

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

- 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
- ___ Existing and finished grade elevation call-outs of the major corners of the foundation must be noted on the site plan
- ___ 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)

- ___ The plan design, plant legend and zone page must be submitted in color
- ___ 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)