

**APPENDIX K: SCHEMATIC DESIGN SUBMITTAL FORM and CHECKLIST**



**Schematic Design Submittal Form and Checklist**

**Property Owner(s):** \_\_\_\_\_

Homesite # \_\_\_\_\_ Date Received: \_\_\_\_\_

Homesite address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/ST/Zip: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email address(es): \_\_\_\_\_

**Design Professional (if known):** \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/ST/Zip: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email address(es): \_\_\_\_\_

**Builder (if known):** \_\_\_\_\_

Project Manager (If applicable): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/ST/Zip: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email address(es): \_\_\_\_\_

**Landscape Professional (if known):** \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/ST/Zip: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email address(es): \_\_\_\_\_

House Square Footage: \_\_\_\_\_

Garage Square Footage: \_\_\_\_\_

Additional Structure(s) Square Footage: \_\_\_\_\_

TOTAL SQUARE FOOTAGE OF ALL BUILDING IMPROVEMENTS: \_\_\_\_\_

Homesite Square Footage: \_\_\_\_\_

Building Envelope Square Footage: \_\_\_\_\_

Homesite coverage: (maximum of 50% of building envelope): \_\_\_\_\_

Design Review Fee: \$ 5,600.00 \_\_\_\_\_ (includes fee for address marker)

ARC Refundable Deposit: \$1.00 per total square footage \_\_\_\_\_

Please make checks payable to The Tree Farm HOA.

Owner(s) Signature: \_\_\_\_\_

By submitting and signing this document, the Owner(s) acknowledges they, their Design Professional, Builder and Landscape Professional have all read The Tree Farm Design Guidelines and will work together to provide a design that complies with the current Design Guidelines.

*For ARC use only:*

*Site visit date:* \_\_\_\_\_

*Pre-Design Meeting date:* \_\_\_\_\_

*Submittal date:* \_\_\_\_\_

*ARC Meeting date:* \_\_\_\_\_

## Schematic Design Review Requirements

The deadline for Schematic Design Review submittals is two (2) weeks prior to the ARC meeting. ARC meetings are held each Wednesday unless there is no business. Any submittals you intend to present and have reviewed need to be submitted to the ARC office, and accepted as complete, no later than two weeks prior to the scheduled meeting. Checks for the applicable fees and deposits must accompany all submittals. ALL submittals will be reviewed for completeness when received. Incomplete submittals will NOT be accepted for review. Design professionals are requested to present the schematic plan to the ARC at the Schematic Design Review meeting.

### The following items are required to be submitted via email for the Schematic Design Review:

- A scanned PDF of the completed Schematic Design Review Form
- PDFs of the entire submittal package, including all required drawings and documents.
- All drawings must be compiled into a single PDF document.

Email the PDFs to the following email address: [carol@brooksresources.com](mailto:carol@brooksresources.com)

- In lieu of emailing the above items, a USB flash drive containing all of the required drawings and documents may be delivered to The Tree Farm ARC c/o Brooks Resources, 409 NW Franklin Ave. Bend, OR 97703.

The applicant must also mail or deliver the following to The Tree Farm ARC c/o Brooks Resources, 409 NW Franklin Ave. Bend, OR 97703:

- A copy of the completed Schematic Design Review Form.
- Two (2) full-sized hard copies of the entire submittal package (max. sheet size 30" x 42", 24"x36" is preferred).
- One (1) hard copy of the entire submittal package in an 11x17 landscape format at a legible scale.
- One check to cover the required Design Review Fees and a second check to cover the refundable deposit, both made payable to The Tree Farm HOA

## Schematic Design Review Requirements and Checklist

The following plans, drawings, documents, and site staking are required for a Schematic Design Review submittal (include this completed check list with schematic application):

### SITE PLAN

- \_\_\_ Drawing Scale (no smaller than 1" = 20')
- \_\_\_ North Arrow
- \_\_\_ Property boundaries, setbacks, and all easements
- \_\_\_ Surveyed site topography at one foot intervals stamped and signed by an Oregon Licensed Civil Engineer or Land Surveyor
- \_\_\_ Proposed grade changes at one foot intervals
- \_\_\_ The location, type, and size of all trees 8" and larger at DBH on the site with a clear indication of the trees that are to be removed
- \_\_\_ Rock outcroppings
- \_\_\_ Utility and septic stub locations and routing
- \_\_\_ Building footprint(s)
- \_\_\_ Proposed grade elevation of the first floor of all structures
- \_\_\_ Grade elevations of the major corners of the foundation in relationship to existing grade
- \_\_\_ Roof overhangs
- \_\_\_ Highest ridge elevation in relationship to existing grade
- \_\_\_ Site improvements
- \_\_\_ Driveway and parking areas
- \_\_\_ Walkways
- \_\_\_ Courtyards
- \_\_\_ Decks, patios, terraces

- \_\_\_ Firepits, fireplaces, and built in BBQs
- \_\_\_ Spa/hot tub facilities (to include screening)
- \_\_\_ Rockery walls and retaining walls with an indication of height and materials
- \_\_\_ Service yards, fences
- \_\_\_ Lot Coverage Summary
- \_\_\_ Total lot area
- \_\_\_ Percentage of lot coverage

**SEPTIC SITE AND DRAIN FIELD LOCATIONS**

- \_\_\_ Primary Septic Site and Drain Field Location
- \_\_\_ Replacement System Location

**CONSTRUCTION AREA PLAN**

- \_\_\_ The Site Plan is to serve as the base for this plan
- \_\_\_ Drawing Scale (recommended: 1" = 10')
- \_\_\_ North Arrow
- \_\_\_ Define the general location of the Construction Area (See Section 8.1 for details)

**FLOOR PLANS**

- \_\_\_ Drawing Scale: 1/4" = 1' or a scale that is legible in the format submitted
- \_\_\_ North Arrow
- \_\_\_ Square footage of each floor level
- \_\_\_ Building floor plans must be shown in their correct orientation
- \_\_\_ Firepits, fireplaces, and built in BBQs

**BUILDING ELEVATIONS**

- \_\_\_ Drawing Scale: match scale used for the floor plans
- \_\_\_ All exterior components, features, and materials clearly identified
- \_\_\_ Elevation of the highest point of the roof ridge in relation to the existing grade noted on each building elevation
- \_\_\_ Accurate existing and proposed grades drawn and noted on each building elevation
- \_\_\_ Each building elevation must be shown in their correct orientation

**SITE STAKING**

- \_\_\_ String setback line only where it is within 20 feet of a structure/improvement
- \_\_\_ String layout of the corners of the foundations of the dwelling, accessory structures, decks patios, terraces, retaining walls, rockery walls, and any other site improvements required to be built within the Building Envelope
- \_\_\_ Stake out driveway

**LANDSCAPE PLAN (CONCEPTUAL)**

- \_\_\_ Drawing Scale (recommended: 1" = 10')
- \_\_\_ North Arrow
- \_\_\_ Demonstration of defensible landscape zones 1, 2, and 3 as they relate to the building footprints (See Appendix B)
- \_\_\_ Reminder: Zone 1 encircles all structures and all attachments (decks, patios, fences)
- \_\_\_ Landscape plan shall be submitted in color