Attachment A – Scope of Work for City of Sherwood

Contextualized Housing Need and Housing Capacity Analysis

September 22, 2026

Project Purpose: The purpose of this project ("Project") is to meet state requirements for preparing and adopting the following for the City of Sherwood ("Sherwood"):

- Contextualized Housing Need ("CHN") analysis as described in OAR 660-008-0075 that relates to Sherwood's allocated housing need and housing production target, as provided in ORS 184.451 to 184.455 and OAR 660-008-0045(7), to local qualitative and quantitative information. This analysis uses current and future housing needs, along with population and market trends, to evaluate fair housing choice and identify fair housing issues in Sherwood to affirmatively further fair housing. The output of the analysis is a determination of the needed types, characteristics, and locations of housing that Sherwood must plan for in its eight-year housing capacity and production cycle to mitigate and remedy the identified fair housing issues in furtherance of fair housing choice, and
- Housing Capacity Analysis ("HCA"), as described in ORS 197A.270, which will incorporate the state-provided Housing Need Allocation.

Project Implementation: Consultant shall prepare final deliverables in conformance with applicable state requirements. Certain aspects of the CHN and HCA may be done at the same time. The Consultant shall manage nearly all aspects of the process, including managing public outreach, equitable engagement, and the creation and management of any advisory committee that the Consultant deems necessary to complete the Project, as outlined below. The Consultant shall coordinate with Sherwood staff to participate in the meetings, provide documents upon request, make suggestions for outreach, coordinate legal notices; agendas and minutes for public hearings and participate in the adoption process, as outlined below.

TASK 1: Project Management

1a. Project Kickoff

The purpose of the Project kick-off is for the Consultant to become familiar with local conditions and with Sherwood's planning documents, for the parties to confirm the objectives of the Project and refine the Project schedule, and for Sherwood to prepare for the Project. The Consultant shall convene a kickoff meeting to establish Project expectations and familiarize themselves with Sherwood-specific concerns. The Consultant shall verify the action items identified through this initial meeting with Sherwood staff and will develop a proposed schedule for the actions required for the completion of all tasks. The level of detail required for the proposed Project schedule should be determined and with mutual agreement by Sherwood and the Consultant.

1b. Project Administration

The Consultant shall have biweekly Project Management Team ("PMT") calls with Sherwood to discuss major Project milestones and work products, address questions, and identify follow-up actions.

Task 1 Consultant Deliverables:

1.1: Agenda and summary of the kickoff meeting, including summary of updated priorities and major tasks for the Project and Materials for a joint Planning Commission and City Council meeting;
1.2: Proposed Project schedule; and
1.3: Agenda and notes for biweekly PMT meetings.

Task 1 City Deliverables:

1.1: Copy of relevant comprehensive plan and housing related planning documents, including equitable engagement summaries, or other relevant Local Government data and/or documents.

Anticipated Timeline: September 2026 – Project completion

TASK 2: Equitable Community Engagement

2a Equitable Engagement Plan

The Consultant shall support Sherwood staff, as directed, in planning equitable engagement and providing communications and public outreach assistance related to the Project. The Consultant shall prepare, for Sherwood review and approval, an Equitable Engagement Plan to engage key stakeholder groups through a variety of strategies that are intended to include communities of color, low-income communities, individuals with disabilities, and tribal communities, with the goal of facilitating meaningful consideration of these perspectives, consistent with applicable requirements and within the scope of services.

The equitable engagement approach should describe:

- The procedure for engagement (i.e., the types of engagement);
- The groups or organizations who will be engaged;
- Topics and key questions for the engagement; and
- A rough schedule for engagement.

The Consultant shall help plan for the engagement, including helping to define the questions and topics for the outreach and methods to solicit input and referring to DLCD's Equitable Engagement Toolkit or OAR 660-012-0130 to employ best practices regarding equitable engagement.

The Consultant shall coordinate with Sherwood staff to connect with existing networks and feedback, support facilitation (if appropriate), and support successful execution of equitable engagement pursuant to OAR 660-008-0075(5).

Sherwood will satisfy the engagement requirement to center tribal communities when notice has been made to all tribes with ancestral connection to land within Sherwood's jurisdiction or approved expansion areas from the Oregon Legislative Commission on Indian Services by inviting government-to-government consultation and staff coordination in the development of Sherwood's contextualized housing need, pursuant to OAR 660-08-0075(5)(c).

> *Note: Except for the requirement to center tribal communities by coordinating and consulting with tribes, if the Local Government has comprehensive housing-related engagement feedback completed within the last five years that sufficiently informs the contextualized housing need*
>
> *requirements and the Local Government finds that additional equitable engagement would not align with best practices in the Department's Equitable Engagement Toolkit, the Local Government may rely entirely on existing engagement feedback and forego engagement for the Contextualized Housing Needs. Instead, the Local Government must include an explanation for this determination as part of the equitable engagement summary.*

2b Stakeholder Interviews/Focus Groups

The Consultant shall collaborate with Sherwood staff to identify and provide introductions/invitations to up to four (4) meetings with communities of color, low-income communities, individuals with disabilities, and tribal communities. The Consultant shall schedule interviews or focus group with identified parties, conduct the meetings, and prepare a written summary.

A summary of the following based on the focus groups, interested stakeholders, and decision maker meetings:

- The interested parties that were engaged and how interested parties were engaged, including why they were engaged, engagement methods used, a list of each engagement effort or event being used to develop the CHN, and the interested parties, communities, or tribes who may still be underrepresented in the engagement process
- Feedback received from each engagement effort or event, as well as description of the major feedback themes attributed to the likely impacted interested parties, communities, and tribes, including how each major feedback theme influenced the identification of fair housing issues and determination of the needed housing types, characteristics, and locations in alignment with program principles or not

2c Advisory Committee Meetings

While Planning Commission can fill the role of an advisory committee, for a city the size of Sherwood in the Metro region, a dedicated project Advisory Committee is recommended. City staff will schedule and provide notice and agendas for three (3) virtual advisory committee meetings to

present the project scope, goals, findings, and recommendations. The 3J Team will support City staff with arrangements and facilitate the meetings.

Advisory Committee meeting topics shall include, but are not limited to:

- Meeting #1
    - Project overview
    - Draft Public Involvement Plan
    - Housing Needs Allocation
- Meeting #2
    - Draft Contextualized Housing Need (CHN)
    - Draft Buildable Lands Inventory (BLI)
- Meeting #3
    - Draft Development-Ready Lands Inventory (DRLI)
    - Draft Residential Land Need Analysis (RLNA)
    - Equitable Engagement Summary
    - Draft HCA

2d Public Meetings and Surveys

The Consultant shall coordinate with Sherwood staff to schedule one (1) public meetings to present required housing findings, statutes and administrative rules. The Consultant shall coordinate with Sherwood to solicit input from the public on the draft deliverables. The Consultant shall coordinate with Sherwood on meeting arrangements and facilitate the public meeting.

Public Meetings topics shall include:

- Housing Needs Allocation Overview and CHN;
- Preliminary CHN and BLI

The Consultant shall also prepare one (1) online survey to allow participation from people who are unable to attend public meetings.

2e Equitable Engagement Summary Document

Following equitable engagement, the Consultant shall produce an equitable engagement summary that includes a list and description of the types of interested parties and communities of color, low-income communities, individuals with disabilities, and tribal communities, in general accordance with OAR 660-08-0075(5)(c). While the equitable engagement summary will initially be produced as a stand-alone memorandum, it will eventually become a section of the HPS. The Consultant shall make it available for public comment. A summary that outlines an evaluation of how the Local Government could improve equitable engagement practices for future housing engagement efforts relevant to the action selection process of an HPS.

Task 2 Consultant Deliverables:

2.1: Draft and final Equitable Engagement Plan;

2.2: Summaries of four (4) virtual housing stakeholder interviews/focus groups;
2.3: Presentation materials, and summary for Advisory Committee Meeting #1;
2.4: Presentation materials, and summary for one (1) public meeting;
2.5: Materials for one (1) online open house and/or survey;
2.6: Presentation materials, and summary for Advisory Committee Meeting #2
2.7: Presentation materials, and summary for Advisory Committee Meeting #3
2.8: Draft Equitable Engagement Summary.

Task 2 City Deliverables:
2.1: Assistance implementing the Housing Conversations by recruiting decision makers, stakeholders, and other interested community members to host the conversations;
2.2: The Local Government will be available to answer questions and support community members who host conversations, with support from the Consultant as needed;
2.3: List of existing interested parties, communities, and tribes for equitable engagement;
2.4: List of most recent tribes with ancestral connection to land (within the Local Government from the Oregon Legislative Commission on Indian Services);
2.5: Notice to tribes with ancestral connection to land within the Local Government from the Oregon Legislative Commission on Indian Services that invites government-to-government consultation and staff coordination in the development of the Local Government's contextualized housing need;
2.6: Any follow up communication, consultation, and coordination as requested by the tribes invited for government-to-government consultation and staff coordination;
2.7: Summary of additional feedback (if any) from engagement executed by the Local Government to be included in the CHN report; and
2.8: Recruitment of participants for the focus groups

Anticipated Timeline: September 2026 – May 2027

TASK 3: Contextualized Housing Need Data Collection and Analysis:

The Consultant shall gather relevant data from the housing production dashboard, housing equity indicators dashboard, equitable engagement already conducted by Sherwood, the Agency's hosted data repository as provided by OAR 660-008-0075(3), and any additional information as provided in OAR 660-008-0075(4) if available and recent within the last five years to understand current and future housing needs, along with population and market trends, to evaluate fair housing choice, and identify fair housing issues in Sherwood to affirmatively further fair housing, including work recently completed by the Consultant under the previous grant cycle.

The Consultant shall coordinate with Sherwood for access to all relevant available local data. The Consultant shall incorporate the state-provided Housing Need Allocation. This work will inform the determination of residential land need in Task 7.

Task 3 Consultant Deliverables:

3.1: CHN Summary Document

Task 3 City Deliverables:
3.1: Materials for a Planning Commission meeting and
3.2: Planning Commission meeting notices, logistics, agenda, and notes

Anticipated Timeline: October 2026 – January 2027

Task 4: Contextualized Housing Needs Summary Document:

While the CHN analysis will initially be produced as a stand-alone memorandum, it will later become a section of the HPS that clearly describes and identifies the housing types, characteristics, and locations needed to remedy, or mitigate the identified fair housing issues to achieve fair housing choice and meet Sherwood's allocated housing need and housing production target while affirmatively furthering fair housing.

The CHN must include the following:

1. An affordability analysis including at a minimum a review of market conditions affecting the provision of needed housing including existing and expected barriers to the development of needed housing;
2. An analysis of past discriminatory actions or practices related to land and housing access including, as practicable given information and resource availability, mapping of the geographies impacted by these actions and comparing those geographies' relationship to current patterns of segregation as well as affluence and poverty as illustrated in the housing equity indicators;
3. An analysis of fair housing choice across the following areas for communities of color, low-income communities, individuals with disabilities, and tribal communities that concludes with the identification and evaluation of fair housing issues within Sherwood:
    - Housing tenure and wealth building opportunities;
    - Permanent housing to resolve homelessness;
    - Accessible and adoptable housing;
    - Access to community assets and mitigation of exposure to harms;
    - Housing stability, anti-displacement and displacement mitigation;
    - Addressing and disrupting patterns of segregation, and their correlation with concentrated areas of affluence and poverty;
    - Any issue areas Sherwood is required to address in other requirements or regulations;
    - Any other issue areas that appear to exist based on occurrences of disparate housing needs in Sherwood across protected classes and named communities in needed housing as provided in ORS 197A.018; and
4. Clear conclusion that describes the needed types, characteristics, and locations of housing that the Local Government must plan for in its eight-year housing production cycle

to mitigate and remedy the identified fair housing issues in furtherance of fair housing choice.

Task 4 Consultant Deliverables:

4.1: Public Review Draft CHN with conclusions from the three analyses noted above that clearly describe and identify the housing types, characteristics, and locations needed to remedy, or mitigate the identified fair housing issues to achieve fair housing choice and meet Sherwood's housing production target while affirmatively furthering fair housing; summarizes past discriminatory actions or practices and
4.2: Final CHN.

Task 4 City Deliverables:

4.1: Making the CHN available for public review;
4.2: Consolidation of comments from the public on the CHN; and
4.3: Meeting notices, logistics, and notes for the joint Planning Commission and City Council meeting

Anticipated Timeline: February – May 2027

TASK 5: Buildable Lands Inventory

The Consultant shall prepare a draft inventory of buildable lands inventory ("BLI") consistent with OAR chapter 660, division 8, as applicable that will incorporate work recently completed by the Consultant as part of the most recent housing assistance grant cycle. The BLI will be used to determine Sherwood's residential land need in Task 8. The Consultant shall develop the BLI based on discussion with a Project advisory committee at one or more committee meetings.

Task 5 Consultant Deliverables:

5.1: Data Collection and Analysis; and
5.2: Draft BLI, including summary, tables, maps, and final GIS layers

Task 5 City Deliverables:

5.1: Data for the BLI and DRLI;
5.2: Up to two rounds of review and comments on the draft BLI; and
5.3: Planning Commission meeting notices, logistics, agenda, and notes.

Anticipated Timeline: October 2026 – March 2027

TASK 6: Development-Ready Lands Inventory

The Consultant shall prepare a draft development ready lands inventory ("DRLI") consistent with ORS 197A.210 and OAR Chapter 660, division 8, as applicable. The DRLI will be informed by the BLI and the findings in the Contextualized Housing Need and the Consultant shall develop the DRLI based on discussion with a Project advisory committee at one or more committee meetings.

Task 6 Consultant Deliverables:

6.1: Data Collection and Analysis;

6.2: Draft DLRI, including summary, tables, maps, and final GIS layers; and
6.3: Final DRLI.

Task 6 City Deliverables:
6.1: Data about existing infrastructure;
6.2: Collaboration with Local Government Departments on infrastructure readiness; and
6.3: Up to two rounds of review and comments on the draft DRLI.

Anticipated Timeline: October 2026 – April 2027

TASK 7: Residential Land Needs Analysis

Based on the outcomes of previous tasks, the Consultant shall prepare a draft residential land needs analysis ("RLNA") that addresses how much land and what zoning Sherwood needs to accommodate its Housing Need, comparing the demand and supply provided in the deliverables produced in earlier tasks. The RLNA will be developed based on discussions with a Project advisory committee at one or more committee meetings and may be developed concurrently with Task 8. The RLNA shall include:

- Summary of the CHN Findings about the types and locations for housing needed over the 20-year period and the 8-year period;
- Documentation of housing development since the last HCA, including analysis of development density by plan designation;
- Allocation of housing need to plan designation for the 20-year period and 8-year period;
- Summary of buildable vacant and partially vacant land where housing can be developed with clear and objective standards and estimate of capacity of buildable land by plan designation;
- Summary of development ready land by plan designation and estimate of capacity of development ready land, may be included in this analysis or may be presented in separate memorandum; and
- Comparison of land capacity and housing need for buildable land (for the 20-year housing allocation) and development ready land (for the 8-year housing production targets).

Task 7 Consultant Deliverables:
7.1: Data Collection and Analysis;
7.2: Draft RLNA; and
7.3: Final hearings ready HCA, including the BLI and RLNA.

Task 7 City Deliverables:
7.1: Up to two rounds of review and comments on the draft HCA report and
7.2: Joint Planning Commission and City Council meeting notices, logistics, agenda, and notes

Anticipated Timeline: October 2026 – May 2027

TASK 8: Final Housing Capacity Analysis Components

The Consultant shall identify options for changes to Sherwood's comprehensive plan and land use regulations to address housing and residential land needs determined in previous tasks.

This task may be completed concurrently with Task 7 (RLNA). If the analysis shows that the Housing Need cannot be accommodated by Sherwood's existing comprehensive plan, the Consultant shall identify options for accommodating Housing Needs through changes to the comprehensive plan and land use regulations as required by OAR chapter 660, divisions 8. Land use efficiency measures may be adopted with the HCA or later with the Housing Production Strategy.

> ***Task 8 Consultant Deliverable:***
> *8.1: Options for changes to Sherwood's comprehensive plan and land use regulations to address housing and residential land needs.*

Anticipated Timeline: March - May 2027