Planned Unit Development, Tentative Plan

9.8300 Purpose of Planned Unit Development. The planned unit development (PUD) provisions are designed to provide a high degree of flexibility in the design of the site and the mix of land uses, potential environmental impacts, and are intended to:

. (1) Create a sustainable environment that includes:

- (a) Shared use of services and facilities.
- (b) A compatible mix of land uses that encourage alternatives to the use of the automobile.
- (c) A variety of dwelling types that help meet the needs of all income groups in the community.
- (d) Preservation of existing natural resources and the opportunity to enhance habitat areas.
- (e) Clustering of residential dwellings to achieve energy and resource conservation while also achieving the planned density for the site.
- . (2) Create comprehensive site plans for `geographic areas of sufficient size to provide developments at least equal in quality to those that are achieved through the traditional lot by lot development and that are reasonably compatible with the surrounding area.

(Section 9.8300, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02.)

9.8305 Applicability. PUD provisions shall be applied when any of the following conditions exist:

. (1) The proposal is subject to review and approval through the PUD process according to an adopted refinement plan, including but not limited to, property within the boundary of the South Hills Study where all or a portion of a

development site is:

- (a) Between an elevation of 500 feet and 701 feet, and the development site is at least 4 acres with areas of the development site containing slopes that exceed 20%.
- (b) On property above 701 feet in elevation, except partitions that do not include the creation of a public street, unless an alternate review procedure is approved pursuant to EC 9.9630(3)(a).
- (c) Above an elevation of 900 feet, except for a land division undertaken by or on behalf of a governmental entity in order to preserve, manage, or expand park, open space, or natural resource areas.
- (2) The property is zoned with a /PD overlay zone.
- . (3) One or more land uses proposed for the site are subject to review and approval through the PUD process according to the zoning.
- . (4) When requested by the property owner.

No development permit shall be issued by the city prior to approval of the final PUD.

(Section 9.8305, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02.)

9.8310 Tentative Planned Unit Development General Application Requirements. (1) Ownership. The area included in a proposed PUD shall either be under single ownership or common development control. The application shall

include all contiguous property under the same ownership or development control, shall be signed by the owner of the property, and include such related information as prescribed by the planning director. Otherwise contiguous 9.8-49 1/12/2011

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parcels that are separated only by a public right-of-way, shall be included in the PUD application unless the public right-of-way is designated an arterial or collector on the street classification map. If otherwise contiguous parcels are separated by an arterial or collector street, the applicant may, at the applicant's discretion, include those parcels in the PUD application.

- . (2) Project Coordinator and Professional Design Team. The tentative PUD application shall identify the PUD project coordinator and the professional design team and certify compliance with the following:
 - (a) Project Coordinator. The project coordinator shall:
- 1. Be the liaison between the applicant and the city.
- 2. Ensure that the required plans are prepared and executed according to any required conditions.
- 3. Either be a member of the American Institute of Certified Planners or licensed in the state of Oregon to practice architecture, civil engineering, or landscape architecture.
 - The project coordinator, or at least one design team member, shall attend all public meetings at which the proposal is discussed.
 - (b) Professional Design Team Designation. Unless waived by the planning director, the professional design team shall consist of at least the following professionals:
- 1. Oregon licensed arborist.

- 2. Oregon licensed architect.
- 3. Oregon licensed civil engineer.
- 4. Oregon licensed landscape architect.
- 5. Oregon licensed land surveyor.
 - (c) Plan Certification. Certification of the services of the professionals responsible for particular drawings shall appear on those drawings. To ensure comprehensive review of all plans for compliance with the PUD provisions by the professional design team, the cover sheet shall contain a statement of review endorsed with the signatures of all designated members of the professional design team stating that the portion of the project in which he or she was involved complies with the following:
- 1. Meets the standards of his or her profession.
- 2. Complies with the tentative PUD criteria.
- (3) Phasing. The tentative PUD application shall include a phasing plan that indicates any proposed phases for development, including the boundaries and sequencing of each phase. Phasing shall progress in a sequence that promotes street connectivity between the various phases of the development and accommodates other required public improvements.
- . (4) **Density.** Dwelling unit densities for PUDs shall be consistent with Table 9.2750 Residential Zone Development Standards. The calculation of the number of dwelling units allowed shall be determined based on the following:
 - (a) Easement Calculations. If it is demonstrated that easements will benefit residents of the proposed

PUD, residential density calculations may include areas in easements, with the exception of private streets or ingress/egress easements.

(b) Dedications. If it is demonstrated that lands dedicated to the city will benefit residents of the proposed PUD, residential density calculations may include areas dedicated to the public for recreation or open space.

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(c) Cumulative Density. When final plans are to be approved in phases, at no time shall the cumulative residential density exceed the overall density per acre established at the time of tentative plan approval.

(5) Needed Housing. If the proposal includes needed housing, as defined by State statutes, the written statement submitted with the PUD application shall clearly state whether the applicant is electing to use the general approval criteria in EC 9.8320 Tentative Planned Unit Development Approval Criteria- General instead of the approval criteria found in EC 9.8325 Tentative Planned Unit Development Approval Criteria- Needed Housing.

(Section 9.8310, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02; amended by Ordinance No. 20353, enacted November 28, 2005, effective January 1, 2006.)

9.8320 Tentative Planned Unit Development Approval Criteria- General. The hearings official shall approve, approve with conditions, or deny a tentative PUD application with findings and conclusions. Decisions approving an application, or approving with conditions shall be based on compliance with the following criteria:

. (1) The PUD is consistent with applicable adopted policies of

the Metro Plan.

- . (2) The PUD is consistent with applicable adopted refinement plan policies.
- . (3) The PUD will provide adequate screening from surrounding properties including, but not limited to, anticipated building locations, bulk, and height.
- . (4) The PUD is designed and sited to minimize impacts to the natural environment by addressing the following:
- (a) Protection of Natural Features.
- 1. For areas not included on the City's acknowledged Goal 5 inventory, the preservation of significant natural features to the greatest degree attainable or feasible, including:
- a. Significant on-site vegetation, including rare plants (those that are proposed for listing or are listed under State or Federal law), and native plant communities.
- All documented habitat for all rare animal species (those that are proposed for listing or are listed under State or Federal law).
- c. Prominent topographic features, such as ridgelines and rock outcrops.
- d. Wetlands, intermittent and perennial stream corridors, and riparian areas.
- e. Natural resource areas designated in the Metro Plan diagram as "Natural Resource" and areas identified in any city-adopted natural resource inventory.
- 2. For areas included on the City's acknowledged Goal 5 inventory:
- a. The proposed development's general design and character,

including but not limited to anticipated building locations, bulk and height, location and distribution of recreation space, parking, roads, access and other uses, will:

- . (1) Avoid unnecessary disruption or removal of attractive natural features and vegetation, and
- . (2) Avoid conversion of natural resource areas designated in the Metropolitan Area General Plan to urban uses when alternative locations on the property are suitable for development as otherwise permitted.

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b. Proposed buildings, road, and other uses are designed and sited to assure preservation of significant on-site vegetation, topographic features, and other unique and worthwhile natural features, and to prevent soil erosion or flood hazard.

- (b) Tree Preservation. The proposed project shall be designed and sited to preserve significant trees to the greatest degree attainable or feasible, with trees having the following characteristics given the highest priority for preservation:
- 1. Healthy trees that have a reasonable chance of survival considering the base zone or special area zone designation and other applicable approval criteria;
- Trees located within vegetated corridors and stands rather than individual isolated trees subject to windthrow;
- 3. Trees that fulfill a screening function, provide relief from

glare, or shade expansive areas of pavement;

- 4. Trees that provide a buffer between potentially incompatible land uses;
- 5. Trees located along the perimeter of the lot(s) and within building setback areas;
- 6. Trees and stands of trees located along ridgelines and within view corridors;
- 7. Trees with significant habitat value;
- 8. Trees adjacent to public parks, open space and streets;
- 9. Trees located along a water feature;
- 10. Heritage trees.
- . (c) Restoration or Replacement.
- For areas not included on the city's acknowledged Goal 5 inventory, the proposal mitigates, to the greatest degree attainable or feasible, the loss of significant natural features described in criteria (a) and (b) above, through the restoration or replacement of natural features such as:
- a. Planting of replacement trees within common areas; or
- b. Re-vegetation of slopes, ridgelines, and stream corridors; or
- c. Restoration of fish and wildlife habitat, native plant habitat, wetland areas, and riparian vegetation.
- 2. To the extent applicable, restoration or replacement shall be in compliance with the planting and replacement

standards of EC 6.320.

- For areas included on the city's acknowledged Goal 5 inventory, any loss of significant natural features described in criteria (a) and (b) above shall be consistent with the acknowledged level of protection for the features.
- . (d) Street Trees. If the proposal includes removal of any street tree(s), removal of those street tree(s) has been approved, or approved with conditions according to the process at EC 6.305.

(5) The PUD provides safe and adequate transportation systems through compliance with the following: (a) EC 9.6800 through EC 9.6875 Standards for Streets, Alleys, and Other

Public Ways (not subject to modifications set forth in subsection (11) below).

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- . (b) Pedestrian, bicycle and transit circulation, including related facilities, as needed among buildings and related uses on the development site, as well as to adjacent and nearby residential areas, transit stops, neighborhood activity centers, office parks, and industrial parks, provided the city makes findings to demonstrate consistency with constitutional requirements. "Nearby" means uses within 1/4 mile that can reasonably be expected to be used by pedestrians, and uses within 2 miles that can reasonably be expected to be used by bicyclists.
- . (c) The provisions of the Traffic Impact Analysis Review of EC 9.8650 through 9.8680 where applicable.
- . (6) The PUD will not be a significant risk to public health and

safety, including but not limited to soil erosion, slope failure, stormwater or flood hazard, or an impediment to emergency response.

- (7) Adequate public facilities and services are available to the site, or if public services and facilities are not presently available, the applicant demonstrates that the services and facilities will be available prior to need. Demonstration of future availability requires evidence of at least one of the following:
 - (a) Prior written commitment of public funds by the appropriate public agencies.
 - (b) Prior acceptance by the appropriate public agency of a written commitment by the applicant or other party to provide private services and facilities.
 - (c) A written commitment by the applicant or other party to provide for offsetting all added public costs or early commitment of public funds made necessary by development, submitted on a form acceptable to the city manager.
- . (8) Residents of the PUD will have sufficient usable recreation area and open space that is convenient and safely accessible.
- . (9) Stormwater runoff from the PUD will not create significant negative impacts on natural drainage courses either on-site or downstream, including, but not limited to, erosion, scouring, turbidity, or transport of sediment due to increased peak flows or velocity.
- (10) Lots proposed for development with one-family detached dwellings shall comply with EC 9.2790 Solar Lot Standards or as modified according to subsection (11) below.
- (11) The PUD complies with all of the following:

- (a) EC 9.2000 through 9.3915 regarding lot dimensions and density requirements for the subject zone.
 Within the /WR Water Resources Conservation Overlay Zone or /WQ Water Quality Overlay Zone, no new lot may be created if more than 33% of the lot, as created, would be occupied by either:
- 1. The combined area of the /WR conservation setback and any portion of the Goal 5 Water Resource Site that extends landward beyond the conservation setback; or
- 2. The /WQ Management Area.
 - (b) EC 9.6500 through EC 9.6505 Public Improvement Standards.
 - (c) EC 9.6706 Development in Flood Plains through EC
 9.6709 Special Flood Hazard Areas Standards.
 - (d) EC 9.6710 Geological and Geotechnical Analysis.
 - (e) EC 9.6730 Pedestrian Circulation On-Site.

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- . (f) EC 9.6735 Public Access Required.
- . (g) EC 9.6750 Special Setback Standards.
- . (h) EC 9.6775 Underground Utilities.
- (i) EC 9.6780 Vision Clearance Area.
- (j) EC 9.6791 through 9.6797 regarding stormwater destination, pollution reduction, flow control for headwaters area, oil control, source control, easements,

and operation and maintenance.

 (k) All other applicable development standards for features explicitly included in the application except where the applicant has shown that a proposed noncompliance is consistent with the purposes set out in EC 9.8300 Purpose of Planned Unit Development.

An approved adjustment to a standard pursuant to the provisions beginning at

EC 9.8015 of this land use code constitutes compliance with the standard.

- . (12) The proposed development shall have minimal off-site impacts, including such impacts as traffic, noise, stormwater runoff and environmental quality.
- . (13) The proposed development shall be reasonably compatible and harmonious with adjacent and nearby land uses.
- . (14) If the tentative PUD application proposes a land division, nothing in the approval of the tentative application exempts future land divisions from compliance with state or local surveying requirements.
- (15) If the proposed PUD is located within a special area zone, the applicant shall demonstrate that the proposal is consistent with the purpose(s) of the special area zone.
- (16) For property with the /SR Site Review Overlay Zone, the PUD complies with any additional site-specific criteria that were specified at the time the /SR designation was applied to the property.

(Section 9.8320, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02; amended by Ordinance No. 20266, enacted November 12, 2002, effective December 12, 2002; amended by Ordinance No. 20351, enacted November 14, 2005, effective January 1, 2006; by

Ordinance No. 20353, enacted November 28, 2005, effective January 1, 2006; by Ordinance No. 20369, enacted June 14, 2006, effective July 14, 2006; amended by Ordinance No. 20417, enacted August 11, 2008, effective July 7, 2009; amended by Ordinance 20430, enacted March 9, 2009, effective June 10, 2009.)

9.8325 Tentative Planned Unit Development Approval Criteria - Needed Housing. The hearings official shall approve, conditionally approve, or deny the PUD application with findings and conclusions. Unless the applicant elects to use the general criteria contained in EC 9.8320 Tentative Planned Unit Development Approval Criteria - General, where the applicant proposes needed housing, as defined by the State statutes, the hearings official shall approve or approve with conditions a PUD

based on compliance with the following criteria:

- . (1) The applicant has demonstrated that the proposed housing is needed housing as defined by State statutes.
- . (2) The proposed land uses and densities within the PUD are consistent with the land use designation(s) shown on the Metro Plan Land Use Diagram, as refined in any applicable refinement plan.
- (3) The PUD provides a buffer area between the proposed development and surrounding properties by providing at least a 30 foot wide landscape area along the perimeter of the PUD according to EC 9.6210(7).
- . (4) For areas not included on the city's acknowledged Goal 5 inventory, the PUD preserves existing natural resources by compliance with all of the following:

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- (a) The provisions of EC 9.6880 to EC 9.6885 Tree Preservation and Removal Standards, (not subject to modifications set forth in subsection (11) below).
- . (b) Natural resource areas designated on the Metro Plan diagram as "Natural Resource" are protected.
- . (5) There shall be no proposed grading on portions of the development site that meet or exceed 20% slope.
- . (6) The PUD provides safe and adequate transportation systems through compliance with all of the following:
 - (a) EC 9.6800 through EC 9.6875 Standards for Streets, Alleys, and Other Public Ways (not subject to modifications set forth in subsection (11) below).
 - (b) Provision of pedestrian, bicycle and transit circulation among buildings located within the development site, as well as to adjacent and nearby residential areas, transit stops, neighborhood activity centers, office parks, and industrial parks, provided the city makes findings to demonstrate consistency with constitutional requirements. "Nearby" means uses within 1/4 mile that can reasonably be expected to be used by pedestrians, and uses within 2 miles that can reasonably be expected to be used by bicyclists.
 - (c) The street layout of the proposed PUD shall disperse motor vehicle traffic onto more than one public local street when the PUD exceeds 19 lots or when the sum of proposed PUD lots and the existing lots utilizing a local street as the single means of ingress and egress exceeds 19.
- . (7) The PUD complies with all of the following:
 - (a) EC 9.2000 through 9.3915 regarding lot dimensions and density requirements for the subject zone.
 Within the /WR Water Resources Conservation

Overlay Zone or /WQ Water Quality Overlay Zone, no new lot may be created if more than 33% of the lot, as created, would be occupied by either:

- 1. The combined area of the /WR conservation setback and any portion of the Goal 5 Water Resource Site that extends landward beyond the conservation setback; or
- 2. The /WQ Management Area.
 - (b) EC 9.6500 through 9.6505 Public Improvement Standards.
 - (c) EC 9.6706 Development in Flood Plains through EC9.6709 Special Flood Hazard Areas Standards.
 - (d) EC 9.6710(6) Geological and Geotechnical Analysis.
 - (e) EC 9.6730 Pedestrian Circulation On-Site.
 - (f) EC 9.6735 Public Access Required.
 - (g) EC 9.6750 Special Setback Standards.
 - (h) EC 9.6775 Underground Utilities.
 - (i) EC 9.6780 Vision Clearance Area.
 - (j) EC 9.6791 through 9.6797 regarding stormwater destination, pollution reduction, flow control for headwaters area, oil control, source control, easements, and operation and maintenance.

An approved adjustment to a standard pursuant to the provisions beginning at EC 9.8015 of this land use code constitutes compliance with the standard.

(8) The applicant has demonstrated that wastewater service, transportation service, stormwater service, water service, and electrical service will be

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provided to the site prior to the need for those facilities and services. Where the facility or service is not already serving the site, this demonstration requires evidence of at least one of the following:

- . (a) Prior written commitment of public funds by the appropriate public agencies.
- (b) Prior acceptance by the appropriate public agency of a written commitment by the applicant or other party to provide private services and facilities.
- . (c) A written commitment by the applicant or other party to provide for offsetting all added public costs or early commitment of public funds made necessary by development, submitted on a form acceptable to the city manager.
 - (9) All proposed dwellings within the PUD are within 1/4 mile radius (measured from any point along the perimeter of the development site) of an accessible recreation area or open space that is at least 1 acre in size and will be available to residents.
- (10) Lots proposed for development with one-family detached dwellings shall comply with EC 9.2790 Solar Lot Standards (these standards may be modified as set forth in subsection (11) below).
 - (11) The PUD complies with all applicable development standards explicitly addressed in the application except where the applicant has shown that a modification is consistent with the purposes as set out in EC 9.8300

Purpose of Planned Unit Development.

- (12) For any PUD located within or partially within the boundaries of the South Hills Study, the following additional approval criteria apply:
 - (a) No development shall occur on land above an elevation of 900 feet except that one dwelling may be built on any lot in existence as of August 1, 2001.
 - (b) Development shall be setback at least 300 feet from the ridgeline unless there is a determination by the city manager that the area is not needed as a connection to the city's ridgeline trail system. For purposes of this section, the ridgeline trail shall be considered as the line indicated as being the urban growth boundary within the South Hills Study plan area.
 - (c) Development shall cluster buildings in an arrangement that results in at least 40% of the development site being retained in 3 or fewer contiguous common open space areas. For purposes of this section, the term contiguous open space means open space that is uninterrupted by buildings, structures, streets, or other improvements.
 - (d) Residential density is limited as follows:
- 1. In the area west of Friendly Street, the maximum level of new development per gross acre shall be 8 units per acre.
- 2. In the area east of Friendly Street, the maximum level of new development per gross acre shall be limited to 5 units per acre.
- 3. Housing developed as Controlled Income and Rent Housing shall be exempt from the density

limitations in subsections 1 and 2 above, but are subject to the other applicable development standards and review procedures.

. (13) Stormwater runoff from the PUD will not damage natural drainage courses either on-site or downstream by eroding or scouring the natural drainage courses or by causing turbidity, or the transport of sediment due to increased

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peak flows or velocity.

(Section 9.8325, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02; administratively corrected April 18, 2003; amended by Ordinance No. 20297, enacted August 11, 2003, effective September 10, 2003; administratively corrected August 13, 2003; amended by Ordinance No. 20351, enacted November 14, 2005, effective January 1, 2006; by Ordinance No. 20353, enacted November 28, 2005, effective January 1, 2006; Ordinance No. 20369, enacted June 14, 2006, effective July 14, 2006; and amended by Ordinance 20430, enacted March 9, 2009, effective June 10, 2009.)

9.8330 Site Alteration. Unless specifically permitted by the hearings official, vegetation, topography, and other natural features of areas proposed for a PUD shall not be substantially altered until final PUD approval, and then only as authorized by the final PUD approval. "Substantially altered" includes, but is not limited to, site grading and removal of trees or other vegetation. If a subdivision is required, site alteration shall not be permitted until after tentative subdivision approval is granted.

(Section 9.8330, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02.)

9.8335 Modifications to Approved Tentative Planned Unit Development. The applicant may apply for a modification of the approved PUD tentative plan following the Type II process. The planning director shall approve the request only if it complies with the following criteria:

- . (1) The proposed modification is consistent with the conditions of the original approval.
- . (2) The proposed modification will result in insignificant changes in the physical appearance of the development, the use of the site, and impact on the surrounding properties.

If the planning director determines that the proposed modification is not consistent with the above criteria, the proposed modification may not occur. Nothing in this section shall preclude the applicant from initially submitting the requested modification as a new tentative PUD application.

(Section 9.8335 added by Ordinance No. 20353, enacted November 28, 2005, effective January 1, 2006.

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Planned Unit Development, Final Plan

9.8350 Purpose of Planned Unit Development, Final Plan. The PUD process includes both a tentative and final plan. Final plan approval is required primarily to ensure that tentative plan approval conditions have been met.

(Section 9.8350, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02.)

9.8355 Applicability. A final PUD plan is required for every approved tentative PUD, and every phase of a tentative PUD.

(Section 9.8355, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02.)

9.8360 Planned Unit Development, Final Plan Application Requirements. In addition to the provisions in EC 9.7010 Application Filing, the following specific requirements apply to PUD final plan applications:

- . (1) Applications shall contain final maps and supplemental materials required to demonstrate compliance with tentative plan conditions of approval.
- (2) Final PUD plans may be submitted in phases, if such phases were approved as part of the tentative PUD consideration. The boundaries of each phase of the final PUD plans shall coincide with the boundaries of the phasing areas approved at the tentative plan stage. Requests to extend the time frame for a specific phase shall be subject to EC 9.7340 Expiration.
- . (3) Individual phases of a PUD may not be submitted for final PUD review until the boundaries of the phases are legal lots as defined in this land use code, and documents necessary to assure permanent maintenance, at no expense to the city, of buildings, common use facilities, landscaping, open space, and outdoor living areas have been executed and recorded.
- . (4) When a PUD or any phase thereof is submitted for final approval, each design team member shall provide written certification that the portion of the project in which he or she was involved continues to comply with the approved tentative plan conditions of approval.
- . (5) Public improvements as required by this land use code or as a condition of tentative plan approval have been completed, or:
 - (a) A performance bond or suitable substitute as agreed upon by the city has been filed with the city finance officer in an amount sufficient to assure the completion of all required public improvements; or

(b) A petition for public improvements and for the assessment of the real property for the improvements has been signed by the property owner seeking the subdivision, and the petition has been accepted by the city engineer.

(Section 9.8360, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02.)

9.8365 Final Planned Unit Development Approval Criteria.

The planning director shall approve, approve with conditions, or deny a final PUD application. Approval shall include a finding that the final PUD plan conforms with the approved tentative PUD plan and all conditions attached thereto.

(Section 9.8365, see chart at front of Chapter 9 for legislative history from 2/26/01 to 6/1/02.)

9.8370 Modifications to Approved Planned Unit

Development. The applicant for the original PUD may apply for a modification of the final PUD approval following the

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Type II process. The planning director shall approve the request only if it complies with the following criteria:

- . (1) The proposed modification is consistent with the conditions of the original approval.
- . (2) The proposed modification will result in insignificant changes in the physical appearance of the development, the use of the site, and impact on the surrounding properties.

If the planning director determines that the proposed modification

is not consistent with the above criteria, the proposed modification may not occur unless a new tentative PUD application is submitted based on the Type III procedural requirements. Nothing in this section shall preclude the applicant from initially submitting the requested modification as a new tentative PUD application.

(Section 9.8370, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02.)

9.8375 Final Planned Unit Development - Landscaping. If required landscaping cannot be completed prior to occupancy, or as otherwise required as a condition of approval, the planning director may require the applicant to post a performance bond in an amount and for a time period determined by the planning director to be sufficient to assure timely completion.

(Section 9.8375, see chart at front of Chapter 9 for legislative history from 2/26/01 through 6/1/02.)