project scope will not directly address this challenge.

The following scope of work is a high-level overview that will be further refined and defined with selected consultants :

- Phase I:
 - Release an RFP to solicit a professional consulting firm specializing in real estate and economic development with familiarity of the Clackamas land market. This team will primarily focus on data analysis, identifying barriers, constraints, opportunities, and strategic planning, and the consultant team will assist the city staff with stakeholder engagement. Possible outcomes of the strategic planning could include 3-4 development scenarios based upon the assumed purchase and assembly of property in the Thimble Creek Concept Plan Area. Potential strategic outcomes could include city staff partnering with the consultant team to approach property owners to ascertain interest in selling their land.
- Phase II:
 - Develop a stakeholder engagement plan and identify how feedback will influence the ultimate strategic plan.
 - Convene follow-up meetings with the owners of property in the Thimble Creek area to understand their vision for the use of the property. That could include the potential sale to a private party or to the City.
 - Gather data to establish existing conditions, determine buildable lands, identify zoning and infrastructure planning
 - Complete an analysis of regionally and locally significant industries that would benefit Oregon City.

Interview City staff and review recent pre-application conference notes for projects in the area that were not developed. Discuss identified barriers.

- Phase III:
 - Identify strategies to attract industrial and commercial development that incorporates information gathered from stakeholders as well the expert knowledge held by the consultant team related to economic and real estate development.
 - In conjunction with City staff, determine site design alternatives to support the development of a secondary road in Thimble Creek. Determine strategies for the partial development of the road that would be funded by the City of Oregon City, rather than the property owners.
- Phase IV:
 - City Commission adoption of the Beavercreek Road Industrial Land Readiness Strategic Plan.
 - Implement amendments to the City zoning code and infrastructure plans as identified in the strategic plan.
 - Implement strategies aimed at attracting commercial and industrial development identified in the strategic plan.

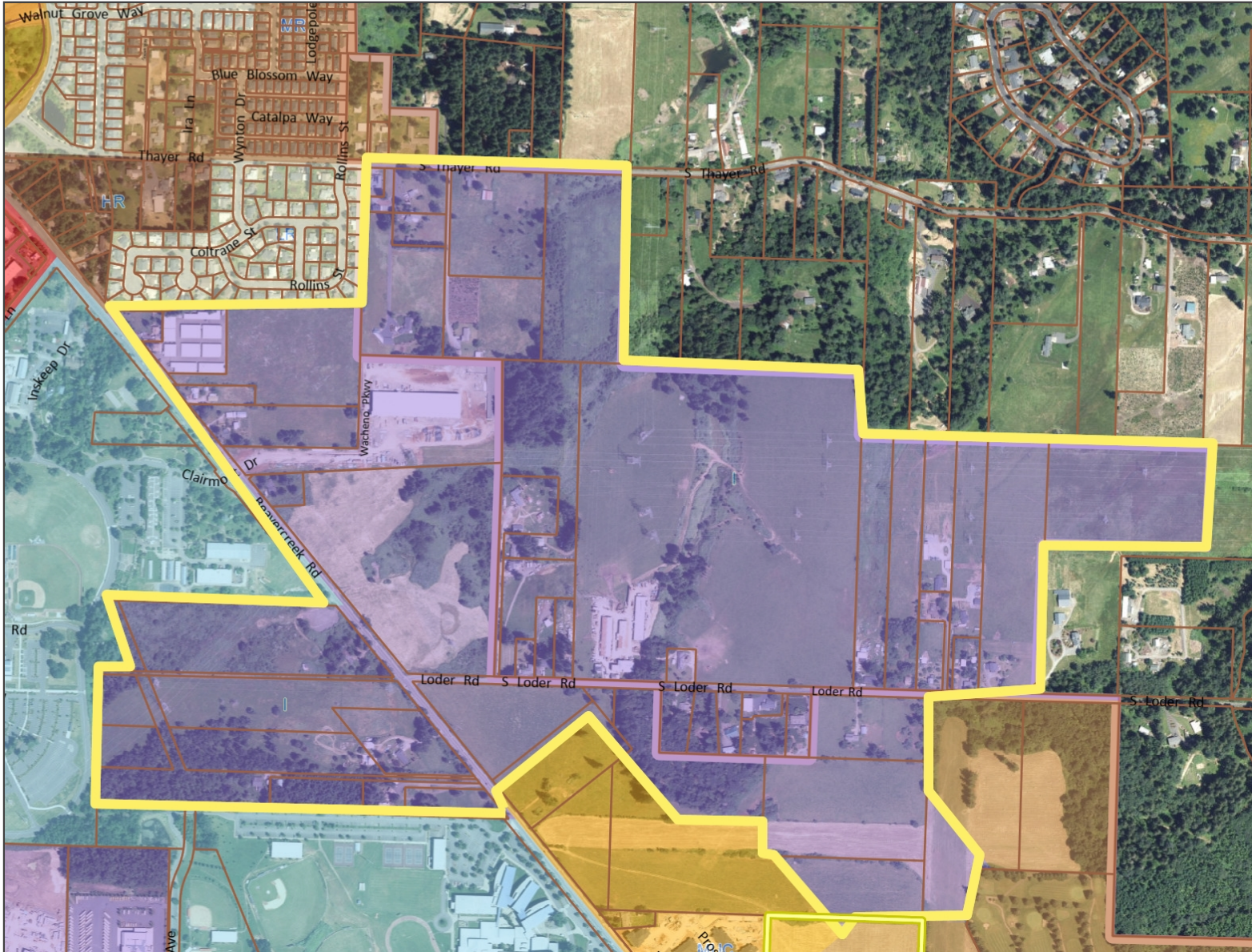
Proposed project budget

6. Use the budget template provided to show the estimated project costs by major phase or component. The budget table should align with the project scope of work and include major tasks or elements identified in question #5. Indicate estimated costs for consultant work as well as other direct project expenses. In the space below, describe the methodology used for estimating project costs, and identify any additional funds (if any) that have been pledged by project partners or other sources.

The Oregon City team requests \$44,000 in grant support and an overall project budget of \$82,950. Grant support will primarily be used to secure consultant groups, with three different teams supporting the project. The three teams include 1) professionals with expertise in commercial development, real estate evaluation and land use planning 2) financial modeling services and 3) a stakeholder meeting moderator.

In addition to the grant request, Oregon City staff estimate that the value of our collective time and materials over the 12-month project period would be approximately \$8,000 for Phase I, \$12,000 for Phases II-III and \$16,750 for Phase IV. Please see the table on the budget page for details.

Oregon City GIS Map



Legend

- Street Names
- Taxlots
- Unimproved ROW
- City Limits
- UGB
- Basemap

Notes



0 800 1,600 Feet

1: 9,600



The City of Oregon City makes no representations, express or implied, as to the accuracy, completeness and timeliness of the information displayed. This map is not suitable for legal, engineering, surveying or navigation purposes. Notification of any errors is appreciated.

Map created 6/23/2023

Metro 2040 Industrial Land Readiness Study Area

City of Oregon City
 PO Box 3040
 625 Center St
 Oregon City
 OR 97045
 (503) 657-0891
www.orcity.org



2040 Planning and Development Grant Application
Proposed project budget | All Application Types

Project Name: Oregon City 2040 Beaver Creek Road Industrial Land Readiness Strategic Plan

Grant Funds Requested: \$ 44,000

Other funds Pledged: \$

38,950

PROJECT COMPONENT (Phase, element, deliverable, etc.)	CONSULTANT FEES	CBO PARTICIPATION AND/OR COMMUNITY LIAISON	OTHER DIRECT PROJECT COSTS	TOTAL
Phase I- Develop and Issue RFP, secure consultant, all staff time			\$ 8,000	\$ 8,000
Phases II-III Primarily consultant work:				
Consultant Team - Redevelopment and Land Use Planning/Annexation Expertise	\$ 35,000			\$ 35,000
Stakeholder engagement plan, data analysis, develop strategic plan				
Financial Modeling - Real estate evaluation	\$ 5,000			\$ 5,000
Community Engagement Processes				\$ -
A. Area Mailing			\$ 1,200	\$ 1,200
B. Print existing area drawings, renderings and posters for public meetings			\$ 400	\$ 400
C. Host 2-3 small group stakeholder meetings - refreshments and supplies			\$ 600	\$ 600
D. Moderator for Stakeholder Meetings	\$ 4,000			\$ 4,000
Staff time for support of stakeholder engagement and data gathering			\$ 12,000	\$ 12,000
				\$ -
Phase IV- Strategic Plan adoption and Implementation			\$ 16,750	\$ 16,750
Primarily staff time some potential for additional consultant work				\$ -
Presentations to Planning Commission, Citizen Involvement Committee, City Commission				\$ -
<i>subtotals</i>	\$ 44,000		\$ 38,950	
TOTAL PROJECT BUDGET				\$ 82,950

RESOLUTION NO. 23-20

A RESOLUTION SUPPORTING THE CITY'S APPLICATION FOR A METRO 2040 GRANT TO STUDY THE BEAVERCREEK ROAD INDUSTRIAL AREA

WHEREAS, The regional government Metro offers Planning and Development grants on a regular cycle to support a range of planning projects and activities; and

WHEREAS, The grants are funded from a regional construction excise tax on building permits issued within the Metro service area.; and

WHEREAS, This cycle the funds will be directed toward four categories: Concept Planning, Equitable Development, Community Engagement, and Industrial Land Readiness.; and

WHEREAS, The Community Development Department and Economic Development Department would like to partner on a grant application for the Industrial Land Readiness category.; and

WHEREAS, Economic and Community Development staff would like to study the Beaver Creek Road Industrial Area to identify barriers to industrial development; and

WHEREAS, If awarded the grant a study will yield strategies and actions to facilitate development of industrial land in the Thimble Creek Concept Plan and on land just east of Beaver Creek Road; and

WHEREAS, As part of the grant application, Metro is seeking confirmation of the City Commission's support of this grant application, the use of staff time toward this effort, and implementation of actions to develop industrial land.

NOW, THEREFORE, OREGON CITY RESOLVES AS FOLLOWS

Section 1. This resolution shall take effect immediately upon its adoption by the City Commission.

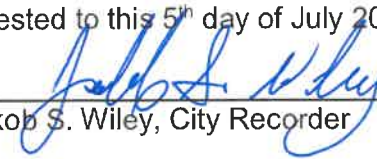
Section 2. The City Commission of Oregon City supports City staff submitting an application for a grant to study the Beaver Creek Road Industrial Area.

Section 3. The City Commission supports the use of staff time toward this project and will support implementing strategies and actions to facilitate development of industrial land.

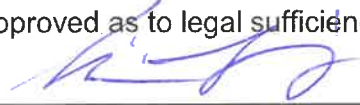
Approved and adopted at a regular meeting of the City Commission held on the 5th day of July 2023.


DENYSE C. MCGRIFF
Mayor

Attested to this 5th day of July 2023:


Jakob S. Wiley, City Recorder

Approved as to legal sufficiency:


City Attorney

METRO CONTRACT 939030 - EXHIBIT B

January 9, 2024

Oregon City 2040 Beaver Creek Road Industrial Land Readiness Strategic Plan | City of Oregon City

Scope of Work

Task 1. Project management

- Schedule a kick-off meeting to review scope, roles and responsibilities, and project schedules.
- Participate in regular PMT meetings and prepare monthly invoices.

Deliverables: PMT meetings, Revised scope and schedule; Monthly Invoices; Kick-off meeting

Timeline: Ongoing

Task 2. Stakeholder Engagement

- Develop a stakeholder engagement plan and identify how feedback will influence the ultimate strategic plan.
- Convene follow-up meetings and focus groups with the owners of property in the Thimble Creek area to understand their vision for the use of the property. That could include the potential sale to a private party or to the City.
- Interview City staff and review recent pre-application conference notes for projects in the area that were not developed. Discuss identified barriers.

Deliverables: Draft and Final Stakeholder Engagement Plan; Up to 4-6 property owner interviews, 2 roundtable interviews with City staff, Draft and Final Outreach Summary of development barriers and presentation

Timeline: March-May

Task 3. Existing Conditions and Analysis

- Gather data to establish existing conditions, determine buildable lands, identify zoning and infrastructure planning
- Review Oregon City Development Code/process –identify any potential barriers or outliers that deviate from the regional norm.
- Complete an analysis of regionally and locally significant industries that would benefit Oregon City.
- Complete real estate appraisals of selected property/ies in the study area.

Deliverables: Baseline data; Draft and Final Summary of significant industries

Timeline: March-June

Task 4. Strategic Implementation Plan and Site Design Alternatives

- Identify strategies to attract industrial and commercial development that incorporates information gathered from stakeholders as well as the expert knowledge held by the consultant team related to economic and real estate development.

In conjunction with City staff, determine which development obstacle is greatest (i.e., Loder Road alignment or development of a secondary road). Develop site design alternatives and funding strategies that match this determination.

Deliverables: Draft and final strategic plan including implementation strategies, funding and financing options; up to three site design alternatives for development

Timeline: June-August

METRO CONTRACT 939030 - EXHIBIT C

January 9, 2024

Oregon City 2040 Beaver Creek Road Industrial Land Readiness Strategic Plan | City of Oregon City**Project Milestones, Deliverables, and Disbursement of Grant Funds**

PROJECT MILESTONE AND SPECIFIED GRANT DELIVERABLES		DATE DUE	PROGRESS PAYMENT
1	Execution of grant agreement a) Complete project documents b) Signed and executed IGA	February 29, 2024	\$0
2	Consultant Contracting a) Request for Proposals (RFP) b) Submit draft consultant scope(s) of work, schedule, and budget for review c) Establish revised milestones and deliverables to amend grant agreement Exhibit C to coincide with consultant contract(s) d) Finalize and execute consultant scope(s) and contract(s)	March 29, 2024	\$0
3	Stakeholder Engagement a) Final Stakeholder Engagement Plan b) Up to 4-6 property owner interviews and focus groups c) Up to 2 City staff roundtable interviews d) Outreach summary of development barriers and presentation	May 31, 2024	\$12,000
4	Existing Conditions and Analysis a) Baseline data b) Oregon City development code/process review c) Summary analysis of significant industries d) Potential property appraisal(s)	June 28, 2024	\$13,000
5	Strategic Implementation Plan and Site Design Alternatives a) Final strategic plan including implementation strategies, funding and financing options b) Up to three site design alternatives for development	August 30, 2024	\$14,000

METRO CONTRACT 939030 - EXHIBIT C
Oregon City 2040 Thimble Creek Industrial Land Readiness Strategic Plan | City of Oregon City

Continued

6	<p>Adoption and Implementation</p> <p>a) Presentations to City Commission, Planning Commission and Citizen Involvement Committee</p> <p>b) City Commission adoption by resolution of the Thimble Creek Industrial Land Readiness Strategic Plan</p>	November 29, 2024	\$0
7	<p>Grant Completion Documentation</p> <p>a) Final financial report submitted and backup documentation retained on file as appropriate</p> <p>b) Final reporting on grant performance measures submitted and approved by Metro</p>	December 31, 2024	\$5,000

APPROVED GRANT PROJECT EXPENSE DISTRIBUTION												
Changes to the approved expense distribution shown at right must be approved by Metro through an amendment of this Exhibit C.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Consultant Fees</td> <td style="text-align: right; padding: 2px;">\$ 44,000</td> </tr> <tr> <td style="padding: 2px;">Direct Expenses</td> <td style="text-align: right; padding: 2px;">\$ 38,950</td> </tr> <tr> <td style="padding: 2px;">Contingency reserves</td> <td style="text-align: right; padding: 2px;">\$ 0</td> </tr> <tr> <td style="padding: 2px;">TOTAL METRO GRANT FUNDS</td> <td style="text-align: right; padding: 2px;">\$ 44,000</td> </tr> <tr> <td style="padding: 2px;">TOTAL OREGON CITY FUNDS</td> <td style="text-align: right; padding: 2px;">\$ 38,950</td> </tr> </table>	Consultant Fees	\$ 44,000	Direct Expenses	\$ 38,950	Contingency reserves	\$ 0	TOTAL METRO GRANT FUNDS	\$ 44,000	TOTAL OREGON CITY FUNDS	\$ 38,950	
Consultant Fees	\$ 44,000											
Direct Expenses	\$ 38,950											
Contingency reserves	\$ 0											
TOTAL METRO GRANT FUNDS	\$ 44,000											
TOTAL OREGON CITY FUNDS	\$ 38,950											