# Council Business Meeting Agenda

**ASHLAND CITY COUNCIL**

**BUSINESS MEETING AGENDA**

**Tuesday, April 15, 2025**

**Council Chambers, 1175 E Main Street**

**Live stream via rvtv.sou.edu select RVTV Prime.**

HELD HYBRID (In-Person or Zoom Meeting Access) To attend via Zoom, you must register by contacting the City Recorder no later than 10 a.m. the day of the meeting.

Public testimony will be accepted for both general public forum items and agenda items.

If you would like to submit written testimony or if you wish to speak electronically during the meeting, **complete the online Public Testimony Form no later than 10 a.m. the day of the meeting.**

**6:00 p.m. Regular Business Meeting**

**I. CALL TO ORDER**

a. Land Acknowledgement**

**II. PLEDGE OF ALLEGIANCE**

**III. ROLL CALL**

**IV. MAYOR'S / CHAIR OF THE COUNCIL ANNOUNCEMENT**

**V. APPROVAL OF MINUTES**

a. Minutes of the March 31, 2025 – Study Session Meeting

b. Minutes of the April 1, 2025 - Business Meeting

**VI. CONSENT AGENDA**

a. Budget Transfers and Budget Supplemental

**VII. SPECIAL PRESENTATIONS**

**VIII. PUBLIC FORUM**

15 minutes – Public input or comment on City business not included on the agenda

**IX. PUBLIC HEARING**

a. Public Hearing on 2025–2026 Community Development Block Grant (CDBG) Award and Action Plan

b. Public Hearing and Decision on the 2025-2029 Consolidated Plan for use of Community Development Block Grant Funds

**X. ORDINANCES, RESOLUTIONS AND CONTRACTS**

a. Second Reading of Ordinance 3259: "An Ordinance Annexing Property and Withdrawing an Annexed Area from Jackson County Fire District No. 5 (300 Clay Street)" and adoption of Findings and Conclusions of Law for Planning Action #PA-T3-2024-00010.

b. Resolutions related to Public Safety, Wildfire and Parks Fees

c. Second Reading ORD 3258 An Ordinance Amending AMC Chapter 10.30 to Prohibit Hazardous Fire Use

**XI. UNFINISHED BUSINESS**

a. 2025-2027 Transient Lodging Tax (TLT) Revenue Use for Tourism Promotion

b. Proposed Changes to Enhanced Law Enforcement Area Process

c. Water Cost of Service Study and Rate Study Final Draft Update

**XII. NEW BUSINESS**

**XIII. CITY MANAGER REPORT**

**XIV. OTHER BUSINESS FROM COUNCIL MEMBERS/REPORTS FROM COUNCIL LIAISONS**

**XV. ADJOURNMENT**

*If you need special assistance to participate in this meeting, please contact Alissa Kolodzinski at recorder@ashlandoregon.gov or 541.488.5307 (TTY phone number 1.800.735.2900). Notification at least three business days before the meeting will enable the City to make reasonable arrangements to ensure accessibility to the meeting in compliance with the Americans with Disabilities Act.*

* Items on the Agenda not considered due to time constraints are automatically continued to the next regularly scheduled Council meeting [AMC 2.04.030.(D)(3)]

**** LAND ACKNOWLEDGEMENT**
We acknowledge and honor the aboriginal people on whose ancestral homelands we work—the Ikirakutsum Band of the Shasta Nation, as well as the diverse and vibrant Native communities who make their home here today. We honor the first stewards in the Rogue Valley and the lands we love and depend on: Tribes with ancestral lands in and surrounding the geography of the Ashland Watershed include the original past, present and future indigenous inhabitants of the Shasta, Takelma, and Athabaskan people. We also recognize and acknowledge the Shasta village of K'wakhakha - "Where the Crow Lights" - that is now the Ashland City Plaza.

***Agendas and minutes for City of Ashland Council, Commission and Committee meetings may be found at the City website, ashlandoregon.gov.

**ASHLAND CITY COUNCIL**
**STUDY SESSION MINUTES**
**Monday, March 31, 2025**

Mayor Graham called the meeting to order at 5:30 p.m.

Council Present: Mayor Graham, Councilors Knauer, Dahle, DuQuenne, Hansen, and Kaplan. Bloom appeared via Zoom.
Council Absent: none
Staff Present:

| | |
|---|---|
| Sabrina Cotta | City Manager |
| Marianne Berry | Finance Director |
| Bryn Morrison | Deputy Finance Director |
| Alissa Kolodzinski | City Recorder |
| Rocky Houston | Parks Director |

I. **Public Input** - none

## II. Budget Background - City Accounting & Fund Structure

Berry and Morrison provided a presentation (see attached) as a first in a series of budget background study sessions to provide information on the City's budget process for the Citizens Budget Committee that will be convened beginning April 30, 2025.

- Dictated by Oregon Local Budget Law - ORS 294
- Timeline for budget process: April 30th – proposed budget to Budget Committee; May 14th – Committee approves budge; June 3, Council adopts budget.
- Fund balances represent the net position of a fund and will differ from cash balances because Ashland operates on a modified accrual basis of accounting: revenues and expenditures are booked in the year they are received or incurred.
- Monies cannot be transferred from one fund to another without legally supported reasons.
- Appropriated fund balances are allocated by Council to spend. Unappropriated fund balances are maintained with a calculated minimum reserve, depending on the fund, for emergencies.
- Restricted funds are legally bound in use, whereas committed funds have been carved out by Council for use but are not legally restricted.
- City funds include the general fund, special revenue funds, capital project funds, debt service fund, enterprise funds, internal services funds, and cemetery trust fund.
- Ashland's budget and staffing levels differ from other municipalities of similar population size because Ashland operates its own electric, water, wastewater, and internet services as well as its own fire department, wildfire division, and emergency medical transport services.
- The general reserve fund helps to stabilize the budget as it fluctuates and has grown in the last couple of years. Utilization of this fund is governed by fiscal policy and allocated through the biennial budget process. Various contingency funds are maintained for emergencies.

- Capital Improvement Project (CIP) funds are set by Council adoption of a six-year CIP plan for inclusion in the budget process. System Development Charges (SDC's) and any debt issuances are restricted to the fund for which they are assessed.
- The budget resolution is adopted by the Council and appropriates the general fund by department. Funds cannot be transferred between departments.
- The airport fund exists as its own special revenue fund.
- The bulk of the biennium budget are enterprise funds that require a 25% unappropriated ending fund balance in addition to contingency balances.

## III. Review City Assistance Programs for BN 25-27

Berry and Morrison provided a presentation on the proposed assistance program (see attached).

- Current programs include Ashland Low-Income Assistance Program (ALIEAP -based on income for December 1 through end of February or May and for electric only – must reapply annually), Senior/Disabled Utilities Discount (year-round program based on income for both electric, water, sewer, street user, and drain with no need to reapply), and Emergency Heat Assistance (once a year, based on income).
- Customers that qualify for the Senior/Disabled Discount automatically qualify for the ALIEAP discount in the wintertime and do not need to reapply.
- Based on the 2024 fiscal year, 517 total customers were utilizing the discount program, with an average savings of $360 for the Senior Discount and average of $206 for ALIEAP.
- The equivalent of one full-time position (FTE) is currently required to administer the programs.
- The proposed assistance program could include year-round assistance based on one of several proxies (OHP, SNAP, ALIEAP, or other), and eliminating the age requirement with a potential biennial budget of $573K ($490K for Electric and $83K for Water, Wastewater, and Streets). This represents an increase of $191K from the previous biennium.
- Council discussed various potential qualification criteria for the proposed assistance program.
- Staff proposed a pilot program with the City's current income qualifier threshold, application process opening each May, and offered year-round, starting July 1 at a 30% discount monthly (excluding internet). An additional $200 discount in the winter months is proposed for seniors currently enrolled so that they do not experience a reduction in benefit.
- Conservation funds come from rebates from the Bonneville Power Administration (BPA), if the City's assistance program is extended, new funding sources will be needed.
- Discussion on how to match the level of need equitably, how to administer, whether the benefit should be capped, to explore if partners are able to provide solid estimate of how many would qualify, and how to leverage partners to spread the word about the program in the future.
- Direction to staff is to bring back information on a program based on income level only, is as simple as possible, only discounts rates while retaining fees, considers a benefit cap, and to reach out to partners for potential data on number of households that would qualify.

## IV. Budget-Related Fees Discussion: Public Safety, Wildfire and Parks Fees

Cotta and Berry provided a presentation (see attached). Cities all over Oregon are grappling with budget shortfalls. Prior to this fee discussion, each of the City's general fund budgets have been

reviewed to reduce materials and services. Each department has cut approximately 5% from their budget, positions have been reviewed for possible consolidation or other increased efficiency, and no funding was included to address additional needs previously identified by departments. Cotta provided a fee comparison with neighboring municipalities and suggested service level expectations need to be reviewed. Ashland fees have not increased in many years and does not include a parks fee, whereas neighboring cities do. Ashland's Fire and EMS services are also different from other municipalities. Main general fund revenues are only expected to increase 1-3% for the next biennium as property taxes are capped at 3% per state law. Franchise fees have been impacted due to no rate increases, and the electric user tax (which operates more as a service fee because it goes into general fund) has only increased less than 1% in the last five years. Transient Lodging Tax revenues are down 12% since 2019, and grant revenues are expected to be reduced due to federal limits. Personnel costs are increasing at 15% which out paces the expected 3% revenue increase.

- The 15% increase is based on cost of living and healthcare increases and does not include overtime. The state-mandated Oregon Paid Leave program is expensive. Staff are exploring a third-party administrator to reduce this cost and to adjust staffing levels moving forward.
- Public Safey and AFR fees have not increased since 2018 and 2019 respectively, despite increased personnel costs. Parks operational costs have increased, which cannot be offset by food & beverage tax – which can only go towards capital improvements.

Cotta presented a proposal with alternatives for dedicated fees of priority programs for cost recovery:

- Staff proposed to return with a resolution for a public safety fee of $5.00 (currently $1.50) to transition the Single Role program from a pilot program to four permanent positions and four additional pilot positions to test and analyze additional data regarding cost recovery for the next biennium.
- Alternatives presented included:
    - $3.00 fee - maintain staffing levels of police and fire minus single role program.
    - $4.00 fee - transition to four single role positions from the current eight.
    - $6.00 fee - full single role pilot program becomes permanent while analyzing cost recovery moving forward.
- Discussion regarding acceptable service-level expectations, the difference between dual-role and single-role staff and the impacts of dropped calls which the single role program mitigates.
- Direction given to staff to build the budget and return with a resolution for a $5 public safety fee to begin July 1, 2025, with cost escalators for future adjustment.
- Staff proposed a Wildfire (AFR) fee of $6.00 (currently $3.00) to maintain existing model.
- Alternatives presented included:
    - No fee increase - transition from mitigation to education- a reduction in staff in year 2 of the biennium.
    - $4.00 fee - reduction in staffing from 2 to 1 FTE at the end of the biennium.
    - $5.00 fee - retain 2 FTE with minimal mitigation and focus on prevention education.
    - $7.00 fee - retain 2 FTE and continue mitigation work with potential to grow.
- Discussion regarding the pending Community Wildfire Prevention Plan (CWPP), previous grant funding for prior mitigation work, the potential for building a dedicated fund for wildfire

mitigation to relieve pressure from the general fund, the benefits of the wildfire division remaining within the fire department, maintenance within the watershed along with improved home-hardening, and the potential of a tiered fee based on neighborhood location.

- Direction given to staff to build a budget with a $7 wildfire fee with consideration for cost escalators for future adjustment with discussion of a tiered program to be taken up later.

Recess taken until 8:16PM

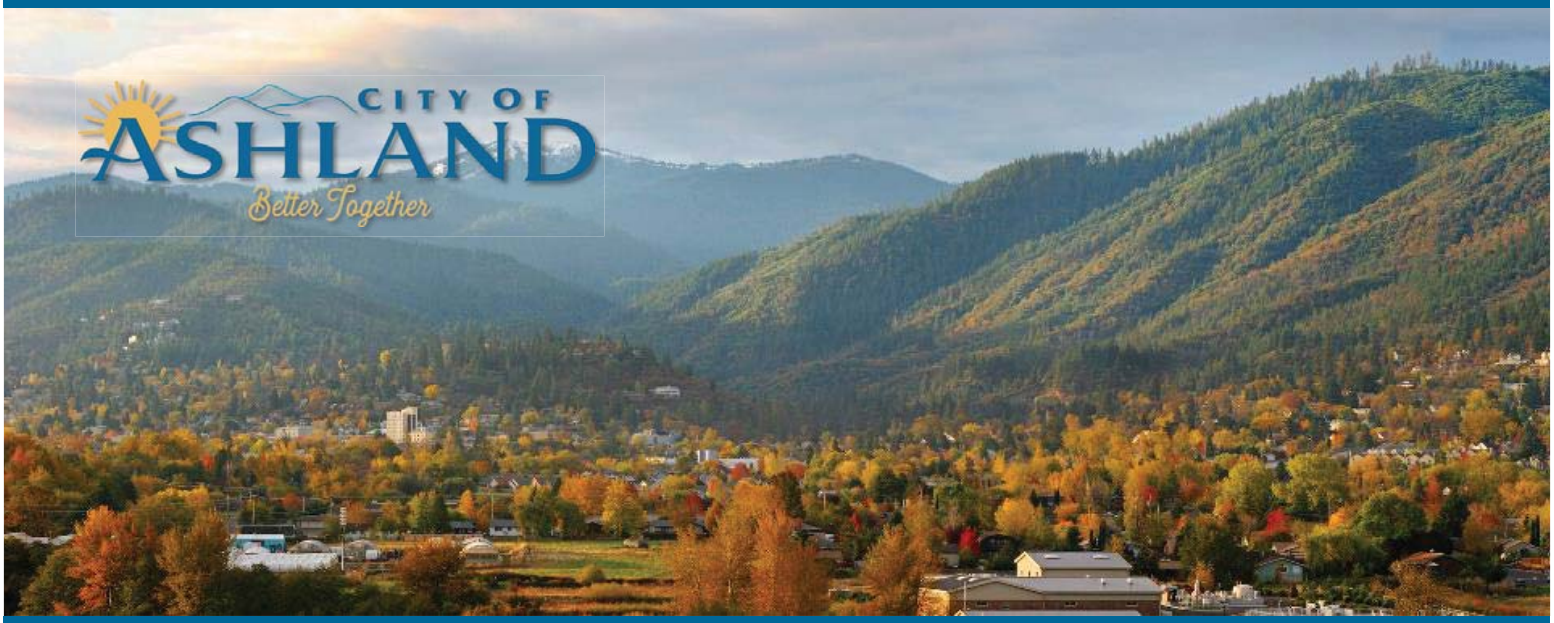
- Staff proposed a Parks fee of $5.00 (no current fee) to begin Jan 1st, 2026, to fund the current level of Parks maintenance and operations, staffing for East Main Park, and full staffing at Senior Center.
- Alternatives presented included:
    - No fee increase – reduction in parks maintenance, Senior Center services, and delay or cancelation of East Main Park with a return of grant funds.
    - $3.00 Fee – Maintain current parks maintenance levels only.
    - $4.00 Fee – Maintain current parks maintenance and Senior Center service levels.
    - $6.00 Fee – Maintains current parks and Senior Center with increase in service levels.
- Discussion of staffing for East Main Park, the cost of mitigating increased vandalism in parks restrooms, operational costs associated with Pioneer Hall and the Community Center, and what reduced services would look like.
- Discussion of parks as attracting families and providing economic development opportunities weighted against priorities for essential public safety services previously discussed.
- Discussion of divestment options for City and Parks properties to reduce maintenance costs. While the Parks department has had goals to increase land and trails, the focus moving forward will be to maintain what the City already has.
- Discussion of Parks user fees, potential for a ballot measure to allocate a portion of the Food and Beverage Tax to Parks, and how neighboring municipalities have adopted Parks fees.
- Parks Director Houston spoke of budget cuts already made and the current development of a Parks strategic plan that will engage public input to develop levels of service.
- Mayor Graham polled councilors regarding interest of the $5 Parks fee as presented:
    - Graham and three councilors are for; three councilors are against as presented.
- Direction given to staff to bring back more information about what aspects of the parks budget the $5 fee protects and what would be cut if the resolution does not pass.

## V. Adjournment of Study Session

The meeting was adjourned at 9:40 p.m.

City Recorder Alissa Kolodzinski

Mayor Tonya Graham




# Budget Background
# City Fund Structure

March 31, 2025

Finance

## Budget Process – Session Goals

- Understanding key concepts
  - Budget Framework
    - *Local Budget Law*
    - *City of Ashland specifics*
  - Fund Balance
  - Fund Types
    - *General Fund, Special Revenue, Capital Projects, Debt Service, Enterprise, Internal Service Funds*

Finance

## Budget Framework

- Oregon Local Budget Law
  - Citizens' Budget Committee
    - *Comprised of Mayor, 6 Council members, 7 Citizens*
    - *Meetings April 30, May 7, May 14, 2025*
  - City of Ashland Budget for BN 2025-2027
    - *Biennial budget 2023-25 = $385M*
    - *Proposed budget to Budget Committee* ➡ *April 30th*
    - *Committee approves budget* ➡ *May 14th*
    - *Council adopts budget* ➡ *June 3, 2025*

https://or-ashland.civicplus.com/225/Budget-Process-Resources



Finance

## Fund Balance

- Represents Net Position
  - Revenues less expenditures
    - *Modified Accrual Basis of Accounting*
    - *Fund Balance differs from Cash Balance*
  - Fund balance categories
    - *Restricted, Committed, Unappropriated*
  - Policies
    - *Minimum fund balance, contingency, other restrictions*

General Fund minimum unappropriated ending fund balance = $16.7% of average 3 years of expenditures

Enterprise Funds unappropriated = 25%

Finance

## Funds

- General Fund
- Special Revenue Funds

| | |
|---|---|
| Reserve Fund | Tourism Fund |
| Street Fund | Housing Fund |
| SDC Street Fund | Airport Fund |
| Community Dev Block Grant Fund | |

- Capital Project Funds

| | |
|---|---|
| Capital Improvement Fund | SDC Parks Fund |
| Parks Capital Improvement Fund | |



Finance

## Funds

Total of 23 Funds

- Debt Service Fund
- Enterprise Funds

| | |
|---|---|
| Water Fund | SDC Water Fund |
| Wastewater Fund | SDC Wastewater Fund |
| Storm Drain Fund | SDC Storm Drain Fund |
| Electric Fund | Telecommunications Fund |

- Internal Services Funds

| | |
|---|---|
| Insurance Services Fund | Equipment Fund |

- Cemetery Trust Fund

Finance

## General Fund Focus

- Revenues
  - Property Taxes
  - Franchise Fees
  - Electric User Tax
  - Ambulance
  - Transient Lodging Tax
  - Planning & Building
  - Interest Income
  - Parks Program Revenue
- Expenditures (generally by dept)
  - Administration
  - Finance
  - Innovation and Technology
  - Police Department
  - Fire and Rescue Department
  - Public Works Department
  - Community Development Dept
  - Parks Department



Finance

## Budget Takeaway's

- Reflected in Ashland's budget and FTE -
  - The City operates its own:
    - *Electric*
    - *Water*
    - *Wastewater*
    - *Internet services*
    - *Fire Department*
    - *Wildfire Division*
    - *Emergency Medical Transport (EMT) services*

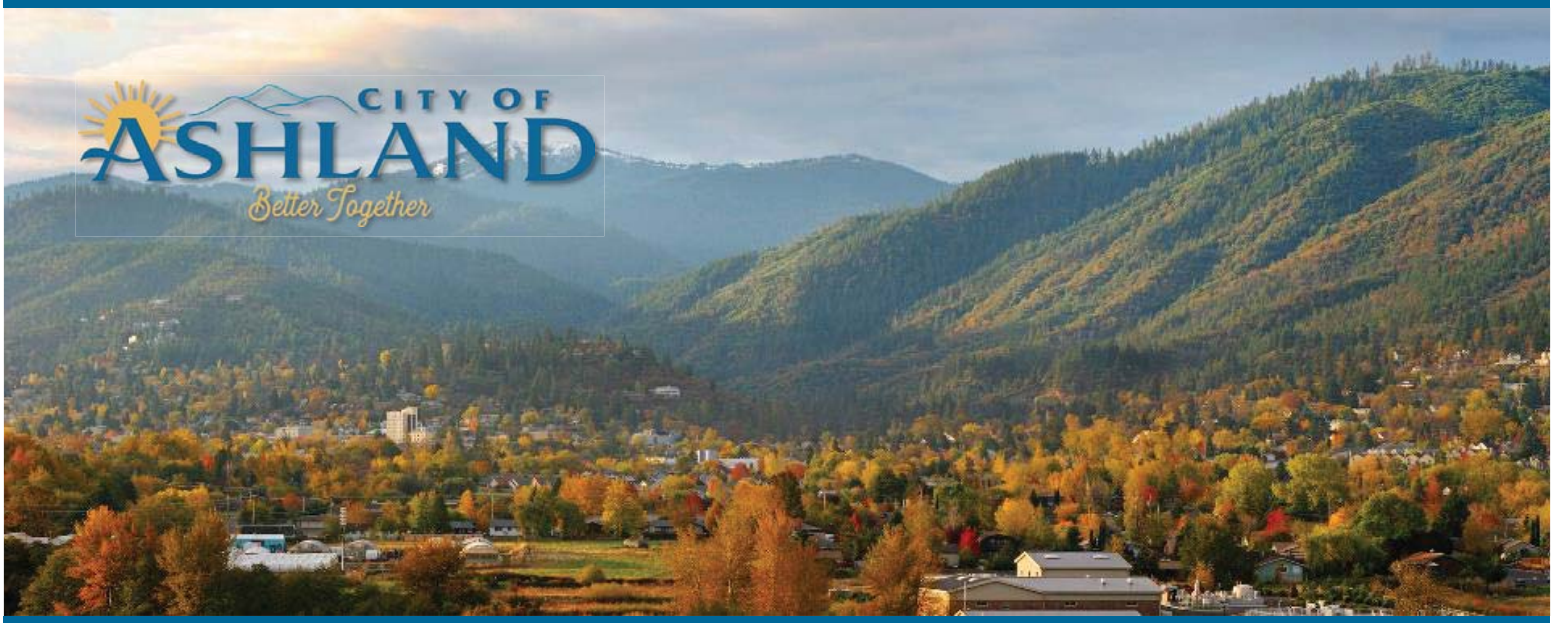
Finance

## Budget Takeaway's

- Budgeting by fund and by departments
  - Estimating revenues & expenditures
    - *Review historical data and input known information*
    - *Based on Council priorities*
    - *Evaluate expenditures and justified cost recovery methods*
    - *Best estimate based on above*
  - Fiscal policies
    - *City, Government Finance Officers Association (GFOA)*



QUESTIONS?




# Utility Assistance Program Update & Proposal

March 31, 2025

Finance

## Proposed Assistance Program

- Objectives
  - Expand the program
  - Mindful of the population that is currently being served
    - *Not taking away current benefits*
  - Stay within appropriate levels of funding
  - Mindful of administrative load on staff

Finance

# Current Utility Assistance Programs

- **Ashland Low-Income Assistance Program (ALIEAP)**
  - Assists low-income residents with 50% reduction of electric bill
    - *Based on 65% of Oregon median income (or 265% federal poverty level)*
    - *Discount December 1 through end of February or May*
    - *Maximum $300 credit*
- **Senior/Disable Utilities Discount**
  - 20% or 30% off electric, water, sewer, street user, storm drain
    - *Year-round discount for income-qualified persons age 65 or older, qualified disabled persons age 60 or older*
    - *Based on 125% and 100% below federal poverty level, respectively*
- **Emergency HEAT Assistance**
  - $100 toward past due balance, once per 12-month period
    - *150% below federal poverty level*



Finance

# Current Utility Assistance Programs

| City-funded Assistance Program | FY 2016 Actual | FY 2017 Actual | FY 2018 Actual | FY 2019 Actual | FY 2020 Actual | FY 2021 Actual | FY 2022 Actual | FY 2023 Actual | FY 2024 Actual |
|---|---|---|---|---|---|---|---|---|---|
| **Low Income Energy Assistance** | | | | | | | | | |
| Customers | 517 | 485 | 463 | 477 | 498 | 519 | 545 | 563 | 517 |
| Distributed | $ 88,012 | $ 87,083 | $ 86,614 | $ 84,253 | $ 91,656 | $ 109,310 | $ 112,626 | $ 97,470 | $ 106,740 |
| **Average relief/applicant-family** | **$ 170** | **$ 180** | **$ 187** | **$ 177** | **$ 184** | **$ 211** | **$ 207** | **$ 173** | **$ 206** |
| **Senior/Disabled Program** | | | | | | | | | |
| Customers | 165 | 174 | 181 | 195 | 216 | 237 | 263 | 281 | 281 |
| Distributed | $ 45,523 | $ 50,285 | $ 55,487 | $ 60,370 | $ 73,527 | $ 90,482 | $ 96,878 | $ 101,854 | $ 101,188 |
| **Average relief/applicant-family** | **$ 276** | **$ 289** | **$ 307** | **$ 310** | **$ 340** | **$ 382** | **$ 368** | **$ 362** | **$ 360** |

| Total Assistance Programs | FY 2016 Actual | FY 2017 Actual | FY 2018 Actual | FY 2019 Actual | FY 2020 Actual | FY 2021 Actual | FY 2022 Actual | FY 2023 Actual | FY 2024 Actual |
|---|---|---|---|---|---|---|---|---|---|
| **Distributed Amount** | | | | | | | | | |
| Low Income Energy Assistance | $ 88,012 | $ 87,083 | $ 86,614 | $ 84,253 | $ 91,656 | $ 109,310 | $ 112,626 | $ 97,470 | $ 106,740 |
| Senior/Disabled Program | 45,523 | 50,285 | 55,487 | 60,370 | 73,527 | 90,482 | 96,878 | 101,854 | 101,188 |
| Heat Program | 4,800 | 2,800 | 2,900 | 2,800 | 3,600 | 1,100 | 800 | 1,400 | 1,400 |
| **Total Distributed** | $ 138,335 | $ 140,168 | $ 145,001 | $ 147,423 | $ 168,783 | $ 200,892 | $ 210,304 | $ 200,724 | $ 209,328 |
| Budget | $ 149,500 | $ 149,500 | $ 156,000 | $ 159,120 | $ 160,038 | $ 160,038 | $ 190,700 | $ 190,700 | $ 190,700 |
| **% of Distributed/Budget** | **93%** | **94%** | **93%** | **93%** | **105%** | **126%** | **110%** | **105%** | **110%** |

Finance

## Current Utility Assistance Programs

- Customers served – based on FY24
  - Total 517 customers annually
  - Total annual budget $190,700
  - Total distributed $209,328
  - Average relief for Senior Discount $360
  - Average relief for ALIEAP $206
- Operational requirements
  - 1 FTE in Utility Billing Division



Finance

## Proposed Assistance Program

- New Program
  - Year-round assistance
  - Income qualifier, such as OHP, SNAP or other
  - Potential BN 25-27 Budget = $573K
    - Increase of $191K from BN 23-25
    - Breakdown: $490K Electric<br>$ 83K Water, Wastewater, Streets

Finance

## Proposed Assistance Program

- Considerations
  - OHP & SNAP are lower thresholds than City's current
    - OHP: 100% Federal Poverty level
      - *Income cannot exceed $1,255/month*
      - *Reaches only 50% of current ALIEAP customers*
    - SNAP: 200% Federal Poverty level
      - *Income cannot exceed $2,510 per month*
      - *Reaches 82% of current ALIEAP customers*
    - ALIEAP: 265% of Federal Poverty level
      - *income cannot exceed $3,323 per month*

* based on single person family



Finance

## Proposed Assistance Program

- Considerations
  - Averages
    - Average bill $96 a month
    - Average discount $358 a year, ~$30 a month
  - Breakdown of discounts received annually
    - 3% receive over $1,000
    - 15% receive $600-999

    95-105 customers
    - 81% receive $250-599 → 420-450 customers
  - Seniors
    - 48-55% are seniors

Finance

## Proposed Assistance Program

- Pilot Program
  - Income Qualifier: Current City's threshold
    - 265% Federal Poverty level
      - *Income cannot exceed $3,323/month*
  - Application process opens each May
    - Non-existing seniors apply May 1st
    - Year-round starting July 1st, received 30% discount monthly
      - *Excludes Internet*
      - *Applies to Public Safety & AFR Fees*
    - In order to not harm Seniors:
      - *On Dec 1st, automatic $200 discount for winter months*



Finance

## Proposed Assistance Program

- Pilot Program
  - Estimated Program Cost
    - *Within annual budget of $286K*
    - *Estimated assistance at approx. $256-$286K per year*
  - Will assess program metrics July 2025

✓ Expands program

✓ Considers current population served

✓ Maintains reasonable staff workload

✓ Stays within funding levels and/or be easily adjusted after Year 1

# QUESTIONS?

# Budget-Related Fee Discussion

March 31, 2025

Budget

**League of Oregon Cities**
6d ·

Local governments across Oregon are grappling with budget shortfalls, and the LOC is advocating for a review of the state's property tax laws. Lobbyist Jenna Jones emphasized the need for reform: "Our biggest thing is getting the legislature to help us convene the necessary people to start talking about [this]. What is the new property tax system that replaces the one that we currently have that is actually adequate, that's fair, that's equitable for local governments and for... **See more**

KATU.COM

**Facing multi-million-dollar shortfalls, local governments set eyes on OR property tax laws**

Budget

## Overview

- **Budget Process**
  - Reviewing and reconciling past biennium
  - Budget direction: No increase
  - Estimating Revenues & Expenditures- each department has reduced budget by ~5%
  - Assessing Program Priorities & Service Levels
    - Combining positions & moving where most needed
- **Reviewing increasing fees to match service level expectations**
  - Public Safety, currently $1.50 per electric meter
  - Wildfire, currently $3.00 per ¾ water meter
  - Parks, currently no fee



Budget

## Other Jurisdictions

| CITY COMPARATIVES | | Ashland | Medford | Central Pt. | Talent | Grants Pass |
|---|---|---|---|---|---|---|
| Population | | 22,086 | 84,423 | 19,918 | 5,228 | 39,112 |
| Fees | Public Safety | $ 1.50 | $ 16.07 | $ 2.00 | $ 4.00 | $ 12.36 |
| | Parks | 0.00 | 5.35 | 6.00 | 8.43 | 0.00 |
| | Wildfire | 3.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | $ 4.50 | $ 21.42 | $ 8.00 | $ 12.43 | $ 12.36 |
| Aurhotized FTE | | | | | | |
| | Police | 39.00 | 130.70 | *31.00* | 10.65 | 57.00 |
| | Fire | 47.00 | 108.20 | *0.00* | 0.00 | 31.00 |
| | Parks | 37.00 | 70.00 | *7.15* | *4.00* | 28.00 |
| | | 123.00 | 308.90 | 38.15 | 14.65 | 116.00 |
| Parks Acreage | | 811 | 2,227 | not available | 36 | 196 |
| Number of Parks | | 20 | 37 | 9 | not available | 24 |
| Trails | | 53 | not available | not available | not available | not available |

*Compared to neighboring cities, Ashland trails in cost recovery*

Budget

## Main General Fund Revenues*

- Revenue expectation 1-3% for BN 25-27
  - Property Taxes = $13.5M
    - *Capped at 3%*
  - Franchise Fees = $4.0M
    - *Impacted due to no rate increases for utilities*
  - Electric User Tax = $3.6M
    - *On average has only increased less than 1% in the last 5 years*

* Actuals for Fiscal Year 2024



Budget

## Main General Fund Revenues

- Revenue expectation 1-3% for BN 25-27
  - Transient Lodging Tax = $1.9M
    - *Since 2023, 31% goes to Tourism Fund and remaining in GF*
    - *Since 2019, total tax down 12%*
  - Grant Revenues
    - *Received Covid and state grants last two bienniums to fund operations and unhoused initiatives*
    - *Forecasting large decrease in grant revenues in BN 25-27*

Budget

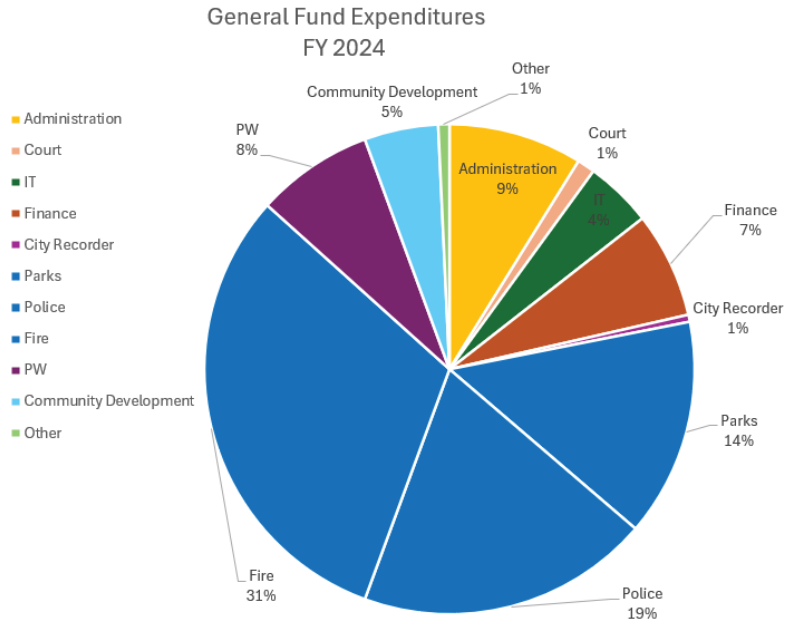
## Main General Fund Pressures

- Personnel costs & Service level expectations
  - Personnel most valuable asset and necessary to provide service
    - ~15% increase in personnel costs
  - Service levels
    - Increase in demand for service
      - Ambulance calls
      - Maintenance needs
      - Transient population



Budget

## General Fund Expenditures




*GF personnel costs are 62% of total expenditures*

*Key expenditures expected to grow by 25% in BN 25-27*

Budget

## Cost Recovery

- **Police & Fire**
  - *Personnel costs for both depts have increased*
  - *Public Safety & AFR Fees have not increased since 2018 & 2019*
  - *While Ambulance revenue covers Single Role EMS and addresses dropped calls, program is an increase of 8 FTE or $1.5M per year. Less revenue is covering fire personnel.*
- **Parks**
  - *Operational costs have increased; prohibition of herbicides increases staffing*
  - *Food & Beverage tax cannot go towards Parks operations, only capital improvement.*



Budget

## Dedicated Fees for Priority Programs: Public Safety $5 ($60/yr)

- Public Safety $530K annual increase funds:
  - *Transition the Single Role program from a pilot to permanent for four single role positions.*
  - *Continue to vet program & cost benefit ratio given uncertainty on cost recovery*
    - *Goal: Maintain call volume response rate with the single role program*
- No fee increase:
  - *Removal of single role program*

*Alternatives:*

| $3 Fee (36/yr) | $4 Fee ($48/yr) | $6 Fee ($78/yr) |
|---|---|---|
| • Unable to maintain single role program<br>• Maintain staffing levels of police & fire minus single role program | • Transition to 4 single role positions from 8 | • Full pilot transition to permanent<br>• Need additional time/ information of full 8 team members & cost recovery |

Budget

## Dedicated Fees for Priority Programs: Wildfire (AFR) $6 ($72/yr)

- Wildfire Fee (AR)$416K annual increase funds:
  - *Dedicated funding for mitigation work (one-time funding used prior for large scale mitigation work)*
  - *Dedicated funding for wildfire personnel & emergency management*
- No fee increase:
  - *Transition from mitigation work to education only work*
  - *Reduction in staffing year 2 of BN*

### *Alternatives:*

| $4 Fee ($48/yr) | $5 Fee ($60/yr) | $7 Fee ($84/yr) |
|---|---|---|
| • Reduction in staffing from 2 FTE to 1 FTE end of BN | • Retain 2 FTE<br>• Education only, minimal mitigation | • Retain 2 FTE & option to increase<br>• Mitigation work & grow fund for additional mitigation work watershed & City |



Budget

## Dedicated Fees for Priority Programs: Parks $5 ($60/yr)

- Parks Fee starts Jan 1st, funds:
  - *Maintain current level of parks maintenance and operations*
  - *Funds staffing for East Main Park*
  - *Full staffing of senior center*
- No fee increase:
  - *Reduction in parks maintenance*
  - *Reduction in senior center services*
  - *East Main Park delayed or does not move forward*
    - *Return grant funds*

### *Alternatives:*

| $3 Fee ($36/yr) | $4 Fee (48/yr) | $6 Fee ($72/yr) |
|---|---|---|
| • Maintain current parks maintenance levels | • Maintain senior center services current levels<br>• Maintain current parks maintenance levels | • Maintain senior center services current levels<br>• Maintain current parks maintenance levels<br>• Increase in mitigation and maintenance work |

Budget

# Dedicated Fees for Priority Programs

| FEE REVENUE | Current | Proposed | FY 25 | Proposed FY 26 | Proposed FY 27 |
|---|---|---|---|---|---|
| Public Safety Fee | $ 1.50 | $ 5.00 | $ 220,000 | $ 750,000 | $ 750,000 |
| AFR Fee | $ 3.00 | $ 6.00 | 390,000 | 806,000 | 806,000 |
| Parks Fee* | $ - | $ 5.00 | - | 375,000 | 750,000 |
| **Total Revenue** | | | $ 610,000 | $ 1,931,000 | $ 2,306,000 |
| ***Additional revenue*** | | | | | |
| Public Safety | | $ 3.50 | | $ 530,000 | $ 530,000 |
| AFR Fee | | $ 3.00 | | 416,000 | 416,000 |
| Parks Fee* | | $ 5.00 | | 375,000 | 750,000 |
| **Additional Revenue** | | $ 11.50 | | $ 1,321,000 | $ 1,696,000 |
| | | | | **Total** | **3,017,000** |

** Proposing Parks Fee start January 1, 2026*



Budget

# Next Steps:

Budget Process
- Operational efficiencies and staffing are still being reviewed as budget process moves forward & will continue throughout next BN

Additional Needs
- Facilities
  - Divestment of property to fund facilities needs
    - City & Parks

# QUESTIONS?

**ASHLAND CITY COUNCIL**
**BUSINESS MEETING MINUTES**
**Tuesday, April 1, 2025**

**6:00 PM Business Meeting**
Council Present: Mayor Graham, Councilors Knauer, Dahle, DuQuenne, Kaplan, and Hansen.
Council Absent: Bloom
Staff Present:

| | |
|---|---|
| Sabrina Cotta | City Manager |
| Doug McGeary | Acting City Attorney |
| Alissa Kolodzinski | City Recorder |
| Brandon Goldman | Community Development Director |
| Aaron Anderson | Senior Planner |
| Tighe O'Meara | Police Chief |
| Mark Shay | Fire Marshall |
| Scott Fleury | Public Works Director |
| Rocky Houston | Park and Recreation Director |
| Jordan Rooklyn | Deputy City Manager |

**I. CALL TO ORDER**
Mayor Graham called the meeting to order at 6:01 p.m.
*a.* Land Acknowledgement**
Councilor DuQuenne read the land acknowledgement.

**II. PLEDGE OF ALLEGIANCE**
Councilor Dahle led the pledge of allegiance.

**III. ROLL CALL**

**IV. MAYOR'S/ CHAIR OF THE COUNCIL ANNOUNCEMENT**
a. A Proclamation in honor of Arbor Day 2025- Graham read the proclamation
b. A Proclamation in honor of Independent Media Week 2025 - Graham read the proclamation

**V. APPROVAL OF MINUTES**
a. Minutes of March 17, 2025, Study Session Meeting
b. Minutes of March 18, 2025, Business Meeting

**Motion made to accept the minutes agenda as is.**
Motion: DuQuenne Second: Knauer
**Roll Call Vote: Councilor Knauer, Dahle, DuQuenne, Kaplan, and Hansen. YES. Motion passed**.

**VI. CONSENT AGENDA**
a. 2025 Slurry Seal Award of Bid-Contract
b. Committee Appointment Term Extensions
c. Resolution 2025-03 Authorizing Property Line Adjustment and Conveyance of City-Owned Property (Imperatrice Property)

**Motion made to approve the consent agenda.**
Motion: Hansen Second: Kaplan
**Roll Call Vote: Councilor Knauer, Dahle, DuQuenne, Kaplan, and Hansen. YES. Motion passed.**

## VII. SPECIAL PRESENTATIONS

### a. Jackson County Library District

Board Member Marta Tarantsey and Library Director Kari May presented information on the Jackson County Library District Board (see attached).

- Has served residents for over 100 years, and for 10 years as a special district funded by property tax levy at 60 cents per $1,000 assessed value.
- Currently in year four of a five-year strategic plan which outlines four goals:
  - Energize library services and resources – collection includes a 'library of things'.
  - Expand access to the library – Ashland is now open 7 days a week and until 7PM, Monday through Thursday with a book locker at the YMCA for after-hours pickup.
  - Engage community to ensure services are responsive to community wants/needs through partnerships that extend services beyond branches including a mobile technology van provides a hotspot and technology classes at Ashland Senior Center.
  - Nurture the library's infrastructure with adequately trained staff.

## VIII. PUBLIC FORUM – Citizen spoke on the importance of Ashland's Parks and in favor of fees.

## IX. PUBLIC HEARING

a) Public Hearing and First Reading of Ordinance 3259: "An Ordinance Annexing Property and Withdrawing an Annexed Area from Jackson County Fire District No. 5 (300 Clay Street – Planning Action #PA-T3—2024-0010)

Goldman and Anderson provided a presentation regarding the context and process of this item as a quasi-judicial land use hearing (see attached).

- Part of a broader site review for approval of a 4.8-acre annexation to accommodate a mixed residential use development with 21 single-family home lots and 16 units within fourplexes.
- The agenda packet includes the full packet presented to the Planning Commission in February as well as Planning Commission and Staff recommendations.
- Staff broadly outlined how the annexation request meets the approval criteria and spoke that the development includes the required percentage of affordable housing.
- Provided a detailed review of how the application met the approval criteria. The Planning Commission approved the application with a condition of approval that the final plan shall identify a mix of bedrooms for the affordable units comparable to the bedroom mix of the market rate units and include necessary deed restrictions to ensure compliance. The applicant is seeking an exception to this requirement and met with staff after this conditional approval. Staff believe the exception criteria is met because of the nature of the development and that the affordable housing portion will be built out first while exceeding phasing standards.
- Recommendation is for City Council to approve the annexation and the exception regarding the bedroom mix as it satisfies the applicable criteria.

- Discussion about the potential for increased vehicle traffic in the area. Specific streets in the Transportation System Plan were identified as being capable of handling increased traffic. While the development was not large enough to trigger a Transportation Impact Analysis, each application is reviewed for trip-generation which was provided by the applicant.

The applicant Amy Gunter with Rogue Planning & Development Services provided a presentation (see attached).

- Highlighted minor changes to the site plan including reduction of some building heights to accommodate solar access, and the widening of the main internal new street.
- Provided detail of the trip generation assessment and trip dispersal routes.
- Clarified how the wetland buffer zone will function after development.
- Final plan submittal will include conceptual elevations of contemporary craftsman style plans with alternatives and the Homeowners Association's CCNR's (Covenants, Conditions, and Restrictions), and Architecture Review Board will oversee standards.

Public hearing open
No comments
Public hearing closed
Discussion: none
Decision:
**Motion made to approve the first reading of Ordinance No. 3259, an ordinance annexing property and withdrawing an annexed area from Jackson County Fire District No. 5, and direct staff to prepare findings for Planning Action #PA-T3-2024-00010 reflecting the approval of the applicant's requested exception to the bedroom mix standard under AMC 18.5.8.050.G.3, while incorporating the remainder of the Planning Commission's March 11, 2025 recommended conditions of approval and schedule a second reading for April 15th, 2025.**
Motion: Dahle Second: Kaplan
**Roll Call Vote: Councilor Dahle, DuQuenne, Knauer, Kaplan, and Hansen. YES. Motion passed.**

*Recess from 7:26 - 7:35PM*

b. First Reading-ORD 3258 An Ordinance Amending AMC Chapter 10.30 to Prohibit Hazardous Fire Use

O'Meara & McGeary provided information on the reason for the ordinance with updated language (see packet for proposed language).

- There is no current criminal liability for someone that starts an unlawful fire that spreads if the fire department extinguishes it before any real property damage.
- The intent is to provide for criminal sanctions under certain circumstances. Currently, this circumstance would result in a violation.
- The proposed ordinance provides for a misdemeanor during fire season if the fire department is called to extinguish an unlawful fire.
- Enforcement language includes clarification that nothing shall be construed to prohibit the lawful use of portable cooking devices

Discussion:

- Case law does support criminal sanctions in situations without real property loss and other municipalities have made similar changes.
- This ordinance focuses on the wildfire season, when the City is most vulnerable.

Public hearing open
No comments
Public hearing closed

Decision:
**Motion made to amend Ordinance No. 3258 as presented for first reading by adopting the red-lined changes including the clarification in AMC 10.30.060.A.3 that exempts authorized cooking fires and campfires, and the added definition AMC 10.30.005 confirming that lawful use of portable cooking devices such as propane stoves and grills is permitted in designated picnic or recreation areas unless otherwise restricted by fire danger or burn bans.**
**Motion:** Kaplan **Second**: Hansen
**Roll Call Vote: Councilor Dahle, DuQuenne, Kaplan, Knauer, and Hansen. YES. Motion passed.**

## X. ORDINANCES, RESOLUTIONS AND CONTRACTS

### a. Second reading of Ordinance 3257, update to AMC 9.04 Weeds and Noxious Vegetation

Fire Marshall Mark Shay presented the updated language (attached) - no changes from first reading.

Discussion: none
Decision:
**Motion made to approve the second reading of ordinance 3257, an amendment to AMC 9.04 weeds and noxious vegetation.**
Motion: DuQuenne Second: Kaplan
**Roll Call Vote: Councilor Dahle, DuQuenne, Knauer, Kaplan, and Hansen. YES. Motion passed.**

## XI. UNFINISHED BUSINESS

## XII. NEW BUSINESS

a. 2025-2027 Capital Improvement Program Adoption & 2028-2031 Look Ahead

Parks Director Rocky Houston provided a presentation (included in the agenda packet).

- 2026-2031 Capital Improvement Plan (CIP) for Parks includes the following project types: preventative maintenance, major maintenance, park enhancements, planning, land acquisitions, and vehicles & equipment.

Discussion:

- Parks is responsible for the fountain restoration which is slated for completion by next summer.
- The Kestrel Pedestrian Bridge Project did not move forward due to lack of funding. The Nevada Street Bridge Project was identified in the 2012 Transportation System Plan (TSP) as a Public Works project, but the Transportation Commission and Council decided to not move forward, and the project will be re-evaluated for consideration in the next TSP.
- Discussion about the process of identifying and funding new trail development.
- Discussion about the difference between the six-year CIP and the two-year biennial budget.

Fleury outlined the CIP process for Public Works projects including service goals, regulatory requirements, priorities, project efficiency, lifecycle replacement, and population growth while taking into consideration risk and resilience (see attached presentation).

- Each project adopted in the 2-year CIP will include a narrative outlining project description, cost & funding, timing & duration and compiled into a Capital Dashboard by the City's Geographic Information System (GIS) team.
- Consideration will be given to timing /phasing of road projects to not contribute to congestion in peak summer months, and consolidation of projects for efficiency in coordination with utilities.
- Discussion about the central bike path project - potential allocation of system development charges to fund a feasibility study to explore that project.
- Discussion about the facilities planning study that is underway - will include recommendations for consolidation and/or divestment of properties.
- Discussion about the Clay Street Road improvement project and related budget.
- Piping the TID ditch has not been included as a project since 2018 when no direction was given from Council to move forward. Recommendation for piping both front and back sides if taking this project back up in the future.
- Funding to execute Council's direction for 2200 Ashland Street improvements have been identified. Council will need to provide direction for any use beyond a severe weather shelter to be included in the Capital Improvement plan.
- Discussion of HVAC improvements to Briscoe School property as part of the facilities plan - lease revenue will address paving restoration needed at that site.

Citizen spoke about distracted driving concerns and the importance of protected bike lanes and improvements to the central bike path for connectivity.

Decision:

**Motion made to accept the two (2) year Capital Improvement Plan with the six-year overview.**

Motion: Hansen Second: Knauer

**Roll Call Vote: Councilor Knauer, Dahle, Kaplan, and Hansen: YES. DuQuenne: No. Motion passed.**

b. 2025-2027 Transient Lodging Tax (TLT) Revenue Use for Tourism Promotion

Rooklyn spoke about bringing this item forward for continued conversation and feedback for incorporation into the budget.

- The goal is to increase overnight visitors for a year-round economy and diversify our visitor persona.
- Strategies include developing a strategic marketing plan with other organizations that have a substantial visitor draw.
    - Target audience includes the drive market (those that live within a two - six hour drive to Ashland)
    - Those that have direct flights to Medford and will be reached through various channels/publications that cater to the tourist persona.
    - Marketing support for businesses to market themselves, recruiting medium-sized events (300-800 person events), and keeping local dollars local whenever possible.

Discussion:

- General agreement with the strategies as presented.
- The event grant program will aim to attract events such as conferences with 300-800 visitors.
- Ongoing conversations with OSF aim to better coordinate marketing efforts to diversify and amplify outcomes. Other businesses bringing in visitors include Oregon Cabaret and Websters.
- Request for direct feedback from businesses along the way to allow for changes as needed.
- Infrastructure investment includes things like wayfinding signage and parking. Request for beautification in south Ashland.
- OSF is working with EPIC Ashland and StoryTown to create more events

**XIII. CITY MANAGER REPORT**

**XIV. OTHER BUSINESS FROM COUNCIL MEMBERS/REPORTS FROM COUNCIL LIAISONS**

**XV. ADJOURNMENT**

The meeting was adjourned at 9:30 p.m.

City Recorder Alissa Kolodzinski

Mayor Tonya Graham

DRAFT

**A Proclamation in honor of Independent Media Week 2025**

**WHEREAS,** an informed citizenry is a cornerstone of democracy, and

**WHEREAS,** an informed citizenry depends on unrestrained press, which provides greater access to information, more points of view and greater diversity of thought and fact, and

**WHEREAS,** the trend toward the consolidation of media ownership has resulted in journalistic practices that hinder public awareness by excluding or marginalizing minority and dissenting viewpoints, and

**WHEREAS,** fewer media voices can result in homogenized messaging and the silencing of many points of view, and

**WHEREAS,** Democratic principles support the case for more independent media in this country, not less.

**NOW, THEREFORE**, I, Tonya Graham, Mayor of the City of Ashland, Oregon, on behalf of the City Council, do hereby proclaim the week of April 13-19 as INDEPENDENT MEDIA WEEK and encourage all citizens to seek out and explore the rich diversity of independent media available within, and to our community.

*Dated this 1st day of April 2025*

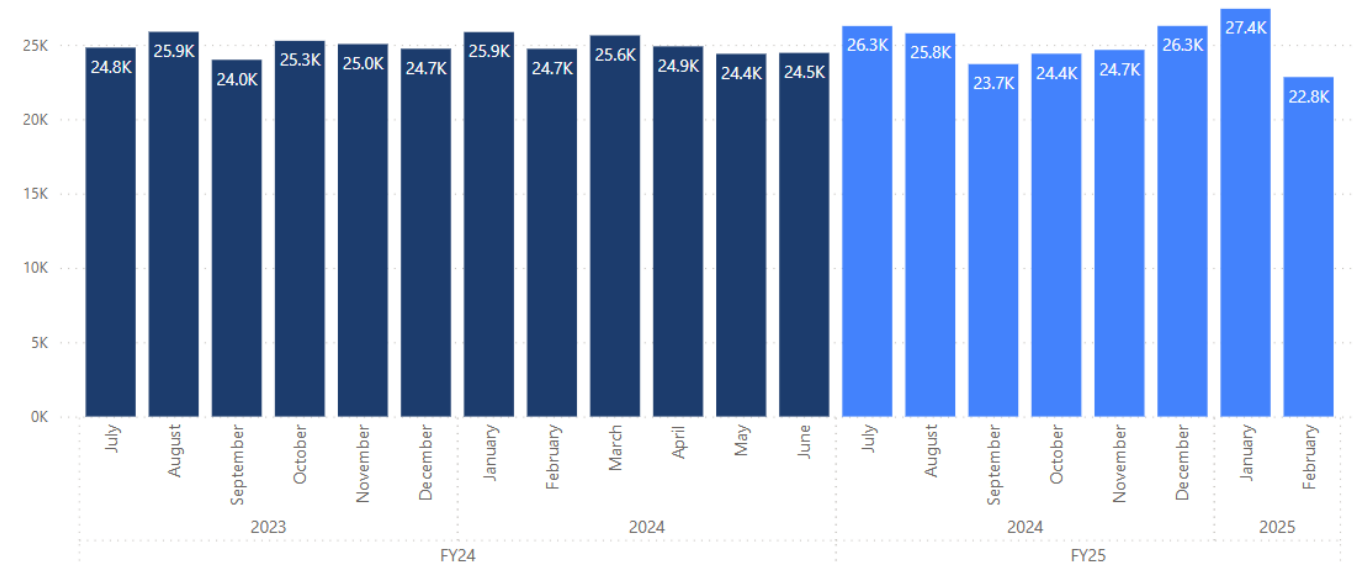
Tonya Graham, Mayor

Alissa Kolodzinski, City Recorder

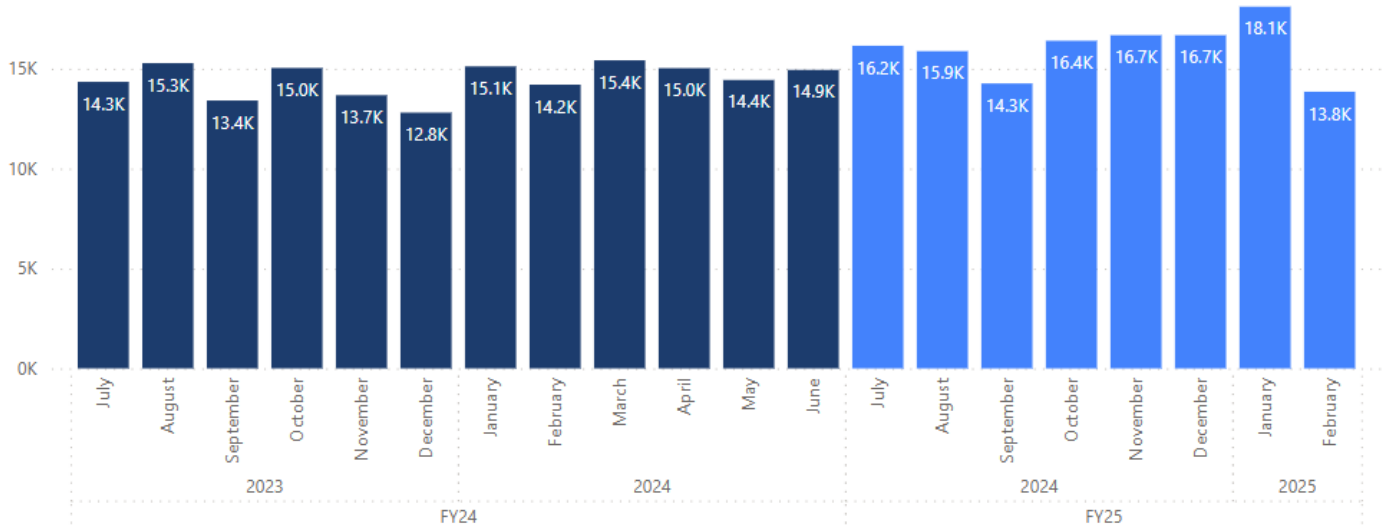
# KPI Snapshot

## Ashland

### Physical Circulation

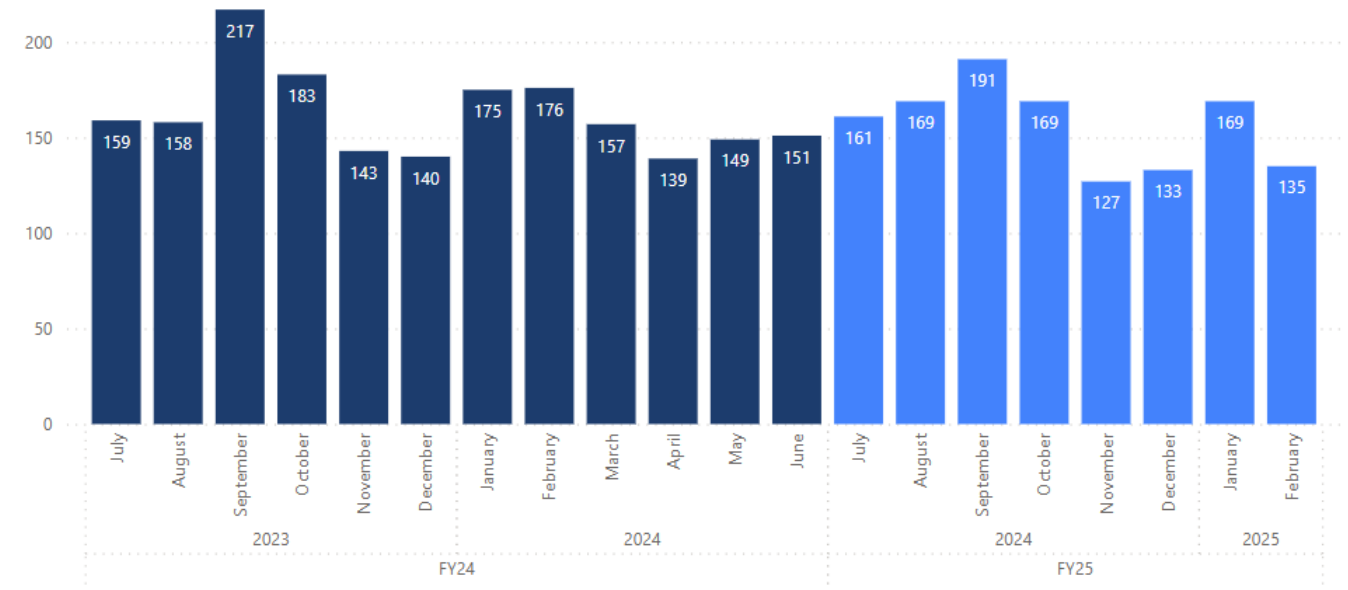



### Library Visits

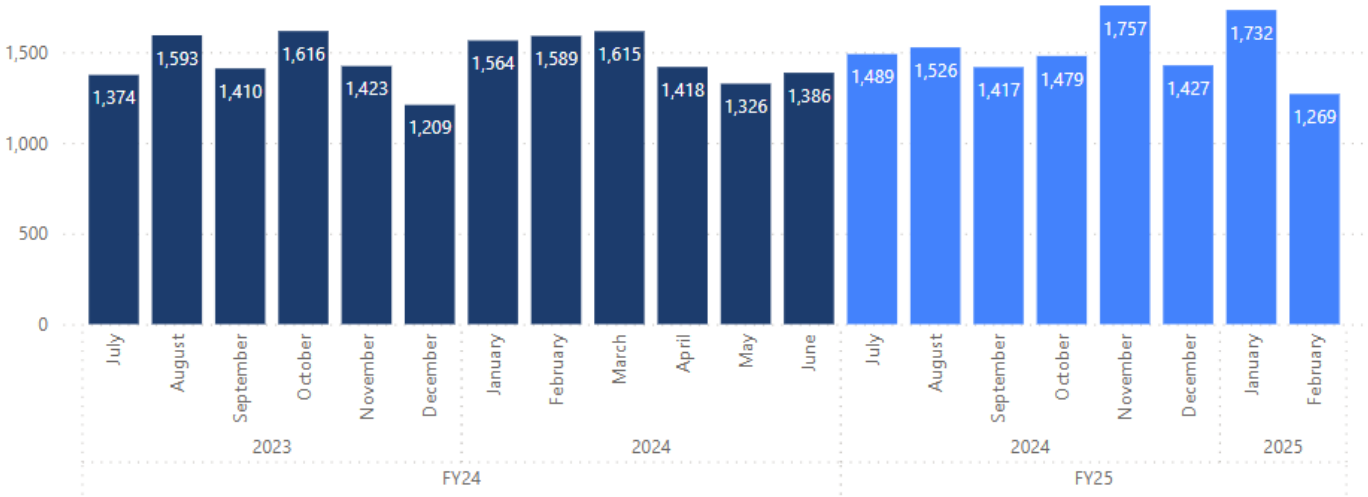


# Ashland

## New Cardholders

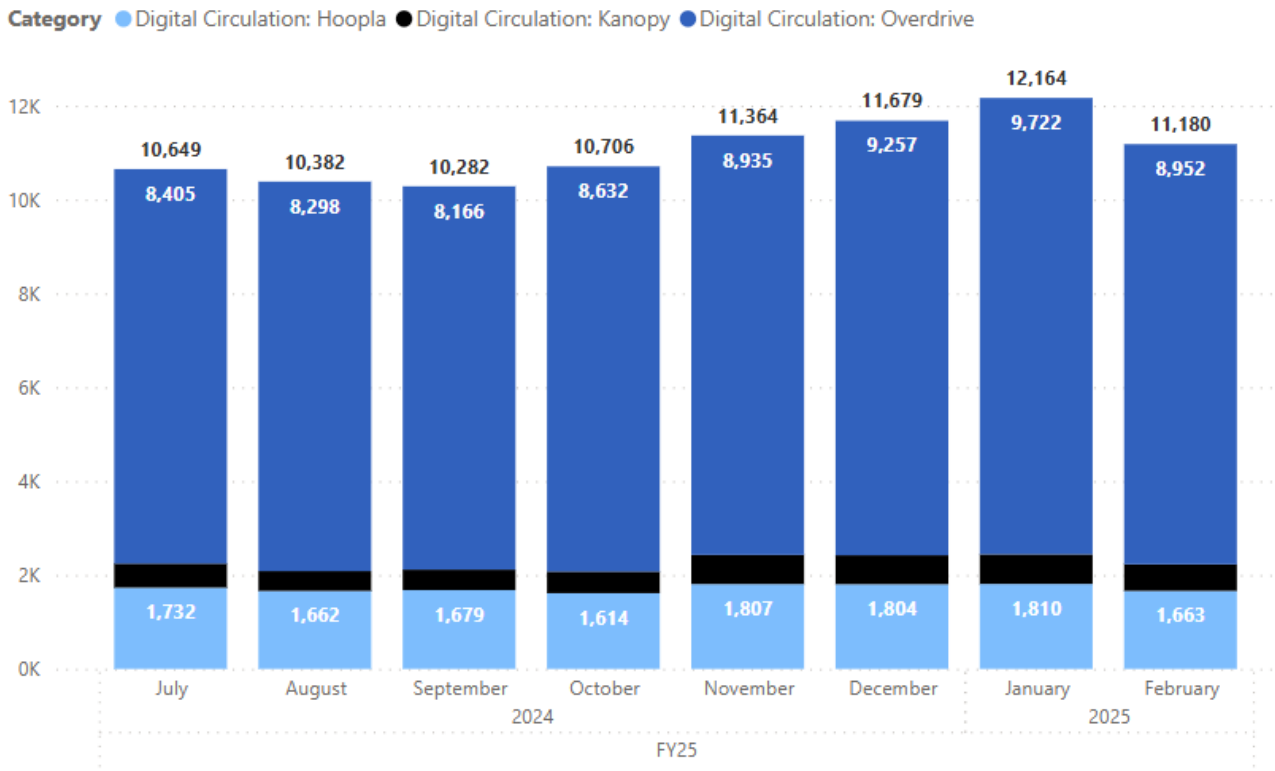



## Computer Use: Number of Sessions



# Ashland

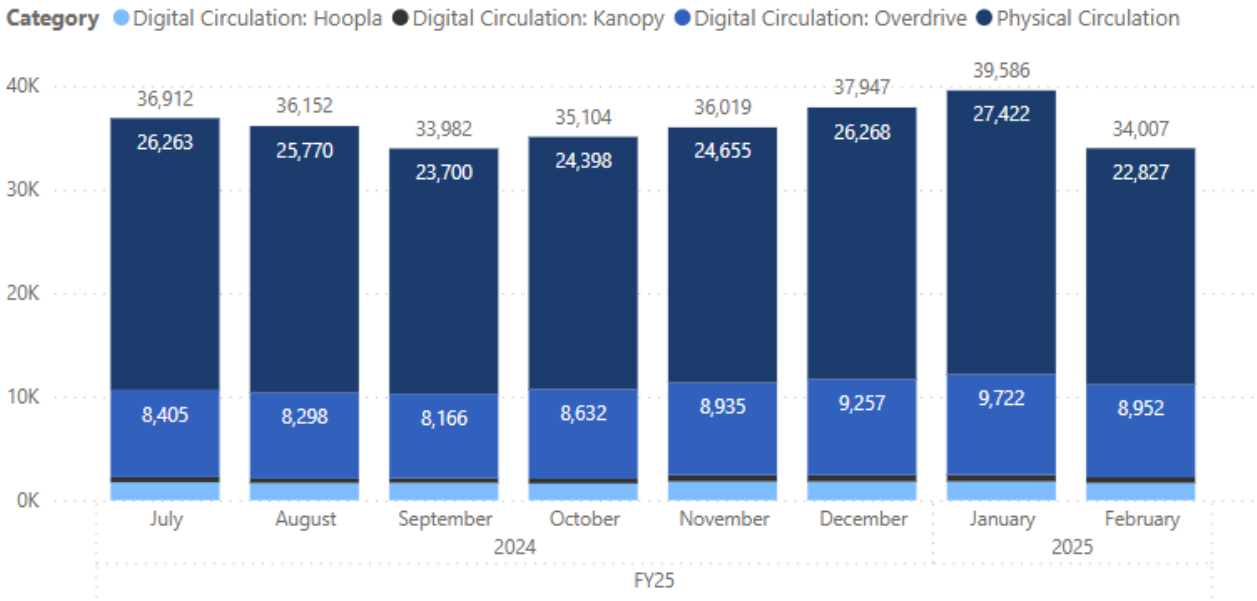
## FY25: Digital Circulation by Cardholder's Branch




| FY | FY25 | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Year | 2024 | | | | | | 2025 | |
| Category | July | August | September | October | November | December | January | February |
| Digital Circulation: Overdrive | 8,405 | 8,298 | 8,166 | 8,632 | 8,935 | 9,257 | 9,722 | 8,952 |
| Digital Circulation: Kanopy | 512 | 422 | 437 | 460 | 622 | 618 | 632 | 565 |
| Digital Circulation: Hoopla | 1,732 | 1,662 | 1,679 | 1,614 | 1,807 | 1,804 | 1,810 | 1,663 |
| **Total** | **10,649** | **10,382** | **10,282** | **10,706** | **11,364** | **11,679** | **12,164** | **11,180** |

# Ashland

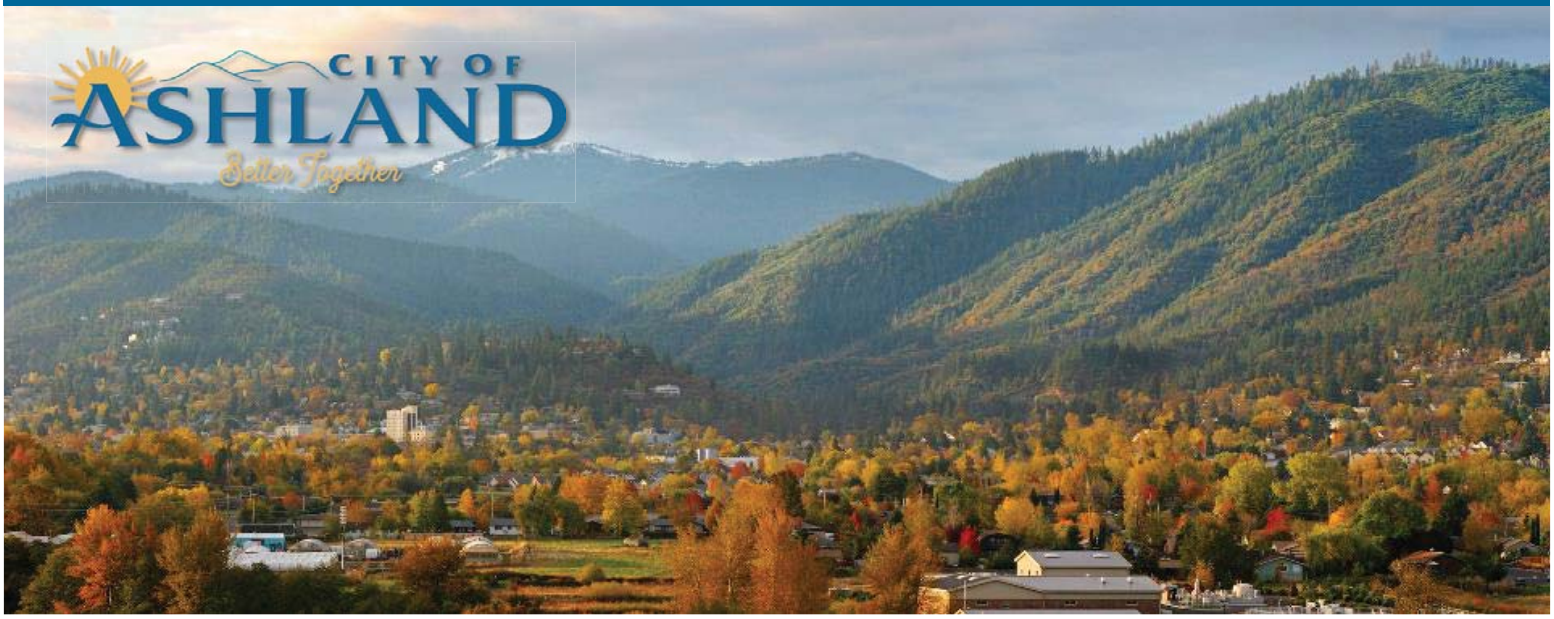
## FY25 Total Circulation - Physical and Digital Together




| FY | FY25 | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Year | 2024 | | | | | | 2025 | |
| Category | July | August | September | October | November | December | January | February |
| Physical Circulation | 26,263 | 25,770 | 23,700 | 24,398 | 24,655 | 26,268 | 27,422 | 22,827 |
| Digital Circulation: Overdrive | 8,405 | 8,298 | 8,166 | 8,632 | 8,935 | 9,257 | 9,722 | 8,952 |
| Digital Circulation: Kanopy | 512 | 422 | 437 | 460 | 622 | 618 | 632 | 565 |
| Digital Circulation: Hoopla | 1,732 | 1,662 | 1,679 | 1,614 | 1,807 | 1,804 | 1,810 | 1,663 |
| **Total** | **36,912** | **36,152** | **33,982** | **35,104** | **36,019** | **37,947** | **39,586** | **34,007** |

# Program Highlights: Ashland Library

| | Attendance |
|---|---|
| **Programs** | |
| 02/08/2025 - 01:00 PM: Build With LEGO Bricks, 5+ YRS | 38 |
| 02/13/2025 - 03:30 PM: Magazine Pickup Day, 13+ YRS | 31 |
| 02/25/2025 - 03:30 PM: Art to-go: Rock Painting, 5+ YRS | 31 |
| 02/22/2025 - 03:00 PM: Oregon Shakespeare Festival On The Radio: Changing Ashland and the Festival, 18+ YRS | 27 |
| 02/23/2025 - 01:00 PM: Board Game Day!, 3+ YRS | 21 |
| 02/09/2025 - 01:00 PM: Build With LEGO Bricks, 5+ YRS | 20 |
| 02/12/2025 - 12:00 PM: Windows in Time: The Blue Ledge: From Scandals to Superfund, 18+ YRS | 18 |
| 02/09/2025 - 01:00 PM: Make Your Own Cactus Rock Garden, 5+ YRS | 15 |
| 02/10/2025 - 02:30 PM: Creative Writing Workshop, 18+ YRS | 9 |
| 02/02/2025 - 01:00 PM: Tween D&D, 9-13 YRS | 8 |
| 02/16/2025 - 01:00 PM: Tween D&D, 9-13 YRS | 8 |
| 02/24/2025 - 02:30 PM: Creative Writing Workshop, 18+ YRS | 6 |
| 02/27/2025 - 03:00 PM: Tissue Paper Stained Glass Candle Holders, 12+ YRS | 6 |
| 02/22/2025 - 01:00 PM: Board Game Day!, 3+ YRS | 6 |
| 02/19/2025 - 03:30 PM: Rogue Reads: Kanopy Kreature Feature and Popcorn Bar, 12+YRS | 5 |
| 02/12/2025 - 02:30 PM: Teen Hangout: Video and Board Games , 13-19 YRS | 3 |
| 02/25/2025 - 04:00 PM: Rogue Reads: Fandom Collaging, 12+YRS | 2 |
| **Storytimes** | |
| 02/19/2025 - 11:00 AM: Babies and Wobblers 0-36MOS | 50 |
| 02/10/2025 - 11:00 AM: Preschool Storytime 3-5 YRS | 49 |
| 02/24/2025 - 11:00 AM: Preschool Storytime 3-5 YRS | 48 |
| 02/26/2025 - 11:00 AM: Babies and Wobblers 0-36MOS | 32 |
| 02/12/2025 - 11:00 AM: Babies and Wobblers 0-36MOS | 23 |
| 02/03/2025 - 11:00 AM: Preschool Storytime 3-5 YRS | 12 |
| 02/26/2025 - 02:00 PM: Babies and Wobblers 0-36MOS | 9 |
| 02/12/2025 - 02:00 PM: Babies and Wobblers 0-36MOS | 7 |
| 02/19/2025 - 02:00 PM: Babies and Wobblers 0-36MOS | 3 |




# 300 Clay Street Annexation

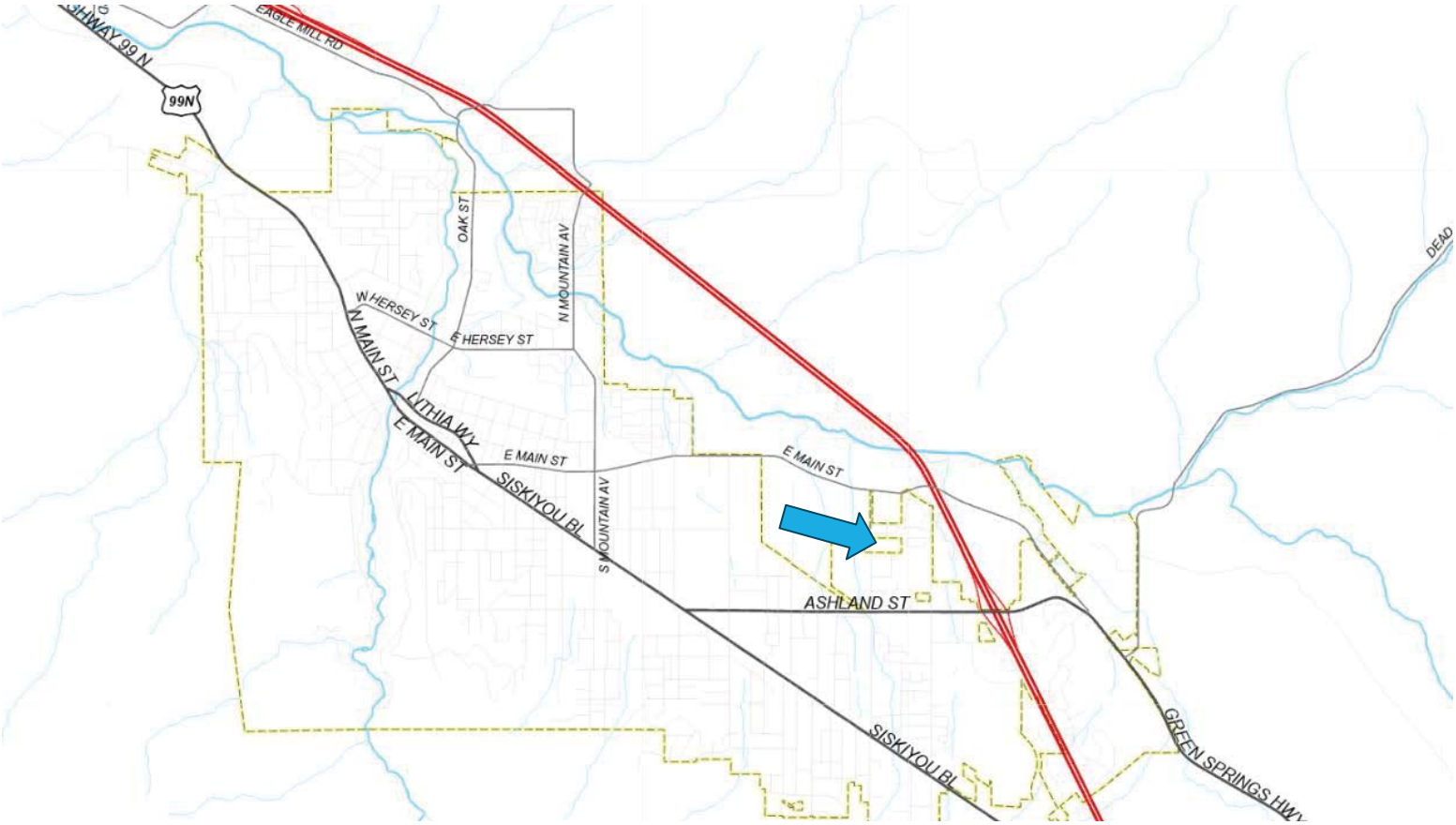
**CITY COUNCIL**

APRIL 1, 2025

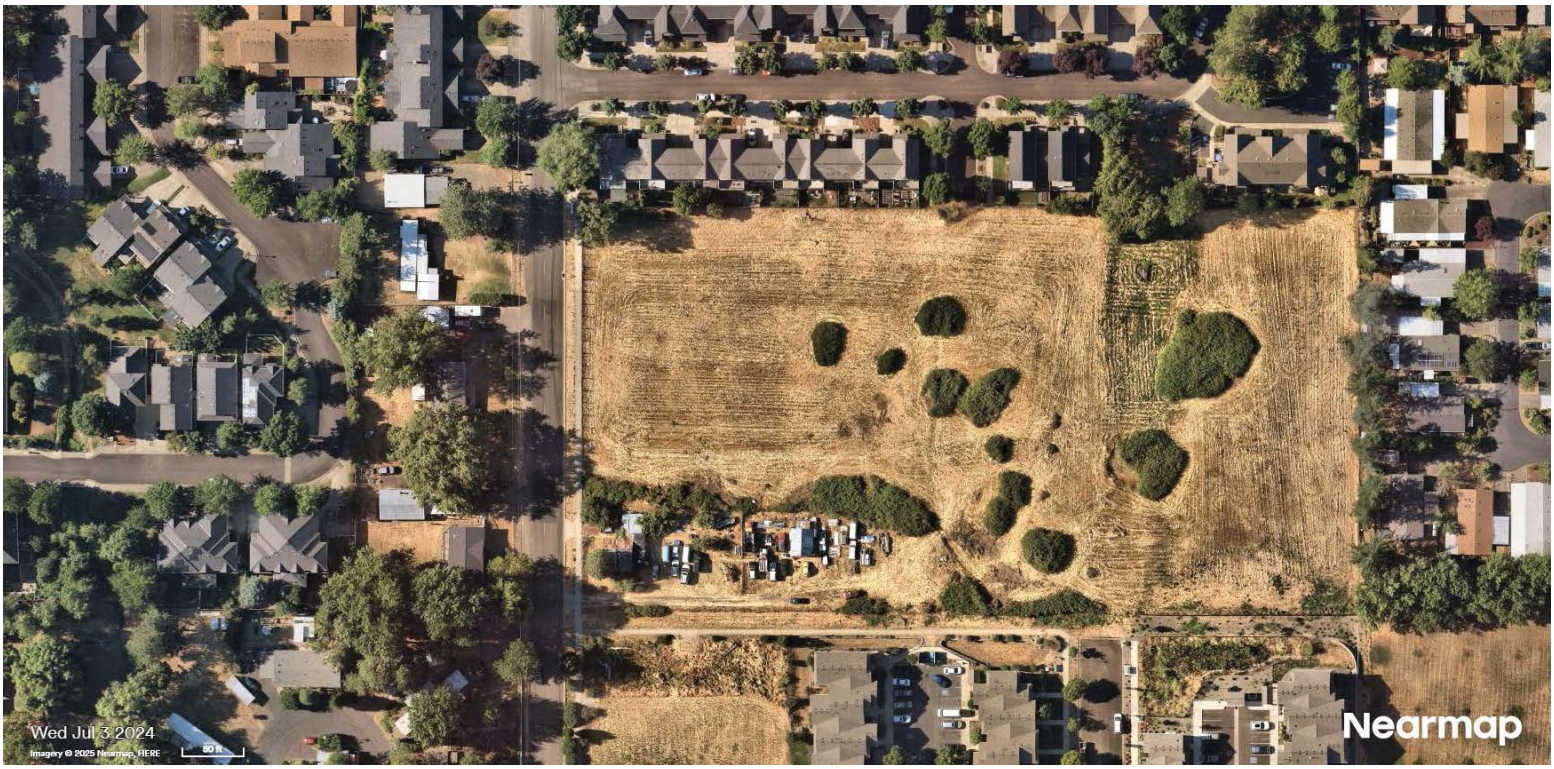
# Brandon Goldman

DEPARTMENT DIRECTOR, COMMUNITY DEVELOPMENT





CREEK DR
MEADOW DR
CLAY ST
ABBOTT AV
DOLLARHIDE WY
ENGLE ST
AUDRY CR
TOLMAN


Wed Jul 3 2024
Imagery © 2025 Nearmap, HERE
Nearmap

# Annexation – Type 3 action

Type III actions are reviewed by the Planning Commission, which makes a recommendation to City Council. The Council makes final decisions on legislative proposals through enactment of an ordinance.

Legislative requests are not subject to the 120-day review period under subsection 18.5.1.090.B (ORS 227.178).

## Approval Criteria - Annexation

A. That the annexed area is within the City's Urban Growth Boundary.

B. That the annexation proposal is consistent with the Comprehensive Plan designations.

C. That the annexed area is contiguous with the city limits.

D. That adequate City facilities are available as determined by Public Works.

E. That adequate transportation can and will be provided to serve the annexed area.



## Aaron Anderson

SENIOR PLANNER, COMMUNITY DEVELOPMENT

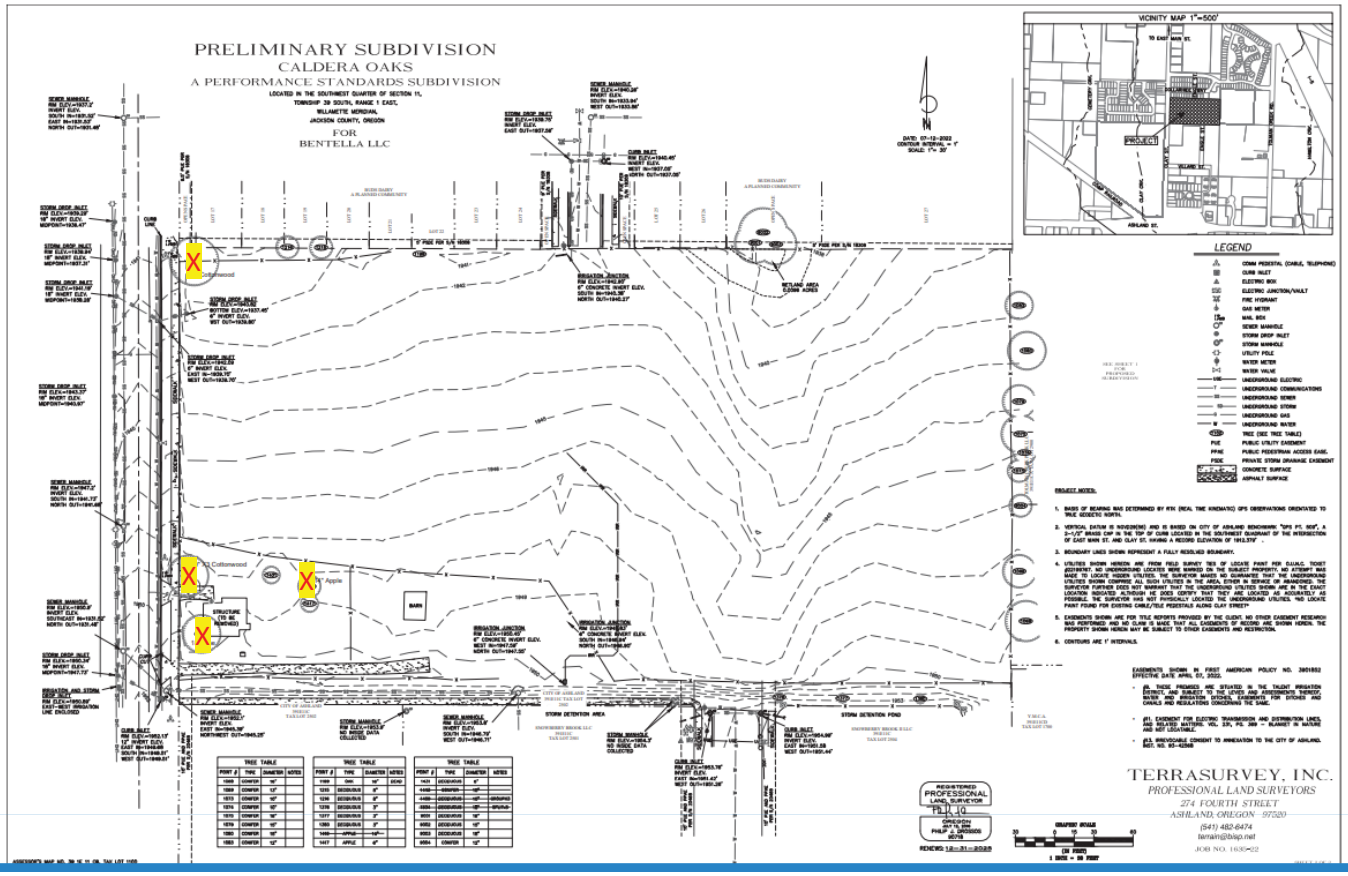
# 300 Clay Street

**Annexation/Zone Change** for a 4.8-acre property, along with adjacent right-of-way (ROW). Annexations require that at least 25 percent of the base density be provided as affordable housing. Here, eight affordable housing units are proposed at 80 percent of area median income (AMI) to meet this requirement.

29-lot (37 dwelling unit) **Outline Plan approval** for a Performance Standards Option (PSO) subdivision.

**Limited Activities & Uses Permit** for public utilities within the Water Resource Protection Zone (WRPZ).

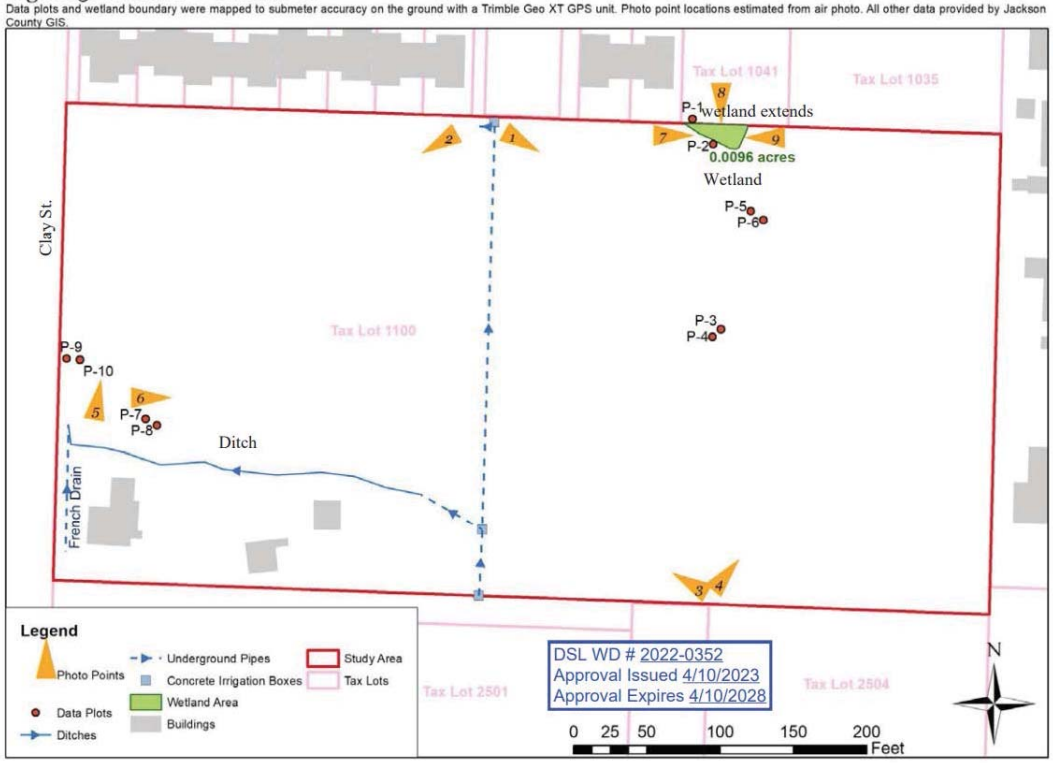
**Tree Removal Permit** to remove four non-hazard trees within proposed rights-of-way or building envelopes. *(Tree MAC had no issues.)*

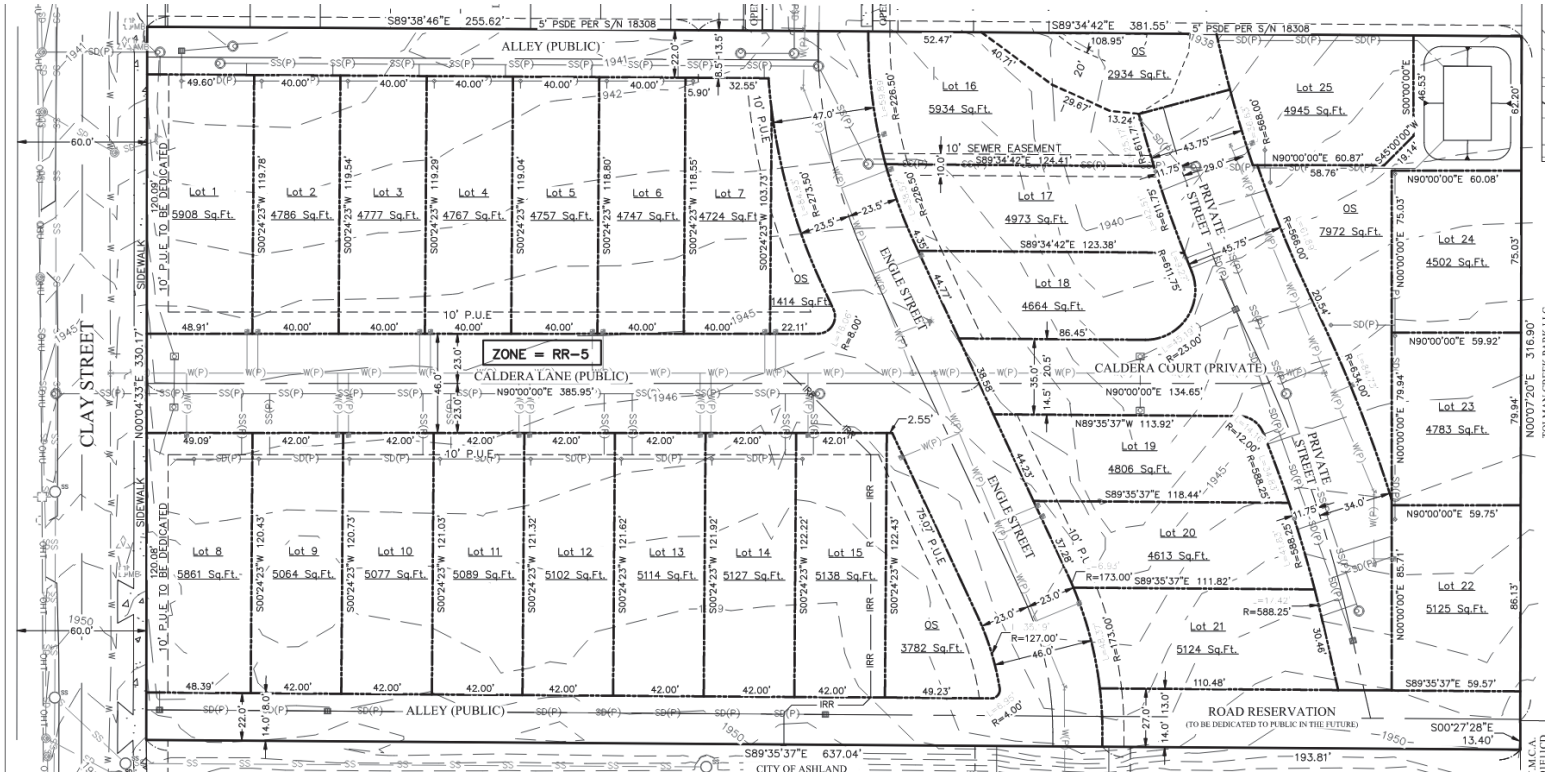



## Figure 5: Wetland Delineation

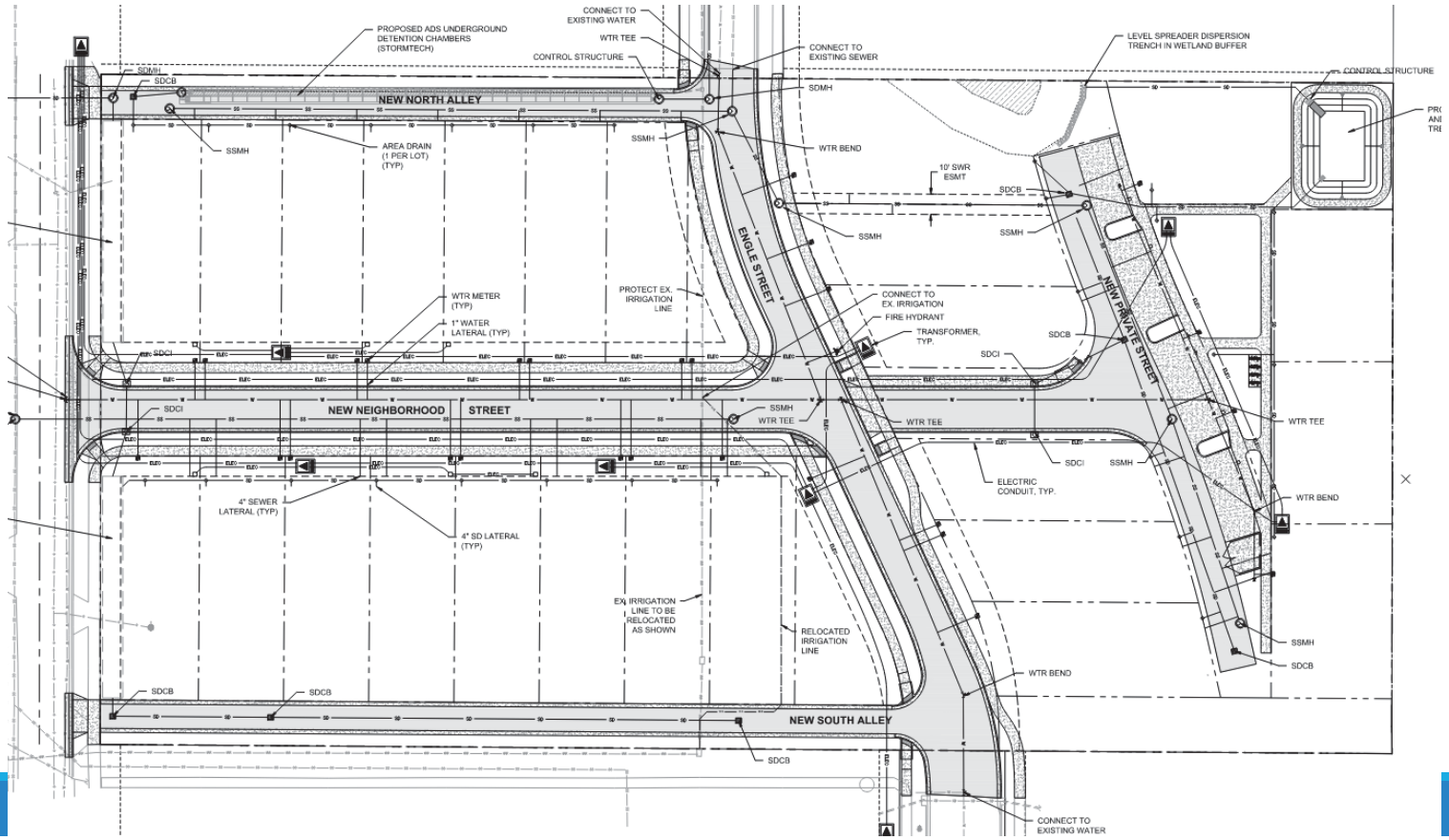
June 12, 2022

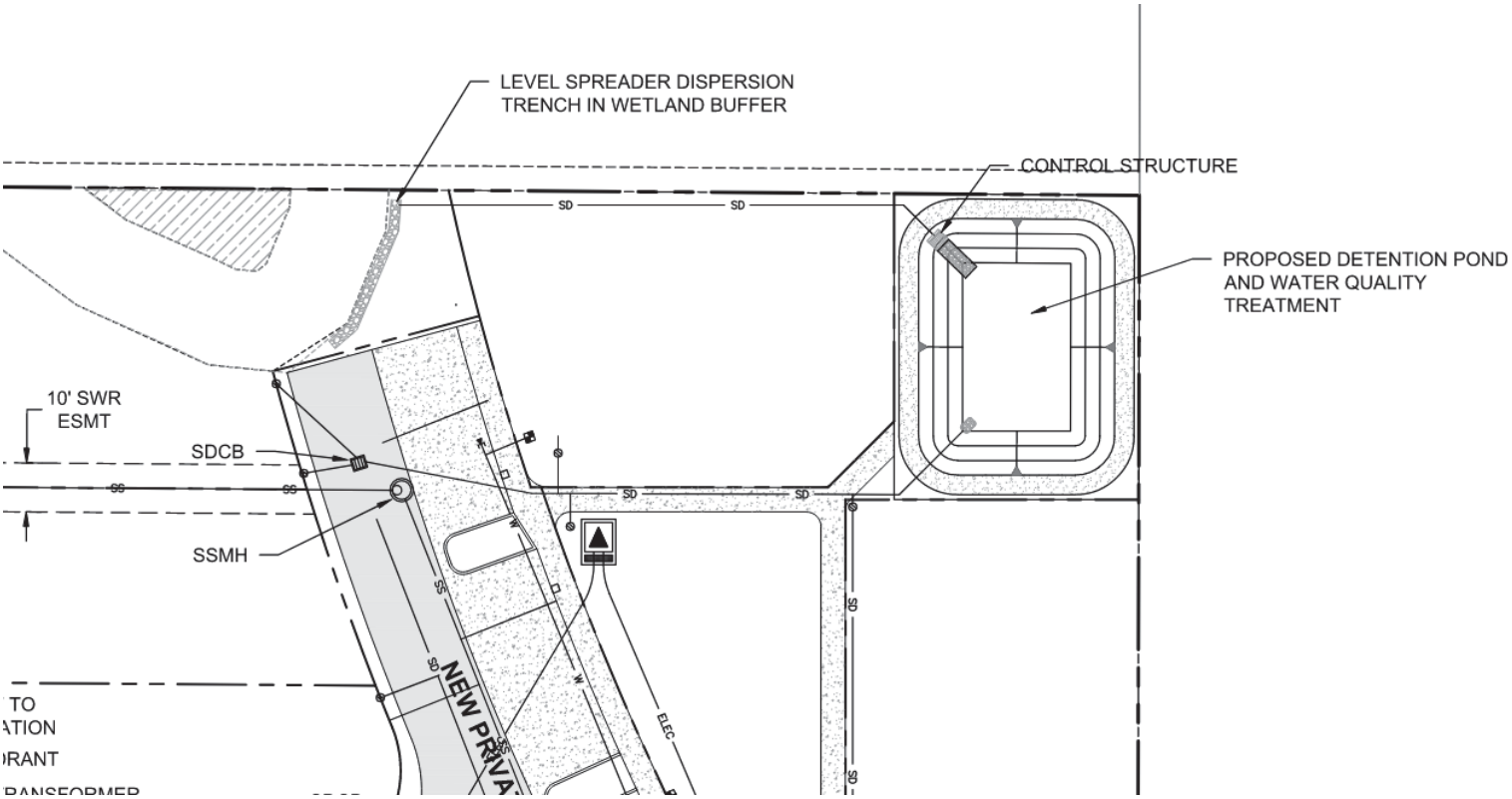
Data plots and wetland boundary were mapped to submeter accuracy on the ground with a Trimble Geo XT GPS unit. Photo point locations estimated from air photo. All other data provided by Jackson County GIS.




ALLEY (PUBLIC)
CLAY STREET
ZONE = RR-5
CALDERA LANE (PUBLIC)
CALDERA COURT (PRIVATE)
ENGLE STREET
PRIVATE STREET
ROAD RESERVATION
(TO BE DEDICATED TO PUBLIC IN THE FUTURE)
CITY OF ASHLAND
10' SEWER EASEMENT
10' P.U.E.
SIDEWALK
Lot 1 5908 Sq.Ft.
Lot 2 4786 Sq.Ft.
Lot 3 4777 Sq.Ft.
Lot 4 4767 Sq.Ft.
Lot 5 4757 Sq.Ft.
Lot 6 4747 Sq.Ft.
Lot 7 4724 Sq.Ft.
Lot 8 5861 Sq.Ft.
Lot 9 5064 Sq.Ft.
Lot 10 5077 Sq.Ft.
Lot 11 5089 Sq.Ft.
Lot 12 5102 Sq.Ft.
Lot 13 5114 Sq.Ft.
Lot 14 5127 Sq.Ft.
Lot 15 5138 Sq.Ft.
Lot 16 5934 Sq.Ft.
Lot 17 4973 Sq.Ft.
Lot 18 4664 Sq.Ft.
Lot 19 4806 Sq.Ft.
Lot 20 4613 Sq.Ft.
Lot 21 5124 Sq.Ft.
Lot 22 5125 Sq.Ft.
Lot 23 4783 Sq.Ft.
Lot 24 4502 Sq.Ft.
Lot 25 4945 Sq.Ft.
OS 2934 Sq.Ft.
OS 7972 Sq.Ft.
OS 1414 Sq.Ft.
OS 3782 Sq.Ft.

15


PROPOSED ADS UNDERGROUND DETENTION CHAMBERS (STORMTECH)
CONNECT TO EXISTING WATER
WTR TEE
CONTROL STRUCTURE
CONNECT TO EXISTING SEWER
LEVEL SPREADER DISPERSION TRENCH IN WETLAND BUFFER
NEW NORTH ALLEY
AREA DRAIN (1 PER LOT) (TYP)
WTR BEND
10' SWR ESMT
ENGLE STREET
NEW PRIVATE STREET
WTR METER (TYP)
1" WATER LATERAL (TYP)
PROTECT EX. IRRIGATION LINE
CONNECT TO EX. IRRIGATION
FIRE HYDRANT
TRANSFORMER, TYP.
NEW NEIGHBORHOOD STREET
ELECTRIC CONDUIT, TYP.
4" SEWER LATERAL (TYP)
4" SD LATERAL (TYP)
EX. IRRIGATION LINE TO BE RELOCATED AS SHOWN
RELOCATED IRRIGATION LINE
NEW SOUTH ALLEY
CONNECT TO EXISTING WATER






**Application includes examples of various proposed unit types**

**Schematic Design of Townhomes**

*Propose Site Design Review concurrently with Final Plan*

# 300 Clay Street

The Planning Commission conditionally approved the application including the following condition of approval:

"That the final plan submittal shall identify a mix of bedrooms for the affordable units comparable to the bedroom mix of the market rate units and include necessary deed restrictions to ensure compliance."

# 300 Clay Street – Request to exception*

**Exception to AMC 18.5.8.050.G.3** which requires the affordable units to have a comparable mix of bedrooms to the market rate units.

- Market rate units are a mix of attached and detached 2-, 3- & 4-bedroom units.
- Affordable are proposed as only 2-bedroom townhomes.
- The applicant proposed to complete the 8 affordable units prior to C of O for any market rate homes
- Applicant asserts they are building townhomes as rentals and cannot control future development of SFR Lots.

# Approval Criteria

## Exception to affordability standards

Annexation

6. Exceptions to the requirements of subsections 18.5.8.050.G.2 through 18.5.8.050.G.5, above, may be approved by the City Council upon consideration of one or more of the following:

a. That an alternative land dedication as proposed would accomplish additional benefits for the City, consistent with the purposes of this chapter, than would development meeting the on-site dedication requirement of subsection 18.5.8.050.G.2.

b. That the alternative phasing proposal not meeting subsection 18.5.8.050.G.4 provided by the applicant provides adequate assurance that the affordable housing units will be provided in a timely fashion.

c. That the materials and amenities applied to the affordable units within the development, that are not equivalent to the market rate units per subsection 18.5.8.050.G.5, are necessary due to local, state, or federal affordable housing standards or financing limitations.



# Phasing Standard

Annexation

4. A development schedule shall be provided that demonstrates that the affordable housing units per subsection 18.5.8.050.G shall be developed, and made available for occupancy, as follows:

a. That 50 percent of the affordable units shall have been issued building permits prior to issuance of a certificate of occupancy for the last of the first 50 percent of the market rate units.

b. Prior to issuance of a building permit for the final ten percent of the market rate units, the final 50 percent of the affordable units shall have been issued certificates of occupancy.

# 300 Clay Street - Staff Recommendation

Staff recommend that the City Council approve the Annexation, which will allow the conditionally approved Outline Plan Subdivision, Limited Uses & Activities Permit and Tree Removal Permit (x4)

Staff also recommends that the City Council approve the exception regarding bedroom mix as these eight units will be constructed first and be completed prior to any market rate dwellings and satisfies the required approval criteria in terms of ‘alternative phasing’.



# 300 Clay Street – Planning Commission Recommendation

The Planning Commission conditionally approved the application including the all of the proposed conditions of approval and rather than approved the exception included the following condition of approval:

"That the final plan submittal shall identify a mix of bedrooms for the affordable units comparable to the bedroom mix of the market rate units and include necessary deed restrictions to ensure compliance."

# Questions?

# Approval Criteria

ANNEXATION, OUTLINE PLAN, LIMITED ACTIVITIES & USES PERMIT



## Approval Criteria

### Annexation

A. The annexed area is within the City's Urban Growth Boundary.

B. The annexation proposal is consistent with the Comprehensive Plan designations applicable to the annexed area, including any applicable adopted neighborhood, master, or area plan, and is an allowed use within the proposed zoning.

C. The annexed area is contiguous with the City limits.

D. Adequate City facilities for the provision of water to the annexed area as determined by the Public Works Department; the transport of sewage from the annexed area to an approved waste water treatment facility as determined by the Public Works Department; the provision of electricity to the annexed area as determined by the Electric Department; urban storm drainage as determined by the Public Works Department can and will be provided from the annexed area. Unless the City has declared a moratorium based upon a shortage of water, sewer, or electricity, it is recognized that adequate capacity exists system-wide for these facilities. All required public facility improvements shall be constructed and installed in accordance with subsection 18.4.6.030.A.

E. Adequate transportation can and will be provided to serve the annexed area. For the purposes of this section, "adequate transportation" for annexations consists of vehicular, bicycle, pedestrian, and transit transportation meeting the following standards:

# Approval Criteria

## Annexation

1. For **vehicular transportation** a minimum 22-foot-wide paved access exists, or can and will be constructed, providing access to the annexed area from the nearest fully improved collector or arterial street. All streets bordering on the annexed area shall be improved, at a minimum, to an applicable City half-street standard. The approval authority may, after assessing the impact of the development, require the full improvement of streets bordering on the annexed area. All streets located within annexed areas shall be fully improved to City standards unless exception criteria apply. Where future street dedications are indicated on the Street Dedication Map or required by the City, provisions shall be made for the dedication and improvement of these streets and included with the application for annexation.

2. For **bicycle transportation**, safe and accessible bicycle facilities according to the safety analysis and standards of the governing jurisdiction of the facility or street (e.g., City of Ashland, Jackson County, Oregon Department of Transportation) exist, or can and will be constructed. Should the annexed area border an arterial street, bike lanes shall be constructed along the arterial street frontage of the annexed area. Likely bicycle destinations within a quarter of a mile from the annexed area shall be determined and the approval authority may require the construction of bicycle lanes or multiuse paths connecting the annexed area to the likely bicycle destinations after assessing the impact of the development proposed concurrently with the annexation.



# Approval Criteria

## Annexation

3. For **pedestrian transportation**, safe and accessible pedestrian facilities according to the safety analysis and standards of the governing jurisdiction of the facility or street (e.g., City of Ashland, Jackson County, Oregon Department of Transportation) exist, or can and will be constructed. Full sidewalk improvements shall be provided on one side of all streets bordering on the proposed annexed area. Sidewalks shall be provided as required by ordinance on all streets within the annexed area. Where the annexed area is within a quarter of a mile of an existing sidewalk system or a location with demonstrated significant pedestrian activity, the approval authority may require sidewalks, walkways or multiuse paths to be constructed and connect to either or both the existing system and locations with significant pedestrian activity.

4. For **transit transportation**, should transit service be available to the annexed area, or be likely to be extended to the annexed area in the future based on information from the local public transit provider, the approval authority may require construction of transit facilities, such as bus shelters and bus turnout lanes.

5. **Timing of Transportation Improvements**. All required transportation improvements shall be constructed and installed in accordance with subsection 18.4.6.030.A.

# Approval Criteria

## Annexation

F. For all residential annexations, a plan shall be provided demonstrating that the development of the annexed area will ultimately occur at a minimum density of 90 percent of the base density for the zone, unless reductions in the total number of units are necessary to accommodate significant natural features, topography, access limitations, or similar physical constraints. The owner or owners of the annexed area shall sign an agreement, to be recorded with the County Clerk after approval of the annexation, ensuring that future development will occur in accord with the minimum density indicated in the development plan. For purposes of computing maximum density, portions of the annexed area containing unbuildable lots, parcels, or portions of the annexed area such as existing streets and associated rights-of-way, railroad facilities and property, wetlands, floodplain corridor lands, slopes greater than 35 percent, or land area dedicated as a public park, shall not be included.

G. Except as provided in subsection 18.5.8.050.G.7, below, annexations with a density or potential density of four residential units or greater and involving residential zoned lands, or commercial, employment or industrial lands with a Residential Overlay (R-Overlay) shall meet the following requirements:



# Approval Criteria

## Annexation

1. The total number of affordable units provided to qualifying buyers, or to qualifying renters, shall be equal to or exceed 25 percent of the base density as calculated using the unit equivalency values set forth herein. The base density of the annexed area for the purpose of calculating the total number of affordable units in this section shall exclude any unbuildable lots, parcels, or portions of the annexed area such as existing streets and associated rights-of-way, railroad facilities and property, wetlands, floodplain corridor lands, water resource areas, slopes greater than 35 percent, or land area dedicated as a public park.

a. Ownership units restricted to households earning at or below 120 percent of the area median income shall have an equivalency value of 0.75 unit.

b. Ownership units restricted to households earning at or below 100 percent of the area median income shall have an equivalency value of 1.0 unit.

c. Ownership or rental units restricted to households earning at or below 80 percent of the area median income shall have an equivalency value of 1.25 unit.

# Approval Criteria

## Annexation

2. As an alternative to providing affordable units per section 18.5.8.050.G.1, above, the applicant may provide title to a sufficient amount of buildable land for development complying with subsection 18.5.8.050.G.1.b, above, through transfer to a non-profit (IRC 501(3)(c)) affordable housing developer or public corporation created under ORS 456.055 to 456.235.

a. The land to be transferred shall be located within the project meeting the standards set forth in sections 18.5.8.050.G.5 and 18.5.8.050.G.6.

b. All needed public facilities shall be extended to the area or areas proposed for transfer.

c. Prior to commencement of the project, title to the land shall be transferred to the City, an affordable housing developer which must either be a unit of government, a non-profit 501(c)(3) organization, or a public corporation created under ORS 456.055 to 456.235.

d. The land to be transferred shall be deed restricted to comply with Ashland's affordable housing program requirements.

e. Transfer of title of buildable land in accordance with this subsection shall exempt the project from the development schedule requirements set forth in subsection 18.5.8.050.G.4.



# Approval Criteria

## Annexation

3. The affordable units shall be comparable in bedroom mix with the market rate units in the development.

a. The number of bedrooms per dwelling unit in the affordable units within the residential development shall be in equal proportion to the number of bedrooms per dwelling unit in the market rate units within the residential development. This provision is not intended to require the same floor area in affordable units as compared to market rate units. The minimum square footage of each affordable unit shall comply with the minimum required floor area based as set forth in Table 18.5.8.050.G.3, or as established by the U.S. Department of Housing and Urban Development (HUD) for dwelling units developed under the HOME program.

4. A development schedule shall be provided that demonstrates that the affordable housing units per subsection 18.5.8.050.G shall be developed, and made available for occupancy, as follows:

a. That 50 percent of the affordable units shall have been issued building permits prior to issuance of a certificate of occupancy for the last of the first 50 percent of the market rate units.

b. Prior to issuance of a building permit for the final ten percent of the market rate units, the final 50 percent of the affordable units shall have been issued certificates of occupancy.

# Approval Criteria

## Annexation

5. That affordable housing units shall be constructed using comparable building materials and include equivalent amenities as the market rate units.

a. The exterior appearance of the affordable units in any residential development shall be visually compatible with the market rate units in the development. External building materials and finishes shall be substantially the same in type and quality for affordable units as for market rate units.

b. Affordable units may differ from market rate units with regard to floor area, interior finishes and materials, and housing type; provided, that the affordable housing units are provided with comparable features to the market rate units, and shall have generally comparable improvements related to energy efficiency, including plumbing, insulation, windows, appliances, and heating and cooling systems.

6. Exceptions to the requirements of subsections 18.5.8.050.G.2 through 18.5.8.050.G.5, above, may be approved by the City Council upon consideration of one or more of the following:

a. That an alternative land dedication as proposed would accomplish additional benefits for the City, consistent with the purposes of this chapter, than would development meeting the on-site dedication requirement of subsection 18.5.8.050.G.2.

b. That the alternative phasing proposal not meeting subsection 18.5.8.050.G.4 provided by the applicant provides adequate assurance that the affordable housing units will be provided in a timely fashion.

c. That the materials and amenities applied to the affordable units within the development, that are not equivalent to the market rate units per subsection 18.5.8.050.G.5, are necessary due to local, state, or federal affordable housing standards or financing limitations.

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# Approval Criteria

## Annexation

7. The total number of affordable units described in this subsection shall be determined by rounding up fractional answers to the nearest whole unit. A deed restriction or similar legal instrument shall be used to guarantee compliance with affordable criteria for a period of not less than 60 years for units qualified as affordable rental housing, or 30 years for units qualified as affordable for-purchase housing.

H. One or more of the following standards are met:

1. The annexation proposal shall meet the requirements of subsection 18.5.8.050.B, above.

2. A current or probable danger to public health exists within the proposed area for annexation due to lack of full City sanitary sewer or water services in accordance with the criteria in ORS chapter 222 or successor state statute.

3. Existing development in the proposed area for annexation has inadequate water or sanitary sewer service, or the service will become inadequate within one year.

4. The proposed area for annexation has existing City water or sanitary sewer service extended, connected, and in use, and a signed consent to annexation agreement has been filed and accepted by the City.

5. The proposed area for annexation is an island surrounded by lands within the City limits.

I. Exceptions and Variances to the Annexation Approval Criteria and Standards. The approval authority may approve exceptions to and variances from the approval criteria and standards in this section using the criteria in section 18.4.6.020.B.1, Exceptions to the Street Design Standards, or chapter 18.5.5, Variances.

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# Approval Criteria

## Outline Plan

A. The development meets all applicable ordinance requirements of the city.

B. Adequate key city facilities can be provided including water, sewer, paved access to and through the development, electricity, urban storm drainage, police and fire protection, and adequate transportation; and that the development will not cause a city facility to operate beyond capacity.

C. The existing and natural features of the land; such as wetlands, floodplain corridors, ponds, large trees, rock outcroppings, etc., have been identified in the plan of the development and significant features have been included in the common open space, common areas, and unbuildable areas.

D. The development of the land will not prevent adjacent land from being developed for the uses shown in the comprehensive plan.

E. There are adequate provisions for the maintenance of common open space and common areas, if required or provided, and that if developments are done in phases that the early phases have the same or higher ratio of amenities as proposed in the entire project.

F. The proposed density meets the base and bonus density standards established under this chapter.

G. The development complies with the street standards.

H. The proposed development meets the common open space standards established under section 18.4.4.070. Common open space requirements may be satisfied by public open space in accordance with section 18.4.4.070 if approved by the city of Ashland.



# Approval Criteria

## Limited Activities & Uses Permit

1. All activities shall be located as far away from streams and wetlands as practicable, designed to minimize intrusion into the Water Resource Protection Zone and disturb as little of the surface area of the Water Resource Protection Zone as practicable.

2. The proposed activity shall be designed, located and constructed to minimize excavation, grading, area of impervious surfaces, loss of native vegetation, erosion, and other adverse impacts on water resources.

3. On stream beds or banks within the bank-full stage, in wetlands, and on slopes of 25 percent or greater in a Water Resource Protection Zone, excavation, grading, installation of impervious surfaces, and removal of native vegetation shall be avoided except where no practicable alternative exists, or where necessary to construct public facilities or to ensure slope stability.

4. Water, storm drain, and sewer systems shall be designed, located and constructed to avoid exposure to floodwaters, and to avoid accidental discharges to streams and wetlands.

5. Stream channel repair and enhancement, riparian habitat restoration and enhancement, and wetland restoration and enhancement will be restored through the implementation of a mitigation plan prepared in accordance with the standards and requirements in section 18.3.11.110, Mitigation Requirements.

6. Long-term conservation, management and maintenance of the Water Resource Protection Zone shall be ensured through preparation and recordation of a management plan as described in subsection 18.3.11.110.C, except a management plan is not required for residentially zoned lots occupied only by a single-family dwelling and accessory structures.

# Approval Criteria

Tree

Removal

(*Tree That Is Not a Hazard*)

a) The tree is proposed for removal in order to permit the application to be consistent with other applicable Land Use Ordinance requirements and standards, including but not limited to applicable Site Development and Design Standards in part 18.4 and Physical and Environmental Constraints in part 18.3.10.

b) Removal of the tree will not have a significant negative impact on erosion, soil stability, flow of surface waters, protection of adjacent trees, or existing windbreaks.

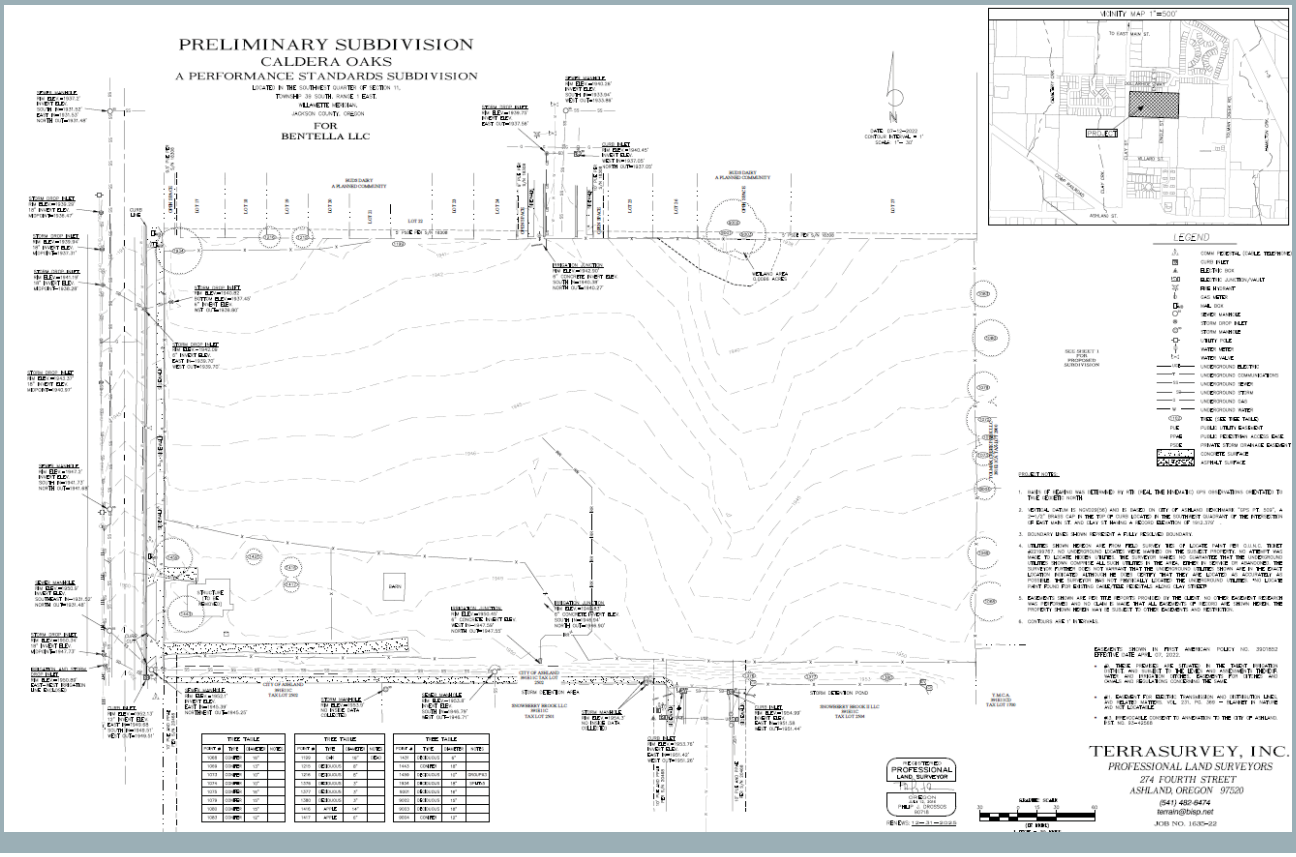
c) Removal of the tree will not have a significant negative impact on the tree densities, sizes, canopies, and species diversity within 200 feet of the subject property. The City shall grant an exception to this criterion when alternatives to the tree removal have been considered and no reasonable alternative exists to allow the property to be used as permitted in the zone.

d) Nothing in this section shall require that the residential density to be reduced below the permitted density allowed by the zone. In making this determination, the City may consider alternative site plans or placement of structures of alternate landscaping designs that would lessen the impact on trees, so long as the alternatives continue to comply with the other provisions of this ordinance.

e) The City shall require the applicant to mitigate for the removal of each tree granted approval pursuant to section 18.5.7.050. Such mitigation requirements shall be a condition of approval of the permit.

# CALDERA OAKS
## ANNEXATION, SITE DESIGN REVIEW, STREET STANDARDS EXCEPTION AND PERFROMANCE STANDARDS SUBDIVISION OUTLINE PLAN REVIEW

ksw **300 CLAY STREET**
CONCEPT DESIGN

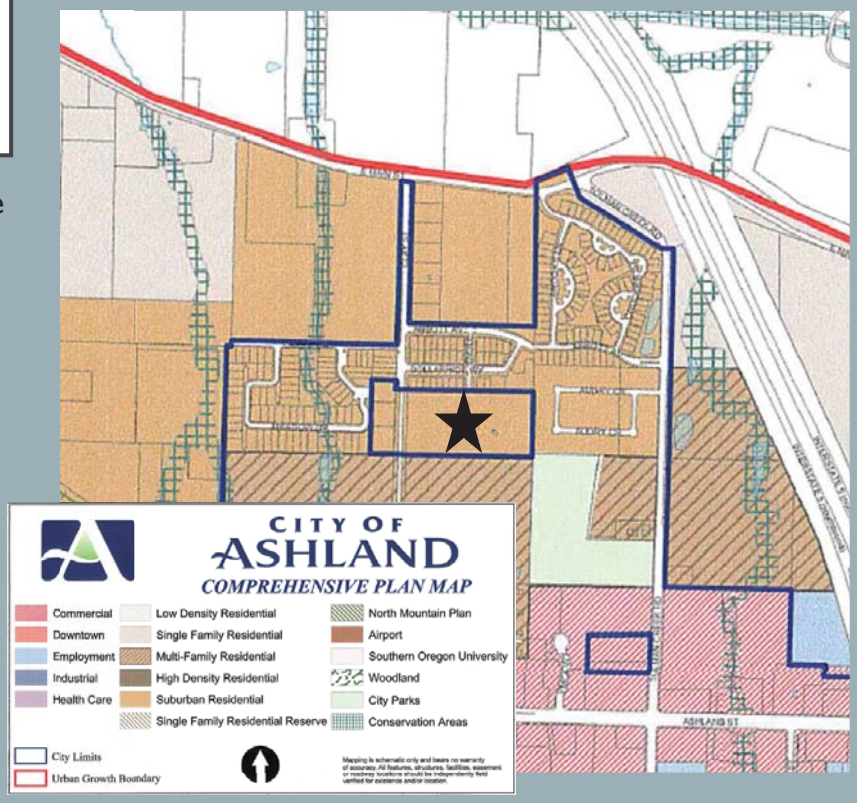


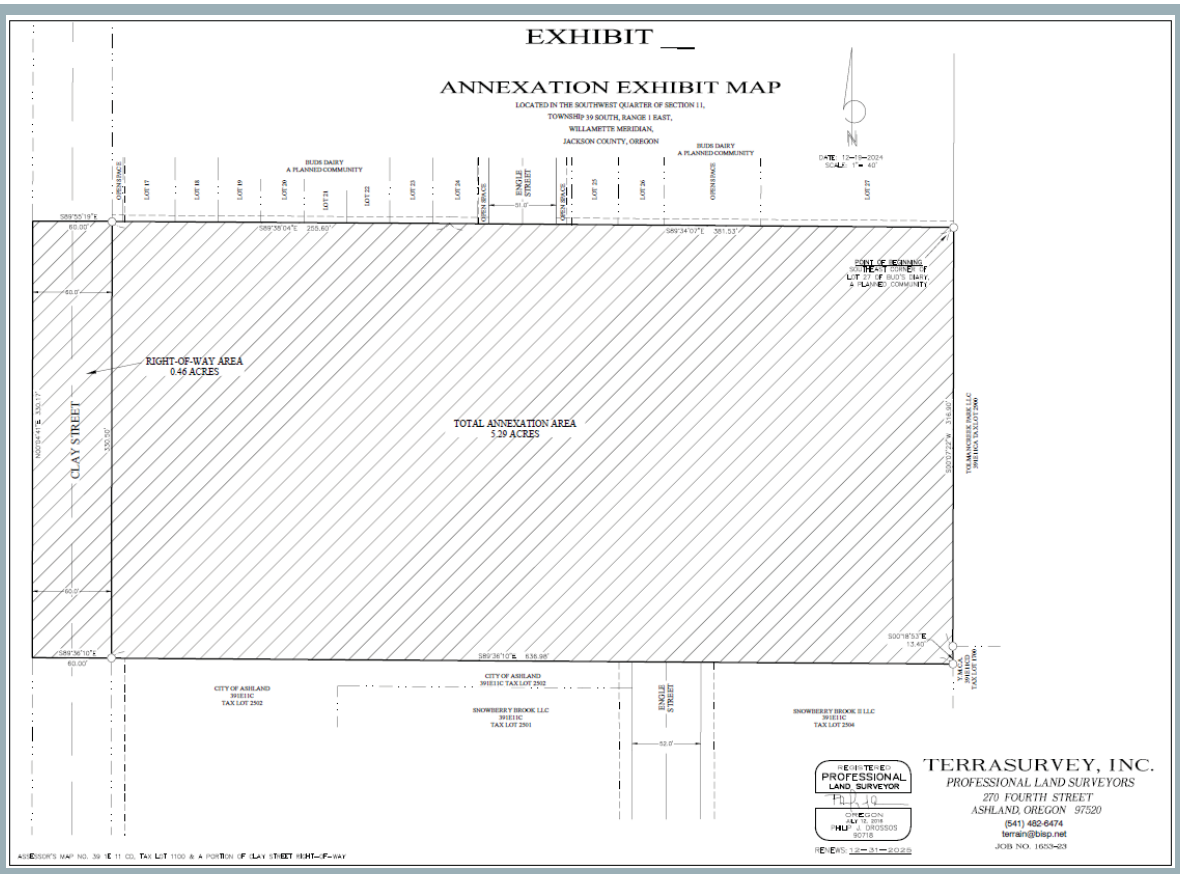

# ANNEXATION REQUEST

Property adjacent to the city limits on three sides.

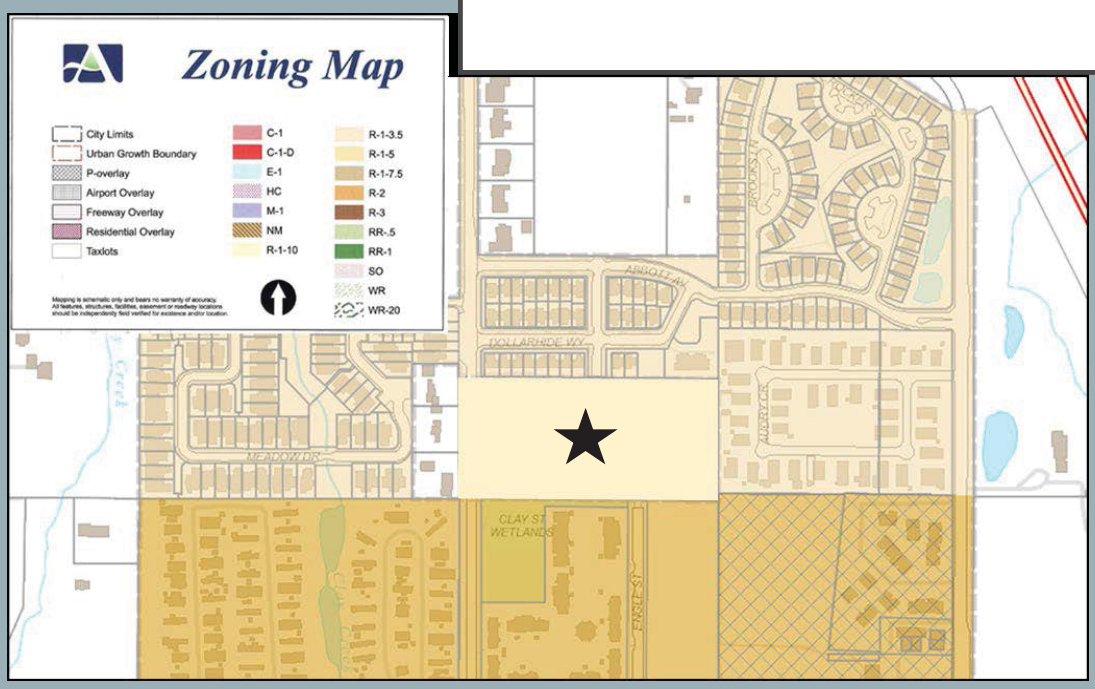
Comprehensive Plan Designation of the property is Suburban Residential.

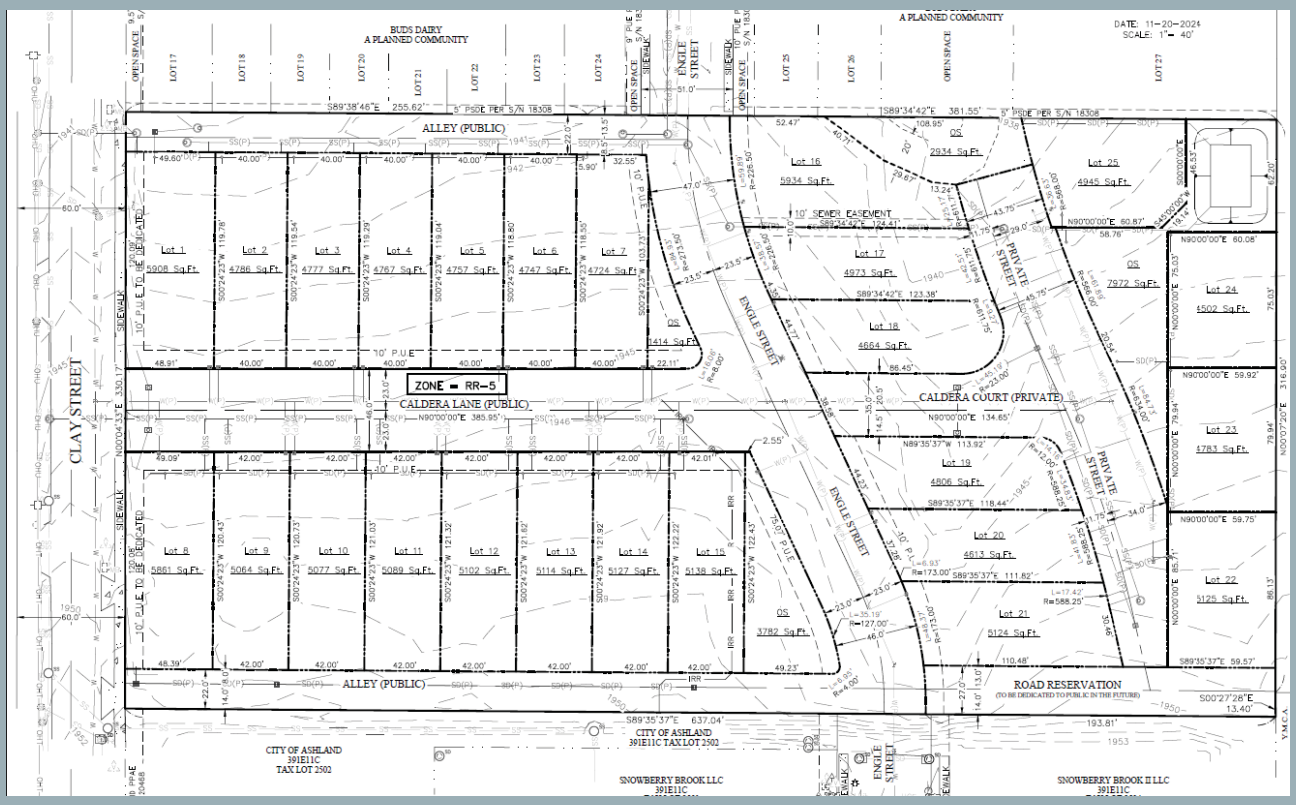
Annexation request is consistent with the Comprehensive Plan Designation



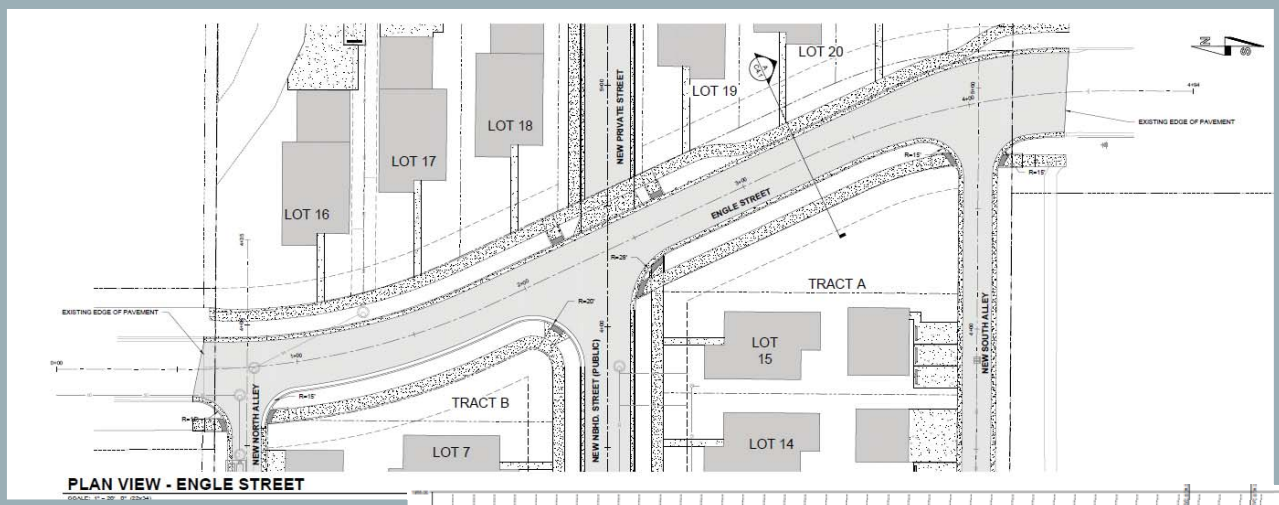



# PROPOSED ZONING

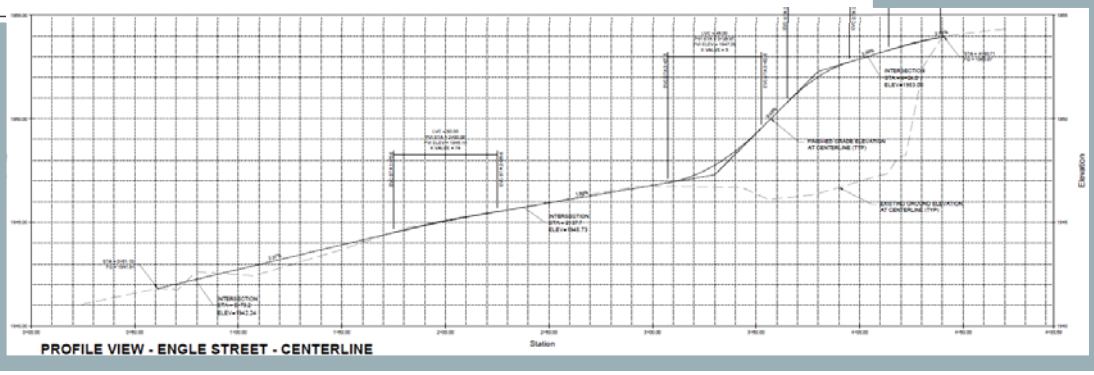




# SITE DEVELOPMENT PLAN




PLAN VIEW - ENGLE STREET

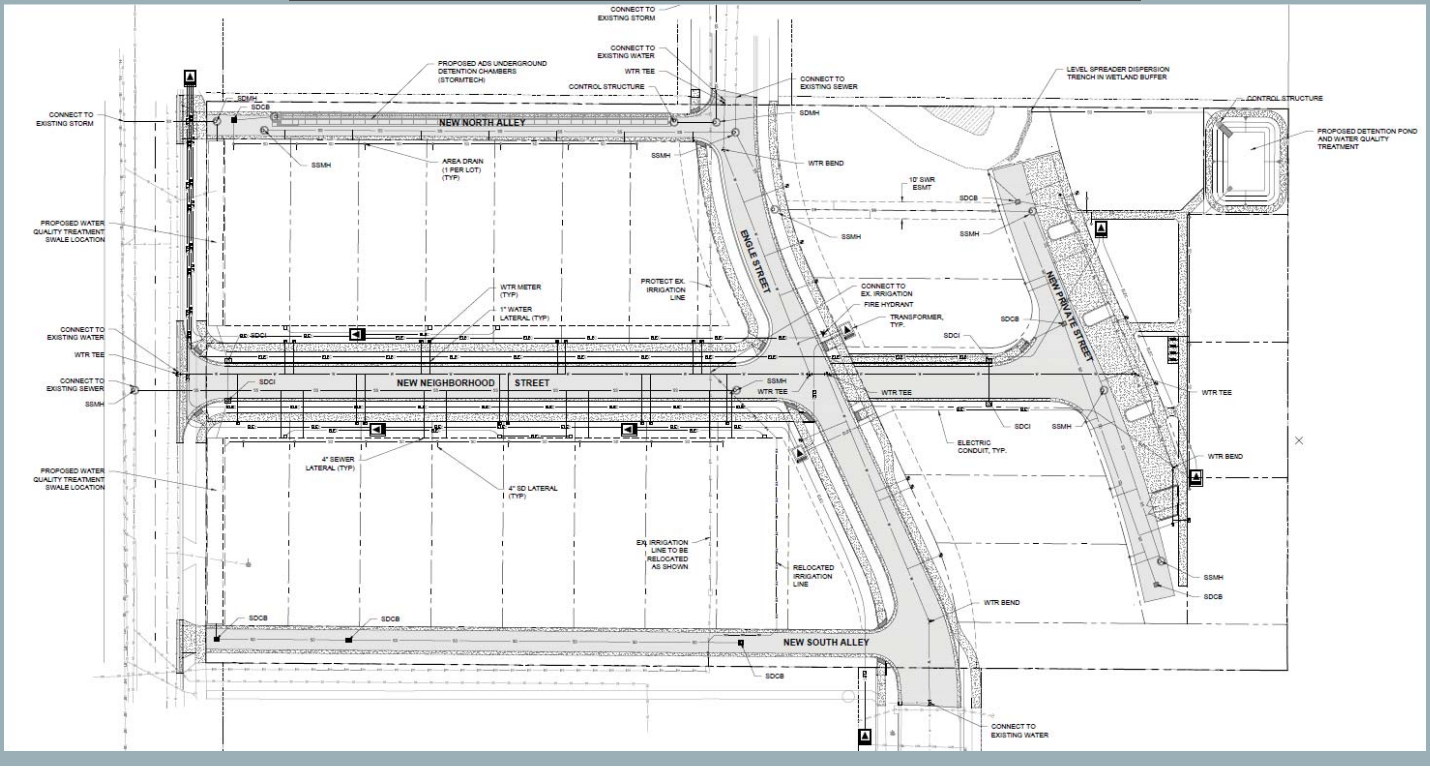



PROFILE VIEW - ENGLE STREET - CENTERLINE

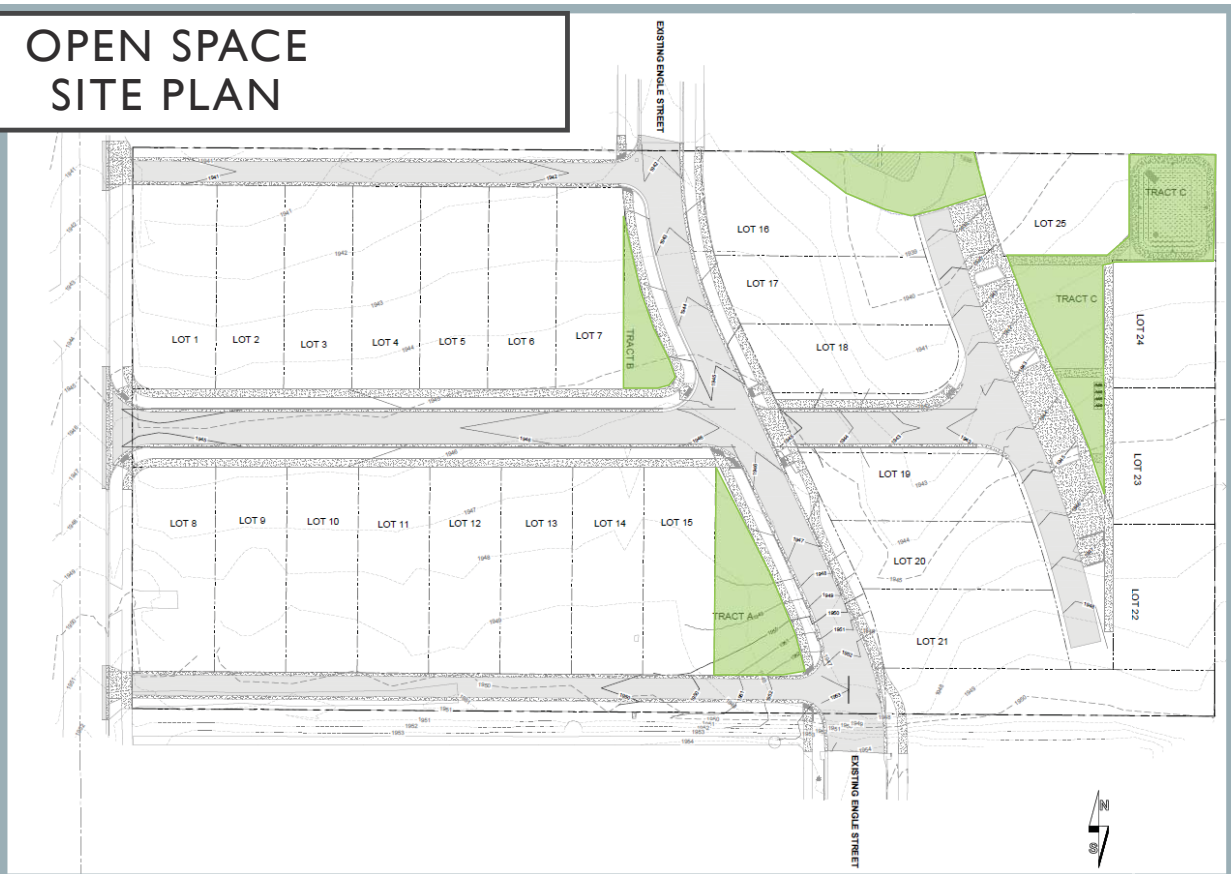
# TRIP GENERATION ASSESSMENT

- Due to the limited number of Peak Hour vehicle trips, a Transportation Impact Analysis is not required per Oregon Department of Transportation standards, City of Ashland standards nor Jackson County Standards.
- 24 AM Peak Hour trips and 31 PM Peak Hour trips with multiple dispersal points (Engle St. North to Abbot, then East to Tolman or West to Clay, Clay north to East Main and Clay south to Ashland Street).
- Clay Street is a Neighborhood Collector has a typical average daily trips for between 1,500 and 5,000 average daily trips.
- According to the Transportation Impact Analysis for a recent project in the vicinity (East Main Street Park) there were 1,500 vehicle trips on Clay Street at Abbott Avenue.

# PUBLIC INFRASTRUCTURE



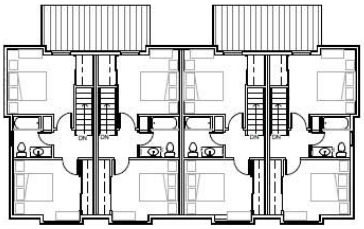

# OPEN SPACE SITE PLAN



## DETACHED RESIDENTIAL DWELLINGS

## MULTI-FAMILY DWELLINGS

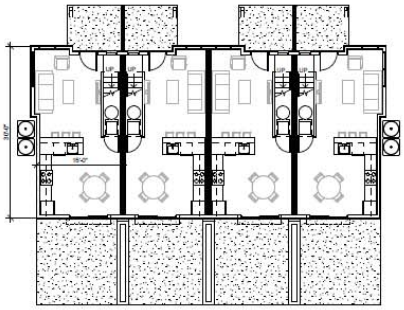
PERSPECTIVE 3



PLAN - LEVEL 2 2

432 S.F. PER END UNIT
420 S.F. PER MID UNIT

1/8" = 1'-0"

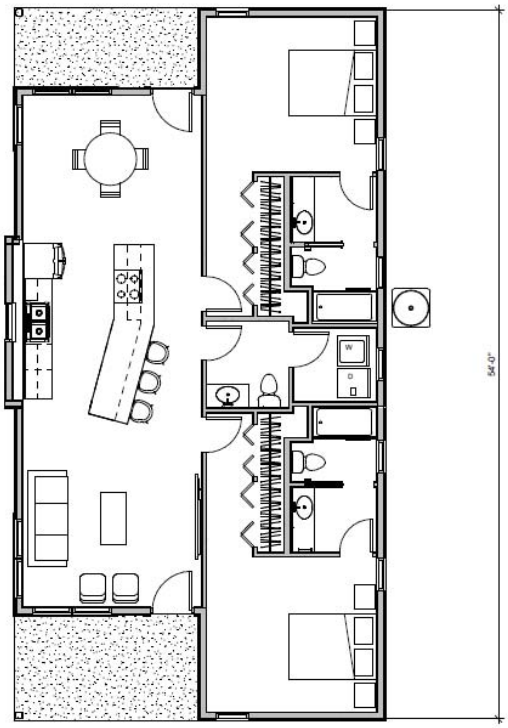


PLAN - LEVEL 1 1

454 S.F. PER END UNIT
441 S.F. PER MID UNIT

1/8" = 1'-0"

PERSPECTIVE 2

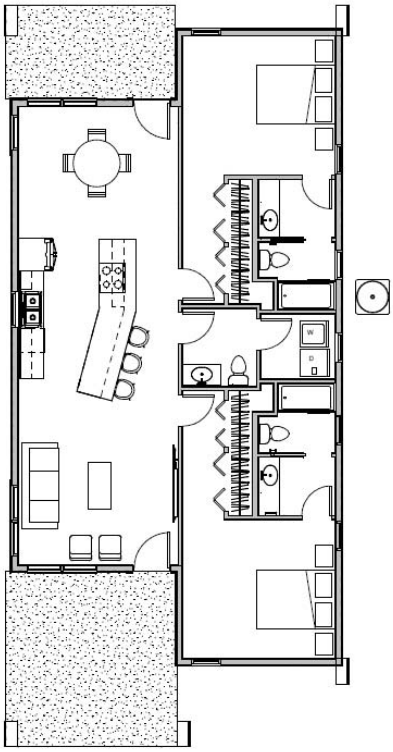



FLOOR PLAN - LEVEL 1 1

1,316 S.F.

1/4" = 1'-0"

PERSPECTIVE 2

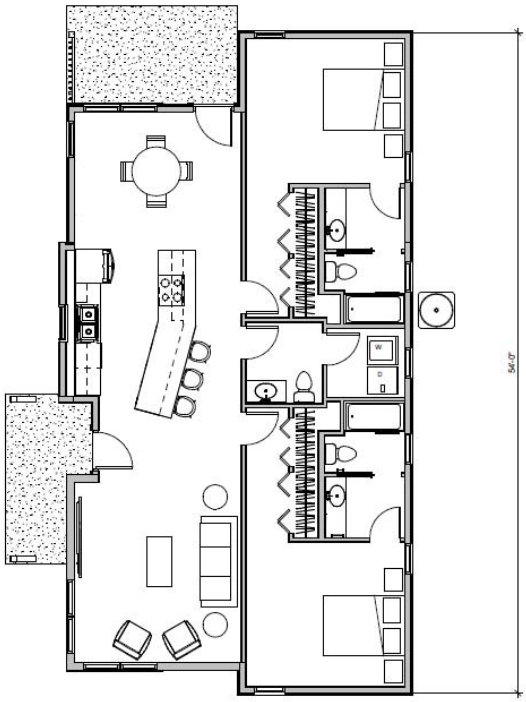


FLOOR PLAN - LEVEL 1 1

1,316 S.F.

1/4" = 1'-0"

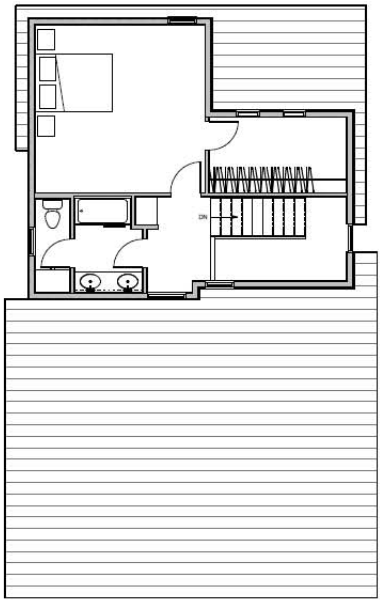
PERSPECTIVE 2




FLOOR PLAN - LEVEL 1 1

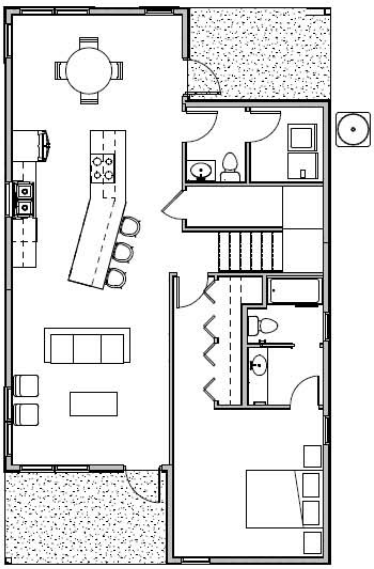
1,366 S.F. 1/4" = 1'-0"

PERSPECTIVE 3



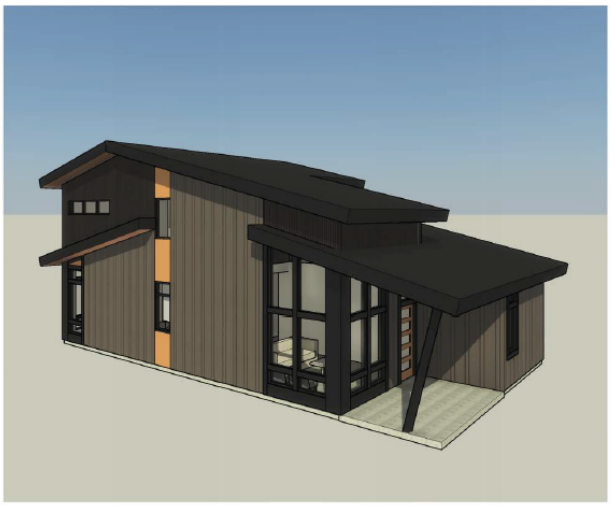
FLOOR PLAN - LEVEL 2 2

470 S.F. 1/4" = 1'-0"

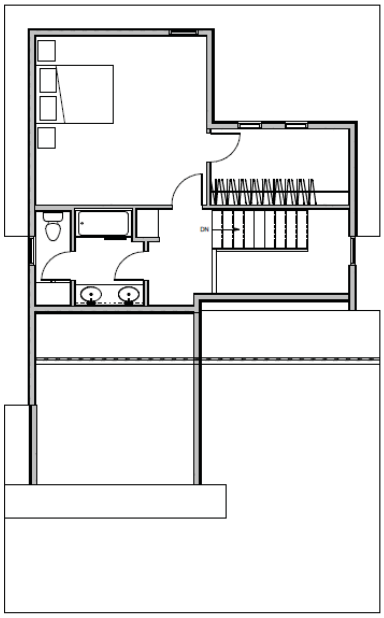


FLOOR PLAN - LEVEL 1 1

1,134 S.F. 1/4" = 1'-0"

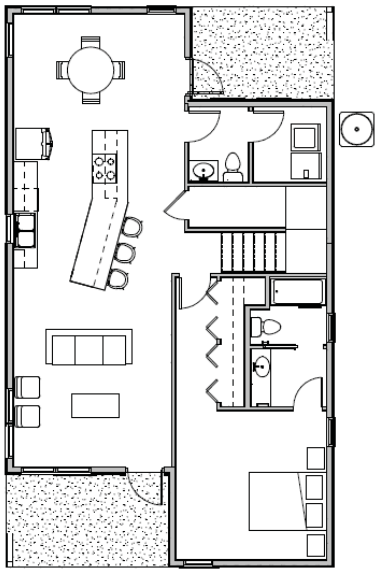


PERSPECTIVE 3



FLOOR PLAN - LEVEL 2 2

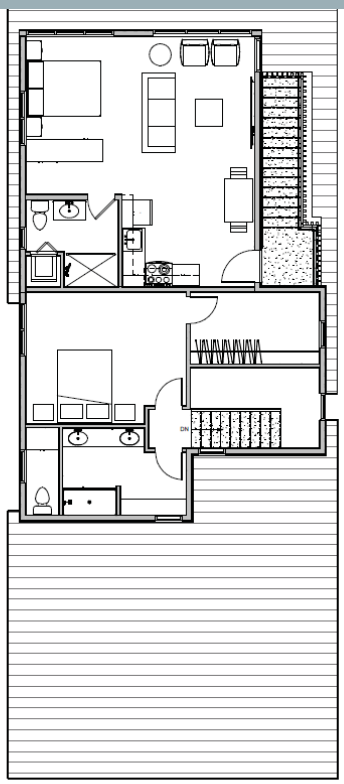
470 S.F. 1/4" = 1'-0"



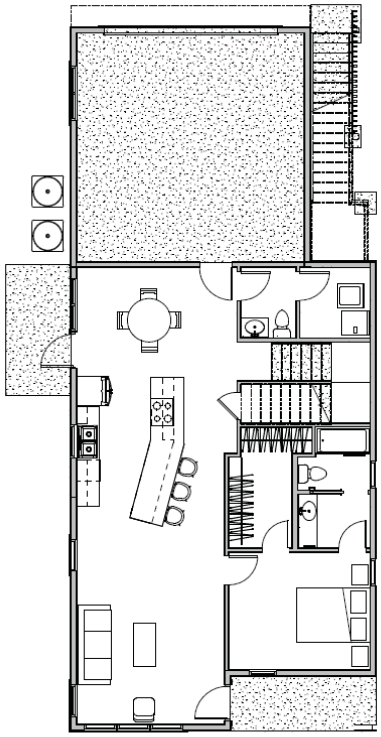
FLOOR PLAN - LEVEL 1 1

1,134 S.F. 1/4" = 1'-0"

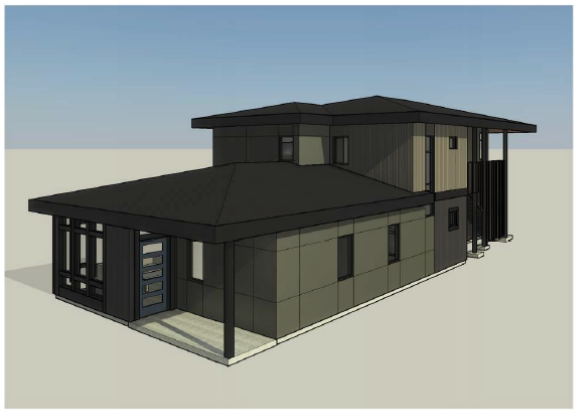
PERSPECTIVE 3



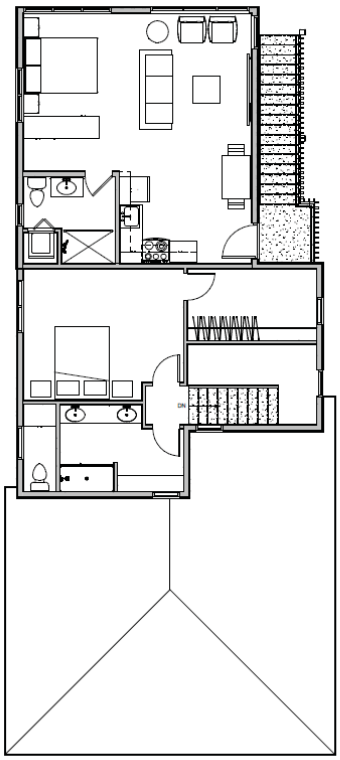
FLOOR PLAN - LEVEL 2 2



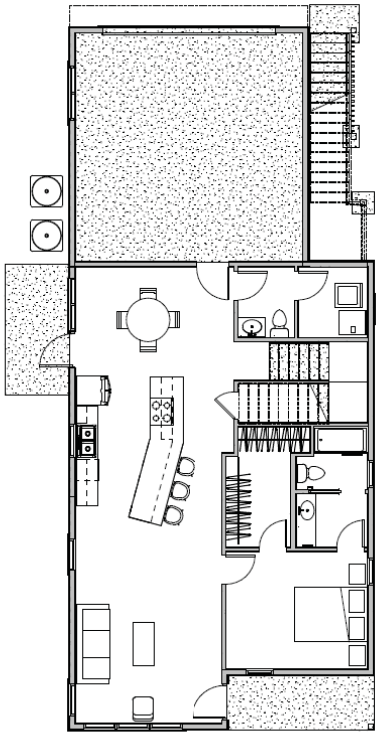
FLOOR PLAN - LEVEL 1 1



PERSPECTIVE 3

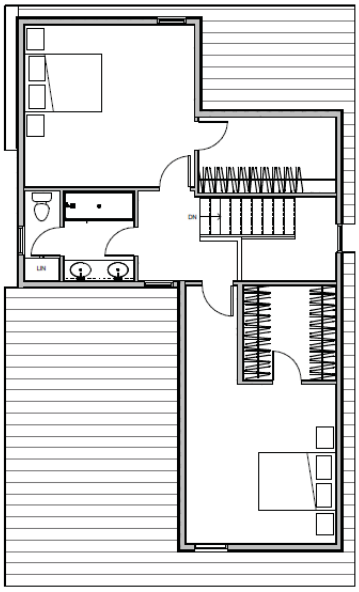


FLOOR PLAN - LEVEL 2 2



FLOOR PLAN - LEVEL 1 1

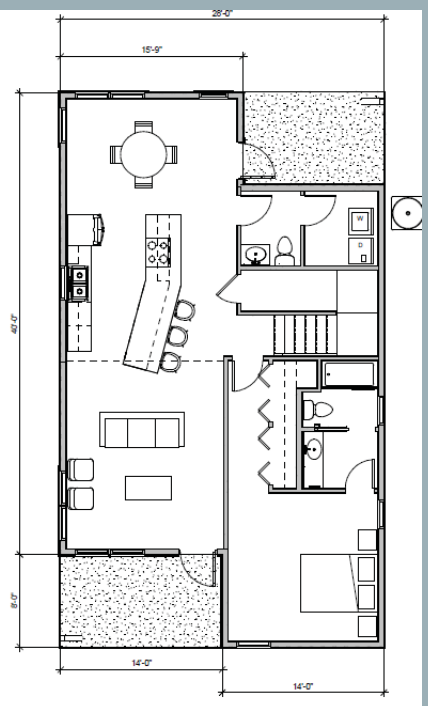
PERSPECTIVE 3



PLAN - LEVEL 2 2

789 S.F.

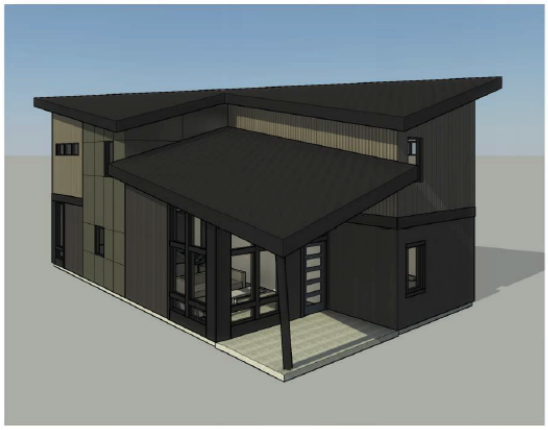
1/4" = 1'-0"



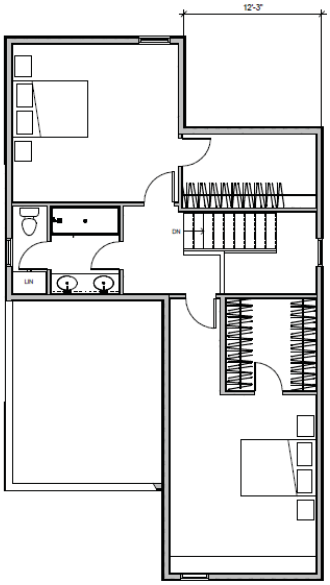

PLAN - LEVEL 1 1

1,134 S.F.

1/4" = 1'-0"



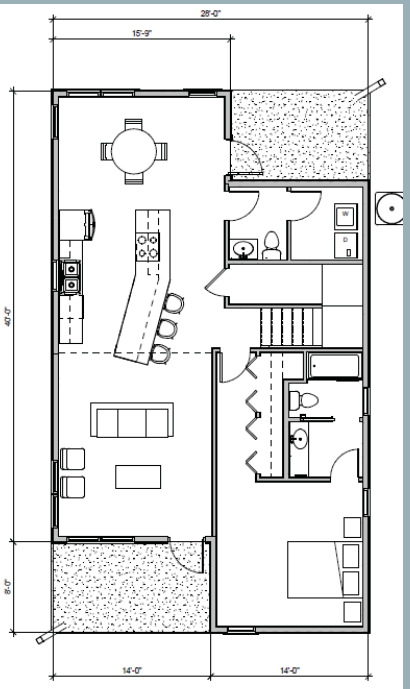
PERSPECTIVE 3




PLAN - LEVEL 2 2

789 S.F.

1/4" = 1'-0"

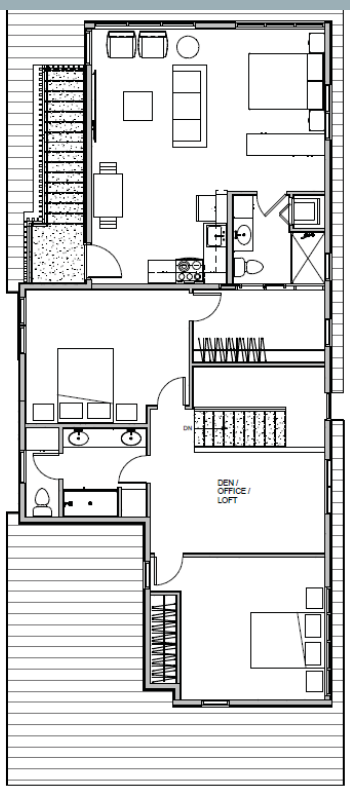



PLAN - LEVEL 1 1

1,134 S.F.

1/4" = 1'-0"

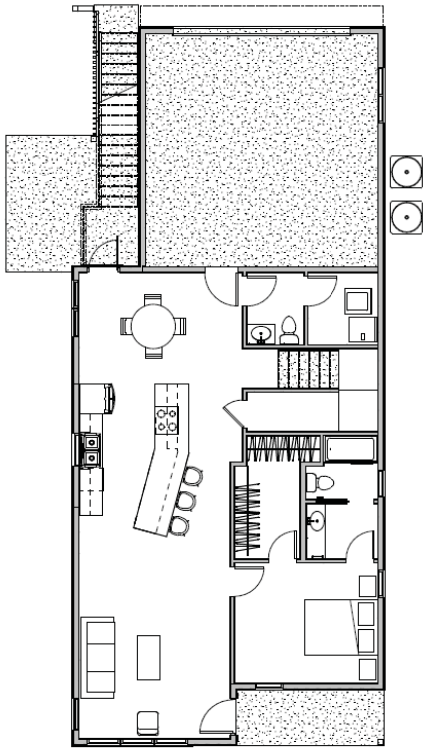
PERSPECTIVE 3




FLOOR PLAN - LEVEL 2 2

781 S.F.

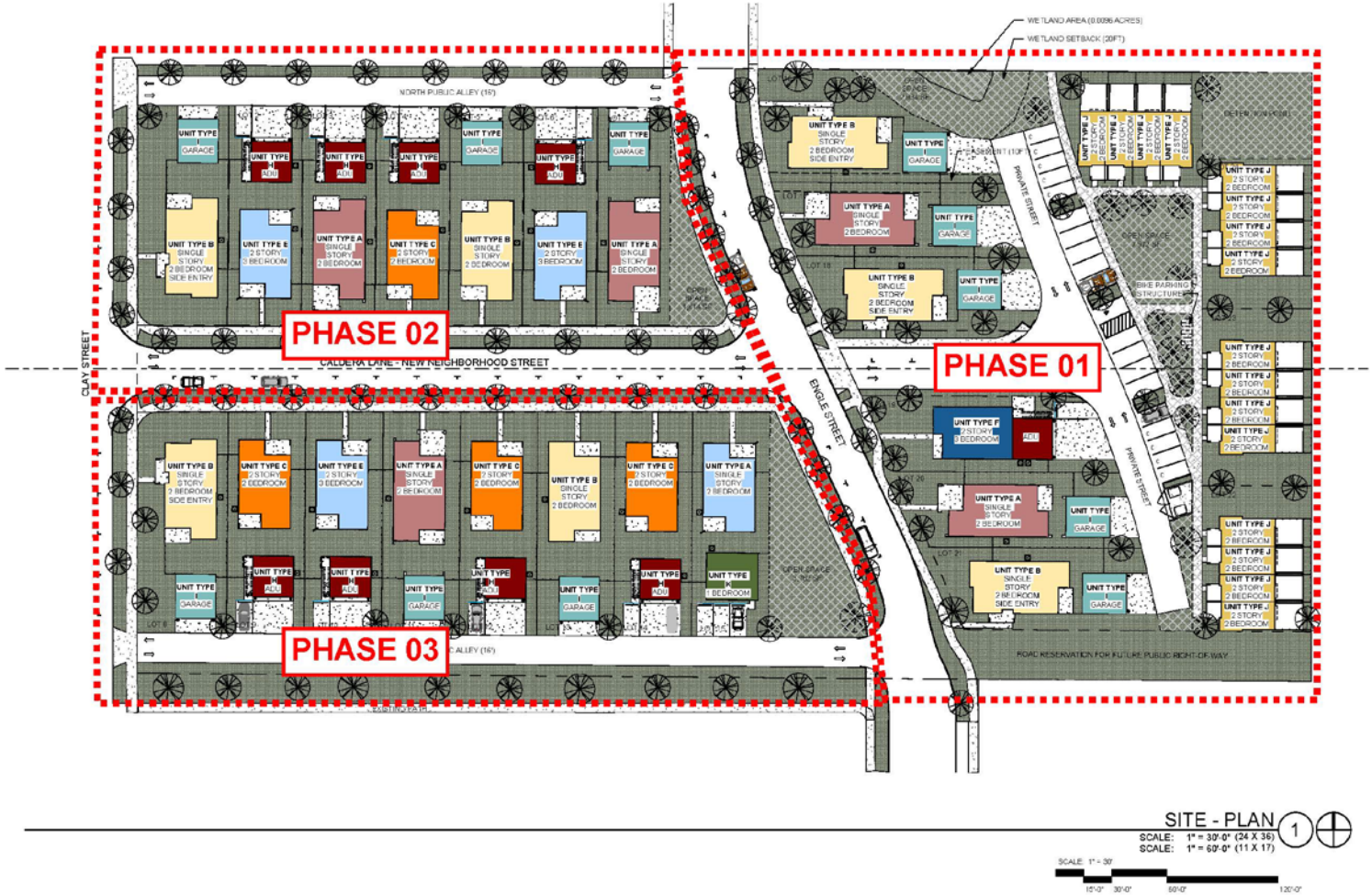
1/4" = 1'-0"



FLOOR PLAN - LEVEL 1 1

1,137 S.F.

1/4" = 1'-0"




SITE - PLAN (1)

SCALE: 1" = 30'-0" (24 X 36)
SCALE: 1" = 60'-0" (11 X 17)

SCALE 1" = 30'

15'-0" 30'-0" 60'-0" 120'-0"

## ZONING INFORMATION

**BASE ZONE:** R-1-3.5 (RESIDENTIAL - SUBURBAN)
**OVERLAY ZONES:**
**SPECIAL DISTRICTS:**
**MAP & TAX LOT:** 3S1E11CB - 1100
**ACERAGE:** 4.8 ACRES (209,088 SF)

## LEGEND - SITE PLAN

ASPHALT
CONCRETE
LANDSCAPE

## AUTOMOBILE PARKING

ON-STREET PARKING = 51 SPACES
OFF-STREET SURFACE PARKING = 52 SPACES
OFF-STREET GARAGE PARKING = 40 SPACES
**TOTAL - 143 SPACES**

## SITE AREA

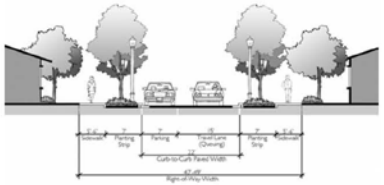
SITE AREA = 209,088 SF

## OPEN SPACE

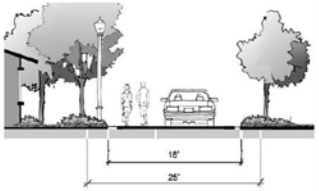
2,394 SF
1,414 SF
3,792 SF
7,972 SF
TOTAL 16,102 SF

16,102 / 209,088 = .077 = 7.7%

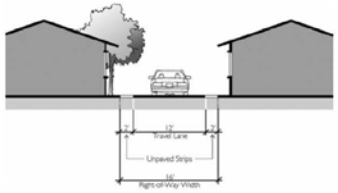
Neighborhood Street - Figure 18.4.6.040.G.4.b



Shared Street - Figure 18.4.6.040.G.8




Alley - Figure 18.4.6.040.G.6



ksw ARCHITECTS

# 300 CLAY STREET

CONCEPT DESIGN

2/11/2025

SITE PLAN & ZONING SUMMARY A0.1

## SITE - PLAN (1)

SCALE: 1" = 30'-0" (24 X 36)
SCALE: 1" = 60'-0" (11 X 17)

SCALE: 1" = 30'
15'-0" 30'-0" 60'-0" 120'-0"

## ZONING INFORMATION

**BASE ZONE:** R-1-3.5 (RESIDENTIAL - SUBURBAN)
**OVERLAY ZONES:**
**SPECIAL DISTRICTS:**
**MAP & TAX LOT:** 391E11CB - 1100
**ACERAGE:** 4.8 ACRES (209,088 SF)

## LEGEND - SITE PLAN

ASPHALT
CONCRETE
LANDSCAPE

## AUTOMOBILE PARKING

ON-STREET PARKING = 51 SPACES
OFF-STREET SURFACE PARKING = 52 SPACES
OFF-STREET GARAGE PARKING = 40 SPACES
**TOTAL - 143 SPACES**

## SITE AREA

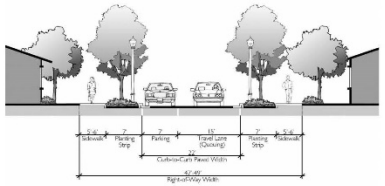
SITE AREA = 209,088 SF

## OPEN SPACE

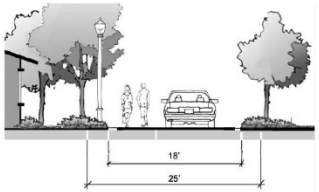
2,934 SF
1,414 SF
3,782 SF
7,872 SF
TOTAL 16,102 SF

16,102 / 209,088 = .077 = 7.7%

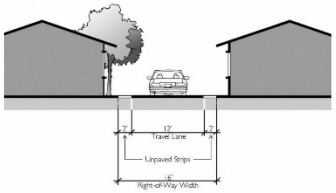
Neighborhood Street - Figure 18.4.6.040.G.4.b




Shared Street - Figure 18.4.6.040.G.8




Alley - Figure 18.4.6.040.G.6




ksw ARCHITECTS

# 300 CLAY STREET

CONCEPT DESIGN
2/11/2025

SITE PLAN & ZONING SUMMARY A0.1

# Ordinance 3257

## Revision to AMC 9.04 Weeds and Noxious Vegetation

### Revisions

9.04.005 Definitions

B. Fire Chief: the City of Ashland Fire Chief or ~~his/her~~ **their** authorized designee.



# Ordinance 3257

## Revision to AMC 9.04 Weeds and Noxious Vegetation

### Revisions

9.04.005 Definitions

G. Summer season: between May ~~15~~ **1st** and ~~September 30~~ **October 15th** of any year, or the end of fire season as declared by the Oregon Department of Forestry, whichever is later.

# Ordinance 3257

## Revision to AMC 9.04 Weeds and Noxious Vegetation

### Revisions

9.04.020 Responsibility of Owner – Removal of Weeds

The owner of any lot or parcel of land within the limits of the City of Ashland shall cut and/or remove weeds growing thereon, and on adjacent and abutting rights-of-way, between May ~~15th~~ **1st** and June ~~15th~~ **1st** of each year. It shall be the duty of an owner to continue to cut and remove the weeds throughout the summer season, or any other time of year when deemed a fire, health, or traffic hazard. (Ord. 3159 § 1, amended, 09/18/2018; Ord. 3009, amended, 04/20/2010)



# Ordinance 3257

## Revision to AMC 9.04 Weeds and Noxious Vegetation

### Revisions

9.04.040 Notice to Abate - Contents

In case of failure or neglect of any such agent, owner or occupant to cut weeds and grass and shrubbery as herein provided, the ~~City Recorder~~ **Code Compliance Officer** shall cause to be served on such agent, owner, and/or occupant a notice, describing the property with convenient certainty by its legal description or by the street number of the house, requiring such owner or agent and/or occupant to cut said weeds, grass, and shrubbery within ten (10) days from the service thereof, or that the City will require the same to be done, and the cost thereof charged as a lien against said property. (Ord. 3159 § 1, amended, 09/18/2018; Ord. 1141 § 4, amended, 1951)

# Ordinance 3257

## Revision to AMC 9.04 Weeds and Noxious Vegetation

### Revisions

9.04.050 Notice to Abate – Service – Removal by City – Lien

….Fire Chief **(or authorized designee)** shall cause the same to be done and shall file with the ~~**Council**~~ **City Recorder and Finance Department** a verified itemized statement of the expenditure occasioned thereby, and the Recorder shall cause notice to be served upon the owner, agent, or occupant in the manner hereinbefore described, such statement will be considered…

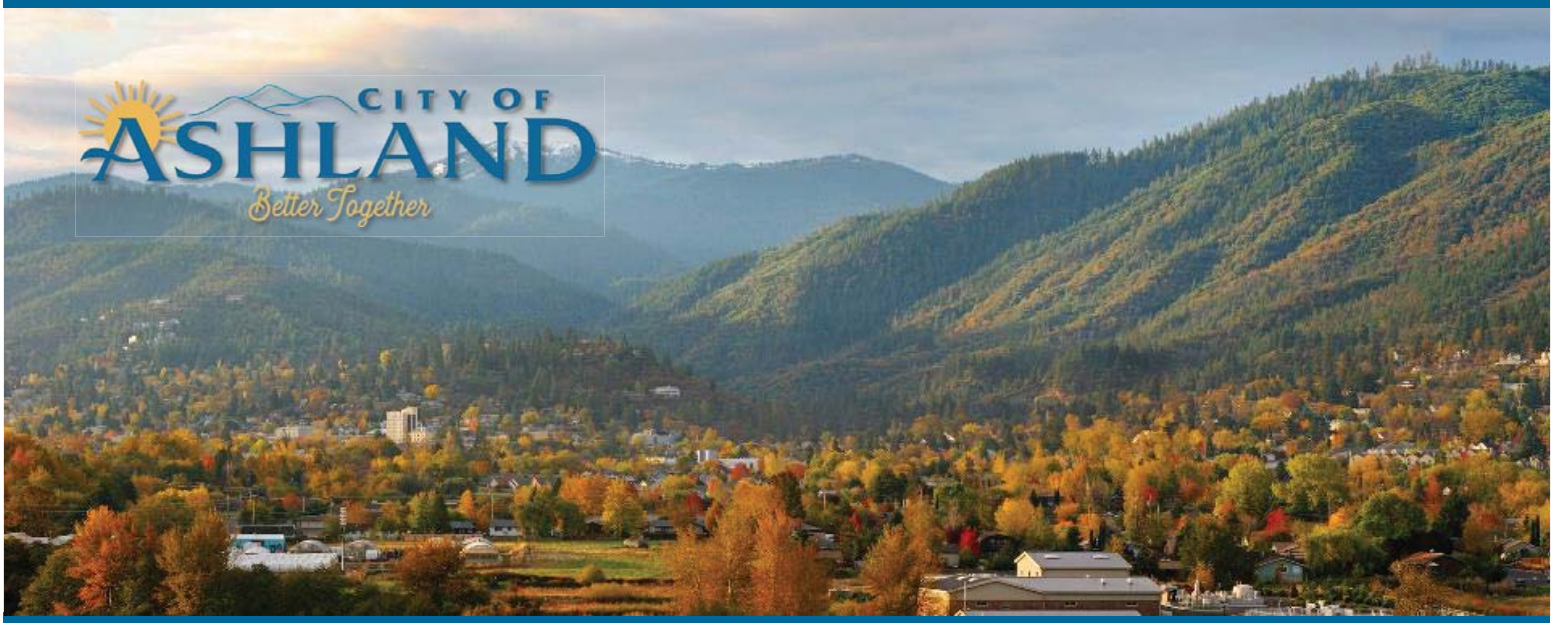


# Ordinance 3257

## Revision to AMC 9.04 Weeds and Noxious Vegetation

### Revisions

9.04.050 Notice to Abate – Service – Removal by City – Lien
…determined by the ~~**Council**~~ **City Recorder** and a lien declared upon the property involved~~,~~**.** **Appeals shall be filed with the municipal court no more than 10 days following the placement of said lien, in accordance with AMC 2.30.** ~~**the time of which meeting shall be specified in the notice, more than ten (10) days from the giving of the same, and the Council shall at such meeting hear any objections to such statement, and by ordinance determine the correctness of the same, and declare such corrected amount a lien upon the property benefitted and instruct the Recorder to enter the same upon the City docket of liens in the same manner and with the same effect that street improvement liens and sewer liens are entered, and said lien shall have the same force and effect as such street improvement and sewer liens, and shall be certified to the county assessor in the same manner.**~~




# Thank you

# Capital Improvement Plan: Adoption

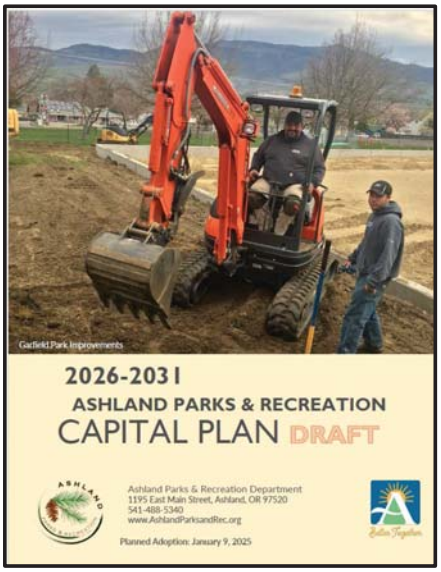
Ashland City Council Meeting | April 2, 2025

CAPITAL IMPROVEMENT PLAN

## 2026-2031 CIP

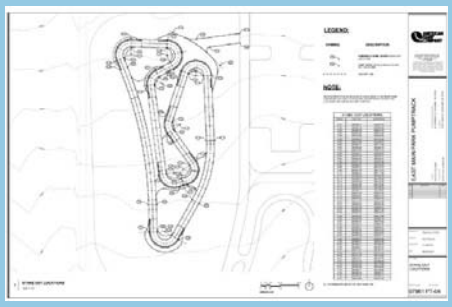
**Acknowledgment**

- Rachel Dials, Deputy Director
- Kevin Caldwell, Parks Superintendent
- Bill Miller, Parks Supervisor
- Wes Casale, Parks Supervisor
- Jason Minica, Parks Supervisor
- Brian Weaver, Golf Manager
- Brandon Terry, Senior Administrative Analyst



## Capital Budget

Biennial budget for captial projects



## Capital Program

Four year plan beyond capital budget

CAPITAL IMPROVEMENT PLAN

## Project Types

- Preventative Maintenance
- Major Maintenance
- Park Enhancements
- Planning
- Land Acquisitions
- Vehicles & Equipment

CAPITAL IMPROVEMENT PLAN

# Process

1. **System Inventory & Project Scoring**
   1. September to November 2024
2. **Presentation of Draft CIP**
   1. 11/13/2024
3. **Public Comment Period**
   1. 30 days online (11/15-12/15 2024)
4. **Public Testimony**
   1. December 7, 2024 APRC Meeting
5. **Final CIP Drafting**
   1. After public comment period ends
6. **Review and Adoption by APRC**
   1. January 8, 2025 APRC Meeting
7. Review and Adoption by City Council
   1. April 2, 2025 City Council Meeting

CAPITAL IMPROVEMENT PLAN

# Identified Need

| Total by Category - Identified Need | | |
|---|---|---|
| Preventative Maintenance | $ | 1,465,040 |
| Major Maintenance | $ | 21,050,310 |
| Park Enhancements | $ | 13,186,000 |
| Planning | $ | 407,000 |
| Acquisitions | $ | 14,339,920 |
| Vehicles / Equipment | $ | 303,000 |
| **Total Deferred/Capital Need** | **$** | **50,751,270** |

CAPITAL IMPROVEMENT PLAN

# CIP - Budget

Ashland Parks & Recreation Department - Capital Improvement Program

The FY 26 through FY 31 Parks Capital Im
program projects are scheduled based
funding. Parks, with citizen input, recor

| Category | FY 26 | FY 27 |
|---|---|---|
| Annual Totals by Category | | |
| Preventative Maintenance | $ 275,000 | $ 275,000 |
| Major Maintenance | $ 1,800,000 | $ 525,000 |
| Park Enhancements | $ 1,900,000 | $ 750,000 |
| Planning | $ 75,000 | $ 10,000 |
| Acquisitions | $ 250,000 | $ 250,000 |
| Vehicles / Equipment | $ 118,000 | $ - |
| | | |
| Annual CIP | $ 4,418,000 | $ 1,810,000 |

| Total by Category - Identif | |
|---|---|
| Preventative Maintenance | $ 1,465,040 |
| Major Maintenance | $ 21,050,310 |
| Park Enhancements | $ 13,186,000 |
| Planning | $ 407,000 |
| Acquisitions | $ 14,339,920 |
| Vehicles / Equipment | $ 303,000 |
| Total Deferred/Capital Need | $ 50,751,270 |

CAPITAL IMPROVEMENT PLAN

# Key Projects

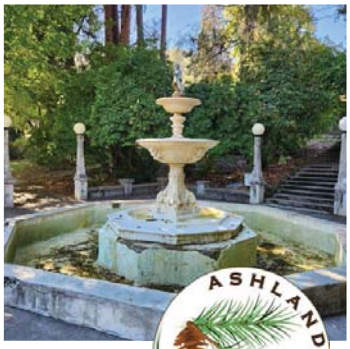
## Preventative Maintenance

- Pavement Preservation Projects
- Hazard Trees
- Building & Facilities

**Annual Allocation**

## Major Maintenance

- Hunter Park – Tennis Courts Rehabilitation
- Lithia Park – Butler-Perozzi Fountain Restoration
- Irrigation Controllers
- ADA Improvements
- Siskiyou Mountain Trail re-route



CAPITAL IMPROVEMENT PLAN

# Key Projects

## Park Enhancements

- East Main – Phase I

## Planning

- Parks, Recreation, Open space & Seniors Plan

# City Council Meeting Business Meeting

Capital Improvement Program 2025-2027

April 1, 2025

## XII. New Business

### 2025-2027 Capital Improvement Plan Adoption & 2028-2031 Lookahead

- Capital Planning "The Roadmap" –Master Plans & Facility Plans
  - Identify System Needs – 20 Year Window
  - Define Level of Service Goals
  - Prioritize – Regulatory, Life Cycle, Deficiency, Capacity
  - Reduce Risk and Increase Resiliency
- Update every 7-10 years
  - Include Council Goals and Priorities
  - Assess Regulatory Changes
  - Assess Changes in Growth and Development
  - Financial Analysis
- Evaluate and Make Appropriate Changes Every Budget Cycle
  - Layer Project Priorities
    - Assess Utility Components with Street Improvements

## 2025-2027 Capital Improvement Plan Adoption & 2028-2031 Lookahead

- Capital Program 2-year, 6-year
- Budgeting – 2025/27 Budget Biennium
  - 2-year appropriation; forecast spending
  - Distinct Council Project Approvals
    - Master Plans
    - CIP Adoption
    - Budget Adoption
    - Rate Analysis & Project Funding
    - Feasibility Studies
    - Preliminary Engineering
    - Final Engineering
    - Construction & Construction Administration



## 2025-2027 Capital Improvement Plan Adoption

### Project Narratives

- Project Description
- Project Cost & Funding
- Project Timing & Duration

- 2 – Year Narrative Book
  - 2/6 year spreadsheets

Street Fund - Roadway

Project Name: **Clay Street - Faith Avenue to Siskiyou Boulevard** Proj #: 2020-09

Total Project Cost: **Two Year Cost $2,916,211 (Total Project $7,190,217)** Duration: Multiple years

| | FY26 | FY27 |
|---|---|---|
| Expenses: | | |
| Design | $1,711,211 | $1,711,211 |
| Construction | | |
| Revenues: | | |
| Fees | $175,741 | $175,741 |
| SDCs | | |
| Grant | $1,535,469 | $1,535,469 |
| Other | | |

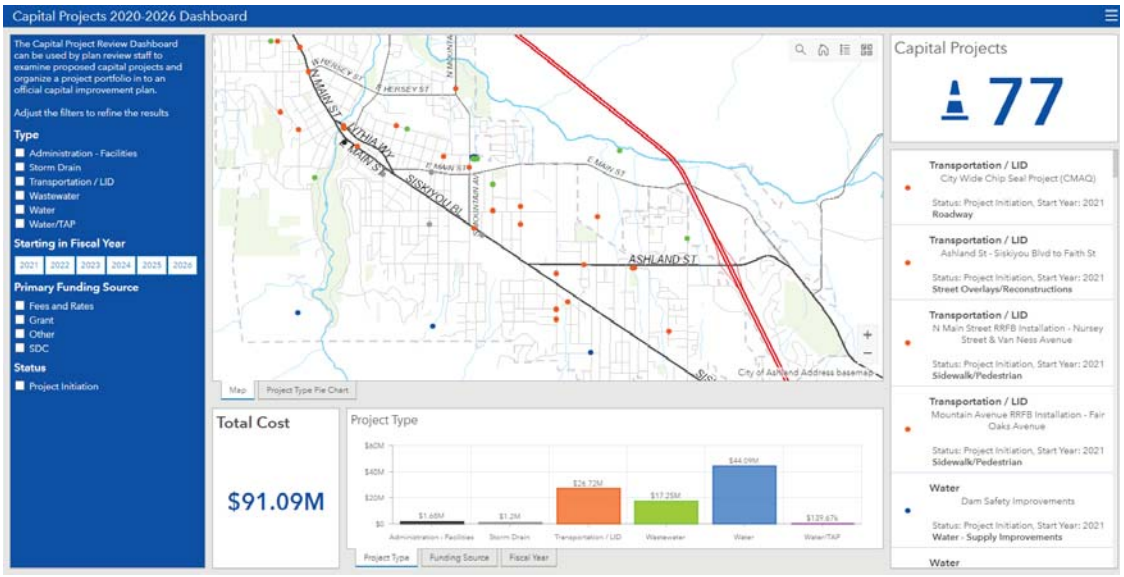
**Explain "Other":** Funded by a Rogue Valley Metropolitan Organization Grant with Jackson County providing a percentage of the total match as part of the jurisdictional transfer agreement.

**Anticipated Long Term Expenses:** Project is grant funded with Jackson County providing a portion of the required match and the City providing the remaining. Additional grant funding may need to be requested once the initial project development, right of way acquisition and design phases have been completed. After completion the improvement will become part of the street fund and costs will include overlay's as required for a pavement preservation program.

**Description:** Existing Clay St. from Faith Ave. to Siskiyou Blvd. is nominally 19-feet wide road with no bike or ped facilities. The street serves low, medium and high-density housing, a city park and a private elementary school, and connects the neighborhood to Ashland St. and Siskiyou Blvd. The purpose of the project is to add bike and pedestrian facilities with curb, gutter, sidewalk, and underground drainage to facilitate the addition of the bike and pedestrian facilities. Per the Ashland TSP, the bike facility will be a bike boulevard, a shared lane with a speed reduction to 20 MPH. The existing street will also be improved to match the new facilities.

# 2025-2027 Capital Improvement Plan Adoption

## Capital Dashboard






# 2025-2027 Capital Improvement Plan Adoption

## Critical Projects

### Water

- Water Treatment Plant Project
- Dam Safety Project
- East and West Forks Transmission Line

### Wastewater

- Wastewater Headworks

### Transportation

- North Mountain Rehabilitation
- Oak Street Rehabilitation
- Clay Street Improvements

### Planning Efforts

- Safe Streets For All Action Plan
- Transportation System Plan Update
- Central Ashland Bike Path Feasibility Study

# 2025-2027 Capital Improvement Plan Adoption

## Next Steps

- Move through budget adoption process
- Begin project implementation
- Continue with projects underway



# 2025-2027 Capital Improvement Plan Adoption

## Potential Motion

I move to accept the two (2) year Capital Improvement Plan with the six-year overview.

# Thank you

# Council Business Meeting

**Date**: April 15, 2025

| | |
|---|---|
| **Agenda Item** | Budget Transfers and Budget Supplemental |
| **From** | Mariane Berry, Finance Director |
| **Contact** | mariane.berry@ashland.or.us |

## SUMMARY

During the biennium there are times that budget adjustments are necessary.

Per ORS 294.463(3), transfers authorized by resolution can occur either within a fund, or from one fund to any other fund. There is no 10% requirement for these types of transfers.

Per ORS 294.471(4), a Budget Supplemental is required when transferring appropriation authority to an appropriation category that doesn't already exist in the adopted budget. It must also adjust expenditures by 10% or less for it to be adopted at a regular scheduled Council meeting. The attached budget supplement does not increase appropriations by more than 10%.

A public hearing is not necessary for these budget transfers and supplement.

## POLICIES, PLANS & GOALS SUPPORTED

Administrative/Governance Goal:

“To ensure ongoing fiscal ability to provide desired and required services at an acceptable level.”

## BACKGROUND AND ADDITIONAL INFORMATION

Oregon budget law provides for a mid-cycle amendment to the budget through resolution transfers and the supplemental budget process.

These changes consist of 1) transferring appropriation authority between appropriation categories or funds, or 2) a budget supplement of less than ten percent of the budgeted fund. Oregon budget law allows adoption by Council Resolution with no public hearing required.

The following budget transfers and supplement are as follows:

***1. Budget Transfer - Tourism Fund*** : To transfer appropriation from Materials & Services to Personnel to account for underestimated personnel costs (Resolution Transfer per ORS 294.463(3)).

| | |
|---|---|
| Transfer from Materials & Services | $25,000 |
| Transfer to Personnel | $25,000 |

***2. Budget Transfer - Capital Improvements Projects (CIP) Fund*** : To transfer budget from the General Fund Faciltiies to the CIP Fund to address costs that were expended in the CIP Fund but originally budgeted in the General Fund for Community Center & Pioneer Hall (Resolution Transfer per ORS 294.463(3)).

| | |
|---|---|
| Transfer from General Fund Facilities | $720,000 |
| Transfer to CIP Fund | $720,000 |

***3. Budget Supplement - Insurance Fund***: To transfer budget from Materials & Services to Personnel to account for a legal settlement that was paid out of the Personnel line versus Materials & Services due to the stipulation of the settlement. Per Local Budget Law this is considered a Budget Supplement as the

Personnel line for the Insurance Fund is a new appropriation category (Budget Supplement per ORS 294.471(4)).

| | |
|---|---|
| Transfer from Materials & Services | $137,398 |
| Transfer to Personnel | $137,398 |

**FISCAL IMPACTS**

These transfers assist in cleaning up the budget appropriations for the closing of the biennium to its proper fund and/or appropriation category.

**SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS**

Staff suggests that Council adopt the attached resolutions by consent.

I move to adopt Resolution 2025-05 approving the Budget Supplemental and Resolution 2025-06 aproving the Budget Transfers for the biennium 2023-2025 as outlined accordingly.

**REFERENCES & ATTACHMENTS**

1. Budget Transfer Request - Tourism
2. Budget Transfer Request - CIP
3. Budget Transfer Request - Insurance
4. Resolution No 2025-06_Budget Transfers_Tourism_CIP
5. Resolution No 2025-05_Budget Supplemental__InsuranceFund

# Budget Transfer Request

Date: 04/02/2025

Department: Admin

## Explanation of Request

Need to increase appropriation level in Personnel Services so as to stay within the City's Budgetary Compliance

## Transfer From

| Account Number | Line-Item Name | Amount |
|---|---|---|
| 017820.604100 | Tourism-Professional Services | $ 25,000.00 |
| | | |
| | | |
| | | |
| | | |
| | | |
| | **Total Transfer Out** | $ 25,000.00 |

## Transfer To

| Account Number | Line-Item Name | Amount |
|---|---|---|
| 017820.510100 | Tourism-Regular Employees | $ 25,000.00 |
| | | |
| | | |
| | | |
| | | |
| | | |
| | **Total Transfer In** | $ 25,000.00 |

Requested By: Miranda Iwamoto

Approved By: Mariane Berry for Jordan Rooklyn

Department Head

**RE: Tourism Transfer**

**From** Jordan Rooklyn <jordan.rooklyn@ashland.or.us>
**Date** Mon 4/7/2025 10:34 AM
**To** Mariane Berry <mariane.berry@ashland.or.us>
**Cc** Sabrina Col or.us>; Miranda Iwamoto <miranda.iwamoto@ashland.or.us>

Reset Form

Hi Mariane,

That looks good to me. Also, below are my End of Year updates for the Tourism Fund Materials & Services (wasn't sure how/who to share them with).

# Budget Transfer Request

Date: 04/02/2025

Department: PW

## Explanation of Request

Move monies budgeted in General Fund Facilities to the Capital Improvements Fund to cover the improvement costs of both Pioneer Hall and Community Center.

## Transfer From

| Account Number | Line-Item Name | Amount |
|---|---|---|
| 088400.704200 | Facilities - Capitalized Projects | $ 720,000.00 |
| | | |
| | | |
| | | |
| | | |
| | | |
| | **Total Transfer Out** | $ 720,000.00 |

## Transfer To

| Account Number | Line-Item Name | Amount |
|---|---|---|
| 990110.902410 | To Capital Improvements Fund | $ 720,000.00 |
| | | |
| | | |
| | | |
| | | |
| | | |
| | **Total Transfer In** | $ 720,000.00 |

Requested By: Miranda Iwamoto

Approved By: _____ Department Head

Reset Form

# Budget Transfer Request

Date: 04/02/2025

Department: Admin - HR

## Explanation of Request

The Insurance Fund needs a transfer to stay within the City's legal budgetary compliance for the current biennium. There was a legal judgement against the City which resulted in a payment via the payroll process. We need to make a transfer from M&S to Personnel Services.

## Transfer From

| Account Number | Line-Item Name | Amount |
|---|---|---|
| 030022.607120 | Liability Claims | $ 137,398.00 |
| | | |
| | | |
| | | |
| | | |
| | | |
| | **Total Transfer Out** | $ 137,398.00 |

## Transfer To

| Account Number | Line-Item Name | Amount |
|---|---|---|
| 030022.510100 | Regular | $ 70,000.00 |
| 030022.520100 | FICA | $ 5,355.00 |
| 030022.520210 | Employer's Share | $ 49,183.00 |
| 030022.520220 | Employee Share Paid | $ 12,860.00 |
| | | |
| | | |
| | **Total Transfer In** | $ 137,398.00 |

Requested By: Miranda Iwamoto

Approved By: _____ Department Head

Reset Form

# RESOLUTION NO. 2025-06

## A RESOLUTION ADOPTING A BUDGET TRANSFER FOR CHANGES TO THE 2023-25 BIENNIUM BUDGET

## RECITALS:

A. The City of Ashland 2023-25 Biennium Budget was adopted on June 6, 2023 for the period of July 1, 2023 through June 30, 2025.

B. The City of Ashland (City) is authorized by ORS 294.471 to approve a Supplemental Budget or by ORS 294.463 a Budget Transfer for one or more of the following reasons:

1. An occurrence or condition which had not been ascertained at the time of the preparation of a budget for the current year which requires a change in financial planning.
2. A pressing necessity which was not foreseen at the time of the preparation of the budget for the current year which requires prompt action.
3. Funds were made available by another unit of federal, state or local government and the availability of such funds could not have been ascertained at the time of the preparation of the budget for the current year.

C. In accordance with ORS 294.471(3)(b), public notice of the supplemental budget and public hearing was given at least five days prior to the hearing held on April 15, 2025.

**THE CITY OF ASHLAND HEREBY RESOLVES AS FOLLOWS:**

SECTION 1. In accordance with provisions stated above, the Mayor and City Council of the City of Ashland determine that it is necessary to adopt a Budget Transfer, establishing the following amendments:

For the Tourism Fund:

| | Transfers: | |
|---|---|---|
| | Appropriation | Resource |
| Administration - Tourism Personnel Svcs | 25,000 | |
| Administration - Tourism Materials & Svcs | | 25,000 |
| | $ 25,000 | $ 25,000 |

For the CIP Fund:

| | | |
|---|---|---|
| **Increase In resource:** | | |
| Capital Improvements Fund | Transfer in from the General Fund | 720,000 |
| | ***Total Increased Resource*** | **$ 720,000** |
| | | |
| **Increase In appropriation:** | | |
| Capital Improvements Fund | For ongoing construction costs of Pioneer Hall and Community Center | 720,000 |
| | ***Total Increased Appropriation*** | **$ 720,000** |

SECTION 2. This resolution is effective upon adoption.

This resolution was duly PASSED and ADOPTED this 15th day of April, 2025, and takes effect upon signing by the Mayor.

_____
Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this 15th day of April, 2025.

_____
Tonya Graham, Mayor

Reviewed as to form:

_____
Douglas M. McGeary
Acting City Attorney

# RESOLUTION NO. 2025-05

## A RESOLUTION ADOPTING A BUDGET TRANSFER FOR CHANGES TO THE 2023-25 BIENNIUM BUDGET

## RECITALS:

A. The City of Ashland 2023-25 Biennium Budget was adopted on June 6, 2023 for the period of July 1, 2023 through June 30, 2025.

B. The City of Ashland (City) is authorized by ORS 294.471 to approve a Supplemental Budget or by ORS 294.463 a Budget Transfer for one or more of the following reasons:

1. An occurrence or condition which had not been ascertained at the time of the preparation of a budget for the current year which requires a change in financial planning.
2. A pressing necessity which was not foreseen at the time of the preparation of the budget for the current year which requires prompt action.
3. Funds were made available by another unit of federal, state or local government and the availability of such funds could not have been ascertained at the time of the preparation of the budget for the current year.

C. In accordance with ORS 294.471(3)(b), public notice of the supplemental budget and public hearing was given at least five days prior to the hearing held on April 15, 2025.

**THE CITY OF ASHLAND HEREBY RESOLVES AS FOLLOWS:**

SECTION 1. In accordance with provisions stated above, the Mayor and City Council of the City of Ashland determine that it is necessary to adopt a Budget Transfer, establishing the following amendments:

For the Insurance Fund:

| | Transfers: | |
|---|---|---|
| | Appropriation | Resource |
| Insurance - Finance | 70,000 | |
| Insurance - Finance | 5,355 | |
| Insurance - Finance | 49,183 | |
| Insurance - Finance | 12,860 | |
| Insurance - Finance | | 137,398 |
| | $ 137,398 | $ 137,398 |

SECTION 2. This resolution is effective upon adoption.

This resolution was duly PASSED and ADOPTED this 15th day of April, 2025, and takes effect upon signing by the Mayor.

_____
Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this 15th day of April, 2025.

_____
Tonya Graham, Mayor

Reviewed as to form:

_____
Douglas M. McGeary
Acting City Attorney

# Council Business Meeting

**Date**: April 15, 2025

| | |
|---|---|
| **Agenda Item** | Public Hearing on 2025–2026 Community Development Block Grant (CDBG) Award and Action Plan |
| **From** | Linda Reid, Housing Program Manager |
| **Contact** | linda.reid@ashland.or.us |

## SUMMARY

The City of Ashland is expecting a total of **$162,636** in Community Development Block Grants (CDBG) for the 2025 Program Year. The City of Ashland may not receive final notification of the annual CDBG award amount from the Department of Housing and Urban Development until after awards have been made. The estimate is included to provide guidance to applicants regarding the expected amount of available funds. The City will reserve the right to award more or less than this estimate depending on the final entitlement amount authorized by Congress and the Department of Housing and Urban Development.

Under CDBG regulatory limits only 15% of the anticipated 2025 allocation is available for social services and thus such awards are limited to approximately **$24,395**. The City also utilizes 20% of the annual allocation for administrative costs. The 2025 amount of funding available for award to capital improvement projects is approximately **$105,714,** which the City has opted to hold back to address facility improvements at the 2200 Ashland Street Severe Weather Shelter building; in addition, unexpended funds from prior CDBG program years are also being dedicated to support these improvements.

## POLICIES, PLANS & GOALS SUPPORTED

2020-2024 Consolidated Plan 5-year strategic plan for the use of community development block grant (CDBG) funds

- https://www.ashland.or.us/Files/Con_Plan_Final_Adopted_Version.pdf

## BACKGROUND AND ADDITIONAL INFORMATION

The City of Ashland has received two applications for the public service CDBG funding offered.

| Organization | Proposed Project | CDBG Funds Requested | Goal | Consolidated Plan Goal |
|---|---|---|---|---|
| Maslow Project | Encourage stability, self-sufficiency, and school achievement for homeless youth. ***Public Service** | $18,000 | Homeless Goals: Provide access to basic needs, information, and referral. Provide case management and housing to improve stability to approximately **100** identified homeless youth ages 0-24. | Public service activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted<br><br>Public service activities for Low/Moderate Income Housing Benefit: 50 Households Assisted |
| OHRA | Expansion of the laundry shower program to provide an additional day of service, on the North side of town. ***Public Service** | $24,395 | Homeless Goals: Outreach through Expansion of the laundry shower program approximately **28** more showers and **14** more loads of laundry | Public service activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted |

**Funding Requested/Available**

A total of **$24,395** in regular CDBG funding is available to distribute to eligible recipients for projects meeting the CDBG national objectives, and which are consistent with the City of Ashland 5-year Consolidated Plan.

CDBG funds will be available upon approval of the 2025 Action Plan, and upon the completion of any regulatory requirements. Upon completion of the Action Plan a public hearing for review and approval will be held before the Housing and Human Services Advisory Committee to ensure consistency with the awards designated by the City Council. The U.S. Department of Housing and Urban Development (HUD) must review the Annual Action Plan submitted by the City to ensure the activities funded are consistent with federal requirements, and with the local Consolidated Plan.

The City will reserve the right to award more or less than this estimate, dependent on the final entitlement amount authorized by Congress and the Department of Housing and Urban Development (HUD). As the Federal Administration is currently evaluating funding levels for federal agencies and has been eliminating or reducing certain grant programs, the City has prepared the CDBG application in alignment with previous years, anticipating a continuation of the program. However, if the Administration reduces or eliminates CDBG funding, it is important to note that the City's awards are conditional upon the actual allocation of funds by HUD.

The Housing and Human Services Advisory Committee reviewed the applications and made a fund recommendation at their regular meeting on March 27th. The Housing and Human Services Advisory Commission Recommendation is as follows:

- *Motion to fully fund Maslow Project at the requested amount of $18,000 with the remaining balance [$6395] to be awarded to OHRA to support the expansion of the Laundry Shower program to the North end of town.*

**FISCAL IMPACTS**

The funding awarded to Community Development Block Grant (CDBG) projects is sourced from allocations provided by the federal government, specifically the Department of Housing and Urban Development (HUD) and is incorporated into the biennium budget. As the City undertakes the administration of the program, the awards are reimbursed by the Department of Housing and Urban Development. Consequently, this arrangement ensures there is no fiscal impact on the City, as all expenditures related to CDBG projects are fully covered through federal reimbursements.

**SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS**

I move to award the competitively available 2025 Community Development Block Grant funds as follows:
$ (18,000) to the Maslow Project Public Service Project; and
$ (6,395) to the OHRA Laundry Shower Program Expansion

Should the Council decide not to award all or part of the funding, the remainder would be incorporated into the next budget allocation process. However, opting not to award the funding at this time could result in the City being found to be untimely in its expenditure of funds, and risks having the funding recaptured by the Department of Housing and Urban Development.

**REFERENCES & ATTACHMENTS**

1. 03272025- Staff CDBG application Evaluation
2. 2025 Maslow Project - Ashland CDBG Application
3. 2025 OHRA-Ashland CDBG Application

4. 2025-3-27-HHSAC-Draft Minutes

DATE: March 27, 2025
TO: Housing and Human Services Advisory Committee
FROM: Linda Reid, Housing Program Manager
DEPT: Planning
RE: CDBG Application Staff Evaluation

The City of Ashland is expecting a total of **$162,636** in Community Development Block Grants (CDBG) for the 2025 Program Year. The City of Ashland may not receive final notification of the annual CDBG award amount from the Department of Housing and Urban Development until after awards have been made. The estimate is included to provide guidance to applicants regarding the expected amount of available funds. The City will reserve the right to award more or less than this estimate depending on the final entitlement amount authorized by Congress and the Department of Housing and Urban Development.

Under CDBG regulatory limits only 15% of the anticipated 2025 allocation is available for social services and thus such awards are limited to approximately **$24,395**. The City also utilizes 20% of the annual allocation for administrative costs. The amount of funding available for award to capital improvement projects is approximately **$105,714,** which the City has opted to hold back to address facility improvements at the 2200 Ashland Street Shelter building.

The City of Ashland Housing and Human Services Advisory Committee will review the grant requests and make a recommendation for grant awards to the City Council. Subsequently, the City Council will hold a public hearing and make a final decision on the grant awards at their regular meeting held on April, 15, 2025. The City of Ashland has received two applications for the available public service funding.

Staff's eligibility assessment of each of the proposals received, and recommendations regarding the allocation of the 2025 CDBG funds are provided on the following pages.

**Proposals Received**

| Organization | Proposed Project | CDBG Funds Requested | Goal | Consolidated Plan Goal |
|---|---|---|---|---|
| Maslow Project | Encourage stability, self-sufficiency, and school achievement for homeless youth. ***Public Service** | $18,000 | Homeless Goals: Provide access to basic needs, information, and referral. Provide case management and housing to improve stability to approximately **50-100** identified homeless families | Public service activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted<br><br>Public service activities for Low/Moderate Income Housing Benefit: 50 Households Assisted |
| OHRA | Expansion of the laundry shower program to provide an additional day of service, on the North side of town. ***Public Service** | $24,395 | Homeless Goals: Outreach through Expansion of the laundry shower program approximately **28** more showers and **14** more loads of laundry | Public service activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted |

## Funding Requested/Available

A total of **$24,395** in regular CDBG funding is available to distribute to eligible recipients for projects meeting the CDBG national objectives, and which are consistent with the City of Ashland 5-year Consolidated Plan.

CDBG funds will be available upon approval of the 2025Action Plan, and upon the completion of any regulatory requirements including but not limited to environmental review clearance. Upon completion of the Action Plan a public hearing for review and approval will be held before the Housing and Human Services Advisory Committee to ensure consistency with the awards designated by the City Council. The U.S. Department of Housing and Urban Development (HUD) must review the Annual Action

Plan submitted by the City to ensure the activities funded are consistent with federal requirements, and with the local Consolidated Plan. The City will reserve the right to award more or less than this estimate dependent on the final entitlement amount authorized by Congress and the Department of Housing and Urban Development.

## Assessment Criteria

Staff has assessed the proposals to determine whether they meet the Federal CDBG regulations and address the priorities identified within the City of Ashland 5-year Consolidated Plan.

Three areas are evaluated for each proposal regarding compliance with federal regulations.

- Projects must meet the National Objective of the Community Development Block Grant Program.
- All CDBG funded projects must be an "eligible" use under the Community Development Block Grant Program.
- If a project meets all federal requirements and is selected for award, then federal regulations must be met throughout the course of the project.

Some examples of federal regulations which pertain to Community Development Block Grant funded projects are; the beneficiaries from the application of CDBG funds must qualify as eligible populations under the Federal requirements for the CDBG program. Areas of concern are described for each proposal received. The Housing and Human Services Advisory Committee and the City Council can only award CDBG funds to projects that can meet all federal requirements and meet an objective as outlined in the City's 5-year Consolidated Plan.

Priorities within the City of Ashland's 5-year Consolidated Plan are given a priority ranking of High, Medium, or Low. The rankings are intended to assist in directing CDBG funds to the greatest needs. In cases where there are competing projects for limited funds, the projects(s) that are ranked the highest will be funded.

## Public Service Proposal Evaluation

**Maslow Project-School Based Services for Ashland Homeless Youth**

Staff has reviewed the Maslow Project, School Based Services for Ashland Homeless Youth Proposal to determine whether it meets the Federal CDBG regulations, and if the proposal addresses the priorities within the City of Ashland 2020-2024 Consolidated Plan. Maslow Project requested $18,000 in Public Service Grant funds to continue to support a case manager in the elementary, middle, and high schools, providing outreach to high-risk homeless youth and providing them with immediate needs, case management to keep youth engaged in school and promote stability and self-sufficiency for the homeless youth and their families, and to provide temporary housing to homeless youth and families engaged in services.

- This project proposal qualifies under the Low-Moderate Income (LMI) benefit national objective; homeless populations are a presumed benefit population under the CDBG program.
- Services to homeless and at-risk populations are an eligible use of CDBG funds.
- Maslow's proposal expects to provide services and housing to 100 identified homeless school children currently enrolled in the Ashland School District.
- Maslow Project has proven capacity to administer CDBG grant funds-this would be Maslow's ninth year of undertaking this activity in Ashland.
- Staff find that Maslow Project's proposal is consistent with goals identified in the City of Ashland's 5-year Consolidated Plan.

Staff see that Maslow Project's proposal is an eligible use of CDBG funds and is consistent with the City of Ashland Strategies as outlined in the 5-year Consolidated Plan. This activity assists in the prevention of homelessness for low-income households. Maslow has successfully administered this program within the Ashland School District for several years. Furthermore, this project meets and exceeds the 10% leverage requirement of the City of Ashland's CDBG program and leveraging funding from other sources.

**OHRA-Shower Trailer Outreach to Unhoused Ashland Residents**

Staff have reviewed OHRA's, Shower Trailer Outreach to Unhoused Ashland Residents Proposal to determine whether it meets the Federal CDBG regulations, and if the proposal addresses the priorities within the City of Ashland 2020-2024

Consolidated Plan. OHRA requested $24,395 in Public Service Grant funds to expand the laundry showers services to add an additional day, and to provide an additional location or transportation to meet the needs of the North side of Ashland.

- This project proposal qualifies under the Low-Moderate Income (LMI) benefit national objective; homeless populations are a presumed benefit population under the CDBG program.
- Services to homeless and at-risk populations are an eligible use of CDBG funds.
- OHRA's service expansion will provide showers and laundry services to 30 additional unhoused individuals.
- OHRA has proven capacity to administer CDBG grant funds
- Staff find that OHRA's proposal is consistent with goals identified in the City of Ashland's 5-year Consolidated Plan.

Staff see that OHRA's proposal is an eligible use of CDBG funds and is consistent with the City of Ashland Strategies as outlined in the 5-year Consolidated Plan. This activity assists in the outreach and services to alleviate the issues of homelessness. OHRA has successfully administered this program within the City of Ashland. Furthermore, this project meets and exceeds the 10% leverage requirement of the City of Ashland's CDBG program and leveraging funding from other sources.

## STAFF RECOMMENDATIONS

Staff's recommendations are based on evaluation of CDBG eligibility, the City's five-year Consolidated Plan Goals, agency experience and capacity, and readiness to proceed.

**Public Service Projects:** The City received two public service project proposals as that is the only type of funding the City offered this grant cycle. Both Maslow Project and OHRA have successful track records of providing the services described in their respective proposals. Maslow Project's proposed activity would continue to provide needed services to alleviate and prevent homelessness. Maslow Project staff have proven experience and capacity to administer CDBG grant funds and have exceeded the matching requirements of the grant. Similarly, OHRA's proposed activity would expand a needed and valuable service in the community and provide expanded outreach services

which is an identified need in the community. Staff understand that both project proposals utilize proven and effective strategies for addressing and preventing homelessness and both organizations provide needed and valuable services to the community. Staff is supportive of fully funding both activities, but given the limited funding for public service activities, that is not possible. Staff would recommend providing a larger share of the limited funding to Maslow, as without this funding services may need to be reduced, whereas OHRA's proposal for an expansion of services, which, while greatly needed, the existing service will still be available without the additional funding.

# CITY OF ASHLAND

**2025 Program Year Community Development Block Grant (CDBG)**
**Public Service Application**

**These completed Sheets shall be included as the first pages on all submittals.**

## I. APPLICANT INFORMATION

**Applicant Organization Name:**

**Maslow Project**

---

**Executive Director's Name(s): Mary Ferrell**

**Board Member Names (attach separate sheet) Attached.**

*Applicant Mailing Address:*

**PO BOX 999 Medford, OR 97501**

*Applicant Street Address:*

**500 Monroe Street, Medford, OR 97501**

IRS Classification: **501c3**

Federal Tax ID#: **27-0734969**

Mission Statement: (may be attached)

Maslow Project's mission is to empower homeless youth and families to engage and thrive independently in all aspects of life by providing supports that stabilize, strengthen resiliency, and foster hope.

Total Employees: **23** Total Volunteers: **50**

**II. CONTACT PERSON** (designate a contact person who is familiar with the project)

Name: Mary Ferrell

Title: Executive Director

Phone Number: 541-608-6868

Fax Number: 541-608-6869

E-mail Address: mary@maslowproject.com

**III. PROJECT INFORMATION SUMMARY**

Project Name or Title:

Maslow Project Case Management & Wrap-Around Support for Homeless Youth & Families

Expected Completion Date: June 30, 2026

| | |
|---|---|
| Requested CDBG Funds: | $ 18,000 |
| Organizational Match: | $ 13,073 *included in the “Funds from other sources” |
| Funds from Other Sources: | $ 105,073 |
| Total Project Cost: | $ 123,073 |

**2) Project Summary, Background & Objectives**

Maslow Project provides wrap-around, direct services to homeless youth and their families. 100% of the clients we serve fall within the extremely-low income category. Our services include: Case Management, Advocacy, School-Based Programs, Drop-in Resource Centers, Street Outreach, Permanent Supportive Housing and a Transitional Living Program.

The Ashland CDBG project proposal is for partial coverage of wages/benefits of our Ashland-based Case Manager, who works with homeless youths and their families long-term to substantially improve their living conditions and help them gain self-sufficiency, as measured by regular assessments and an evidence-based self-sufficiency pre- and post-test.

With an office located in Ashland High School and at the Housing Authority of Jackson County Snowberry Brook complex in Ashland, our dedicated Ashland Case Manager is a certified Community Health Worker (CHW) positioned to support homeless clients with barrier removal, self-sufficiency, resilience, mental health, basic needs, education, employment and housing. Case Management goes beyond basic needs to create client-led goal plans for long-term positive outcomes.

Ashland CDBG funds to continue Case Management are essential, as School District funding presently pays for one-fifth of Maslow's cost of services, and Ashland School District is currently experiencing a budget crisis, leaving future funding uncertain.

While HAJC provides units for Maslow clients, funding is not provided for the cost of Case Management which includes assistance with applications, landlord engagement, housing readiness through Ready to Rent courses, financial assistance, eviction prevention (through inspection pre-screening, for example) and coordinated entry — all required elements to help overcome barriers for many unhoused families and to successfully retain that housing.

Case Management is a proven best practice for long-term positive outcomes, not only addressing immediate needs but providing ongoing support to build self-sufficiency & escape the poverty cycle.

For example, homeless students who are case-managed by Maslow consistently have a graduation rate of 87-92% whereas the state average for homeless students is just 60.6% (Oregon Dept of Education 2023-24 Report Card). This is monumental, as a high school degree is the #1 factor preventing adult homelessness.

Maslow Project has been successfully administering CDBG funds from the City of Ashland since 2012, and we rely on CDBG funding to deliver intensive wrap-around services to homeless youths and families in the Ashland community.

Maslow Project maximizes our partnerships with more than 40 community partners – including HAJC, Ashland School District, ACCESS, DHS, Jackson County Mental Health Services and others -- to administer resources appropriately and avoid any duplication of services. We also participate in local task forces to address systemic inequities and improve services. We work hard to fundraise for individual donations, and we encourage community organizations to hold essential items drives to fulfill needs for basic needs items (such as one recently completed by Rotary Club of Ashland Lithia Springs).

**Background:**

Founded by Executive Director Mary Ferrell in 2000, Maslow Project became a 501c3 in 2009. Maslow Project has more than two decades of experience providing services for homeless youths and families using evidence-based programs with proven, life-changing results.

Strategies include positive youth development, harm reduction and strength-based approaches that foster resiliency. These practices are woven throughout (low barrier, safe spaces, client rights & responsibilities, rapport-building & gold-standard client-care) and contribute to successful client outcomes.

Management has 50 combined years of experience working with our client population. Direct-service staff hold bachelor's degrees in relevant fields & case managers are Qualified Mental Health Associates, receiving extensive ongoing professional development.

Maslow Project has been successfully administering CDBG funds from the City of Ashland since 2012, City of Medford since 2008 and City of Grants Pass since 2016. We respond quickly to staff requests, are timely and accurate with application/report submissions, actively engage in the City's long-term planning process, provide feedback and data as requested, and are responsive to feedback. Program audits and outcomes have always been successful.

In 2023-24, Maslow Project served more than 3,166 youths and their families. We supported 120 households into housing and case-managed 56 households in our Permanent Supportive Housing Program with HAJC.

Currently, we case-manage 15 HAJC dedicated units at Snowberry Brook in Ashland, 34 units in Medford and 24 units at other sites throughout the Rogue Valley.

Our HAJC partnership helps our clients jump past a 4-year Section 8 HUD wait list. Our case management services help those tenants remain housed, help ensure care is taken of those units, and develop lifelong skills that promote and support self-sufficiency for the residents we serve.

We provide a holistic approach to ending youth and family homelessness as a direct service provider and also as a service hub, connecting our clients to appropriate community services in a coordinated effort (medical/dental/mental health, domestic violence, treatment/recovery programs, shelter, education, etc.).

We coordinate with 40+ local agencies to form a safety-net of care for our clients, coordinating resources and services for optimum outcomes and to avoid duplication of services.

Executive Director Mary Ferrell sits on the Board of the Continuum of Care, which addresses the goals and priorities set forth by HUD, aligning with the City of Ashland's and CoC's priorities.

**Project Objectives:** Provide case management and wrap-around support to homeless youths and families in the city of Ashland.

Maslow Project's Case Management and Wrap-Around Support for Homeless Youth & Families addresses the highest priority within City of Ashland's Consolidated Plan: "support services for homelessness outreach, prevention, and transition." As part of these services, we will provide rent/security deposit assistance to prevent or alleviate homelessness and provide outreach/direct services to homeless populations.

- **Objective 1**: Number of households served: 50 individuals (youth and/or parents) will receive skilled case management & individualized supports

- **Objective 2:** Improved Personal Safety-Net: 100% of individuals contacted will have increased access to basic needs, linkages to community-based services, and a safety plan. Target: 100 individuals (youth and/or their families)

- **Objective 3**: Improved social-emotional supports: 80% of the high school-aged youth in case management will develop two or more positive connections

- **Objective 4**: Improved Self-Sufficiency: 70% of the 50 clients in case management will make measurable growth on their overall self-sufficiency score

- **Objective 5**: Housing Retention: 90% of the 15 households will remain permanently housed in PSH housing for at least 12 months.

**Total project cost is estimated at $123,073.**

## 3) Services to Be Provided & Eligible Target Population

**Eligible Target Population:**
The population served through Maslow Project's Ashland program consists of youth between the ages of 0-24 (and/or their families) residing in Ashland and meeting the McKinney-Vento definition of homelessness: "any student who lacks a fixed, regular, and adequate nighttime residence." Children may be unaccompanied on their own or experiencing homelessness with their entire family.

Youth participating in this program are identified in several ways: at point of enrollment in school, by school staff throughout the school year, through self-referral, by Maslow Project outreach staff, and through referrals from partnering agencies. 100% of this population are presumed by HUD to be LMI. 100% of the homeless youth and families we serve fall within the "extremely-low income" category, and earn 30% or less of the Area Median Income.

**Services**: Through our Ashland-based Case Manager, all of the services Maslow Project offers will be made available to Ashland homeless youth and families. These services include: Case Management, Advocacy, School-Based Programs, Drop-in Resource Centers, Street Outreach, Permanent Supportive Housing and a Transitional Living Program. Services are described in depth below:

**1) Case Management & Advocacy**: Case Management is provided to the most vulnerable and includes intensive support of individualized goals (education, wellness, employment, housing, etc.). Maslow Case Managers are certified as Community Health Workers (CHWs) and as Qualified Mental Health Associates (QMHAs). Advocates remove barriers and connect homeless clients to essential services.

**2) School-Based Programs**: Case Managers support homeless students by removing barriers to education, fostering inclusion, creating safety plans, connecting them to essential resources, setting individual goal plans, and promoting academic progress toward graduation. We have a contract with Ashland School District to provide McKinney-Vento (MKV) services to homeless students lacking "a fixed, regular and adequate night-time residence."

**3) Drop-In Resource Centers:** Clients can access essentials like food, hygiene products, infant items, school supplies, computers, mail receiving and onsite support from Case Managers & Advocates. Mini Resource Centers are located at our Ashland offices at AHS and Snowberry Brook.

**4) Street Outreach**: Maslow conducts regular street and rural outreach to connect with unsheltered youth and provide immediate crisis intervention. We create safety plans and deliver basic needs items such as clothing, food, hygiene supplies & emergency items.

**5) Permanent Supportive Housing:** Maslow Project collaborates with the Housing Authority of Jackson County (HAJC) to secure safe and stable housing for youth and

families through our Permanent Supportive Housing Program. We assist with housing navigation, applications, rent/deposits and ongoing case management to ensure clients stay housed.

**6) Transitional Living Program (TLP):** TLP provides safe, stable, and supportive housing for youth ages 18-22 who are experiencing homelessness. Our program empowers residents to develop essential life skills, pursue educational and employment goals, and transition to permanent housing.

We work to stabilize youth and families by providing crisis intervention and resources for basic needs. We can then begin working on client-driven goal plans for education, employment, and housing. Case Managers are the anchor to all our services and supports. Our work is client-centered and collaborative, empowering clients to shape their own goal plans.

***NOTE:*** *Our agency has reorganized our Direct Service team so that each Case Manager is cross-trained and qualified to carry out and deliver all of our services – eliminating the "Advocate" role. This has been a needed efficiency effort and ensures our clients get the help they need regardless of where we are supporting them.*

## 4) Work Program and Timeline

The program outlined in this application is ongoing; the Ashland CDBG Funds would cover activities during the time period of July 1, 2025 to June 30, 2026. *Please see attached project schedule (Form A-2) for more details.*

## 5) Financial Information

### Project Expenses:

**Wages & Fringe Benefits:** Payroll is based on compensation for a 1.0 FTE Case Manager ($26hr*40 hr/wk*52wks=$52,000 annual + 26% payroll taxes & employee benefits = $13,520 for total wages & benefits of $65,520 annual costs.

These costs are based on actual payroll reports. Payroll costs are based on agency salary schedules and in alignment with market rates for staff qualifications and experience. **100% of CDBG funds will support approx. 25% of the 1.0 FTE dedicated to this project.**

**Materials/Supplies:** 100% client supports - barrier removal, safety-net needs, emergency hotels stays, deposit/rent assistance funds: $40,000. *Covered by non-CDBG funds.*

**Marketing:** Materials and supplies to promote our programs and services, attract & find eligible clients, and costs associated with outreach events. $1,500 – *covered by non-CDBG sources.*

**Indirect/admin**: rate of 15% of program admin costs estimated at $16,053 - *covered entirely by other non-CDBG sources.* Program Administration Includes overhead and general staffing necessary to administer the program (accounting, management, grant administration). *15% is the federally approved deminimus rate allowed.*

**Matching Funds:** Approx 10% of total project budget will come from unrestricted private donations/gifts to be raised over the next program year.

**Total cost of this project is $123,073.**

The $18,000 amount requested from the Ashland Community Development Block Grant represents 15% of our Ashland program budget and is an essential part of our program support. All other program costs are being leveraged with other funds, including administration and overhead. *Please refer to attached Forms B-2 and C for more information.*

**6) Eligibility for Federal Funding**

**GENERAL INFORMATION**

**7) Maslow Project's Mission and Service History**

**Mission:**
Maslow Project's mission is to empower homeless youth and families to engage and thrive independently in all aspects of life by providing supports that stabilize, strengthen resiliency, and foster hope.

We do this by removing barriers to education and employment, fostering self-sufficiency in a collaborative and inclusive environment, and providing resources and basic needs.

Our services include: case management and advocacy, school-based programs, street outreach, family and youth advocacy, case management, permanent supportive housing, a transitional living program, basic needs and safety-net services.

**Service History:**
Maslow Project is a 501(c)(3) with more than two decades of experience providing evidence-based programs for homeless youth and families, grounded in best practices and producing life changing, long-term results.

Executive Director Mary Ferrell founded Maslow Project in 2000 and oversees all programs at the highest level. She represents our clients' needs on numerous local initiatives and participates in federal efforts that inform and address trends and best-practices for homeless youth-serving agencies across the nation.

In 2008, Maslow Project was recognized by the National Association for the Education of Homeless Children and Youth as the "Outstanding School-Based Educational Program Providing Services to Students in Homeless Situations."

Our work has always been trauma-informed, inclusive, and focused on equity. Maslow's program model is intentionally youth-centered. Other best practices we utilize include Trauma-Informed Care, Harm Reduction and Positive Youth Development - strength-based approaches that foster resiliency.

Maslow has established strong partnerships with local school districts—including Medford, Phoenix-Talent, Ashland, and Grants Pass—to provide McKinney-Vento services supporting homeless youths.

Maslow Project has consistently worked to address the complex issues surrounding youth homelessness, offering individualized, client-centered services that meet youth and families where they are.

Over the years, Maslow has expanded its services to also include Permanent Supportive Housing and a Transitional Living Program, completing the cycle from homelessness to housed for many youth and families in Southern Oregon and stopping the cycle from repeating.

Throughout its history, Maslow Project has maintained a focus on empowering homeless youth to thrive independently through supports that stabilize and engage them in all aspects of life. Maslow Project is a regional leader in trauma-informed services for homeless youth and families in Southern Oregon.

**8) Self-Sufficiency**

Maslow Project's Case Management & Wrap-Around Support project promotes self-sufficiency for homeless youth and families in several key ways:

1. **Youth-Led Goal Planning:** Case managers work collaboratively with youth to develop personalized goal plans, starting with immediate needs and breaking larger goals into manageable steps. This process empowers youth to take ownership of their progress and builds confidence in their ability to overcome challenges.

2. **Skill-Building:** Case managers offer choices and teach problem-solving skills, allowing youth to make decisions and learn from experiences. This approach fosters independence and self-reliance. They offer extensive life skills training, including financial literacy, budgeting, job readiness, and health education. These practical skills are essential for independent living.

3. **Strengths-Based Approach:** By having youth identify their own strengths in assessments, case managers help increase self-confidence and promote a

sense of capability in navigating life's challenges.

4. **Comprehensive Support:** Maslow Project provides wrap-around services addressing various aspects of life, including education, employment, housing, and health. This holistic approach ensures youth have the necessary resources and support to work towards self-sufficiency.

5. **Linkages to Community Resources:** Case managers work closely with schools, shelters, and other service agencies to connect youth with opportunities and resources, helping them build a network of support beyond Maslow Project.

6. **Transition Planning:** Case managers help youth develop plans for independent living, focusing on long-term housing goals and self-sufficiency.

7. **Qualified Staff:** Maslow's case managers are Qualified Mental Health Associates (QMHA) certified, enabling them to provide a higher level of care and address complex mental health needs that may hinder progress towards self-sufficiency.

8. **Self-Sufficiency Scale:** Maslow Project tracks progress through the evidence-based Self-Sufficiency Scale, allowing youth to see their growth and achievements, further motivating them towards independence.

By combining these elements, Maslow Project's Case Management effectively supports homeless youth and families in developing the skills, resources, and confidence needed to achieve and maintain self-sufficiency.

## 9) Benefits to Extremely Low-Income Individuals

**Target Population to Be Served:**
Homeless youths 0-24 and their families living in the City of Ashland; 100% of homeless youth and families we serve fall within the “extremely low income” category, at 30% or less of the Area Median Income.

In order to participate in Maslow Project’s program, youths must be identified as homeless under the McKinney-Vento definition of homelessness. Homeless people are presumed by HUD to be principally persons of low and moderate incomes. Enrolled extremely-low or low-income homeless youth qualifying for services always have priority in our program, and will be able to access services regardless of the number of qualifying moderate-income individuals.

**Total Number in Target Population to be Served Annually (100% extremely low-income):**
Maslow Project’s Ashland program will serve between **100-145 unduplicated individuals** during the 2025-2026 year – approximately 50 of whom will participate in

intensive Case Management (1.0 FTE) and 15 households in Permanent Supportive Housing services. All clients are 100% extremely low-income.

**How Case Management & Wrap-Around Support Benefits the Target Population:**

Maslow Project Case Management and Wrap-Around Support significantly benefit homeless youths and families.

Case Management provides comprehensive, individualized support tailored to each client's unique needs. Case managers work collaboratively with youth and families to develop personalized goal plans, addressing immediate needs like food and shelter while also focusing on long-term objectives such as education, employment, and housing stability. This holistic approach ensures that clients receive the specific resources and guidance they need to overcome their challenges and work towards higher level goals and self-sufficiency.

Wrap-Around Supports helps stabilize youth and families by meeting their immediate needs (from food and hygiene to safety and housing), which then allows them to focus on higher-level goals like education, employment, and self-sufficiency. This approach empowers clients by building their skills, confidence, and resilience.

For example, Maslow Project's case managers work collaboratively with youth to develop personalized goal plans, teaching problem-solving skills and fostering independence. This comprehensive support system creates a foundation for homeless youth and families to overcome barriers, build a network of resources, and work towards long-term stability and success.

**10) Project Feasibility**

Maslow Project has more than 20 years of experience providing comprehensive services to homeless youth and families in Southern Oregon and is recognized as a leader in the region for our proven, effective case management and wrap-around supports. The following aspects demonstrate our capacity and experience:

1. **Qualified Staff:** All Case Managers are certified Community Health Workers (CHWs) and the majority are Qualified Mental Health Associates (QMHAs) who receive extensive ongoing training and clinical supervision.
2. **Extensive Partnerships:** Maslow collaborates with over 40 trusted community partners, including schools, healthcare providers, and housing agencies.
3. **Multiple Access Points:** Services are offered through drop-in centers, street outreach, and school-based programs, ensuring accessibility for clients.
4. **Evidence-Based Practices:** Maslow utilizes trauma-informed care, positive youth development, and harm reduction strategies in service delivery.

5. **Proven outcomes:** Maslow case-managed clients have high success rates in areas such as academic progress, high school graduation, social-emotional wellbeing and self-sufficiency. In FY 23-24, 75% of clients increased self-sufficiency. 86% of school-based clients graduated high school. 95% of clients retained housing in our Permanent Supportive Housing program.

## 11) Attachments

Please see attached Letter of Support from Housing Authority of Jackson County, Maslow Project's Board of Directors List, and our 2023-2024 Annual Report with statistics for the year.

## 12) CDBG Application Checklist

Attached.

**CITY OF ASHLAND**
**2025 Program Year**
**CDBG PUBLIC SERVICE APPLICATION CHECKLIST**

In order to determine compliance with all applicable HUD regulations and to help to ensure that projects will be eligible for CDBG funding, the City of Ashland will need to address all HUD requirements. The purpose of this checklist is to point out areas where potential problems could arise. Obviously, this is a comprehensive list, which must evaluate a wide array of different kinds of proposals. Therefore, not every item will be applicable to every project. **Please fill it out entirely indicating all items which are not applicable and include it as part of your proposal application.**

| **A. Applicant's Background** | **Yes** | **No** | **N/A** |
|---|---|---|---|
| 1. Is the applicant a legal non-profit organization or unit of government? | X | | |
| 2. Do the proposed clients or users of the project meet HUD Income Guidelines (see page 10 for guidelines)? | X | | |
| 3. Does applicant have the capability to maintain written income documentation? | | | X |
| 4. Is the applicant primarily a religious organization? | | X | |
| 5. Has the applicant administered a CDBG project previously? | X | | |
| 6. Is your agency willing and able to provide all required reports and accountability to the City as required by HUD? | X | | |

**Form A-2**
**To be completed for Social Service Proposals**

**Social Services Proposals**

| Activity | Start Date | Completion Date |
|---|---|---|
| **Case Management & Wrap-Around Supports:** Case Manager will provide basic needs/resources/referrals and work with homeless youth and families on client-driven goal plans related to employment, health, education, and housing to improve self-sufficiency.<br><br>• 100 individuals will be contacted and have increased access to basic needs, linkages to community-based services, and a safety plan.<br>• 50 individuals (youth and/or parents) will receive skilled case management & individualized supports<br>• 15 households will receive PSH case management services | 7/1/25 | 6/30/26 |
| **Collect Outcome Data:** Individuals & families are assessed at start of case management with an intake appointment and with regular check-ins and assessments, including Self-Sufficiency Scale. We have extensive intake, tracking, and documentation procedures in place. ClientTrack is our database for documenting assessments, demographics and tracking client progress.<br><br>• 80% of the high school-aged youths in case management will develop two or more positive connections.<br>• 70% of the 50 clients in case management will make measurable growth on their overall self-sufficiency scores.<br>• 90% of the 15 households will remain permanently housed in PSH housing for at least 12 months. | 7/1/25 | 6/30/26 |

**Social service providers should list key benchmarks in the table above for their proposed projects (IE hire of personnel, application for further funding, initiation of direct client services, etc)**

# Form B-2
# To be completed for Social Service Proposals

**Social Service Proposals**

| | Total Cost | CDBG Request | Other Source(s) |
|---|---|---|---|
| **Direct Client Services** | | | |
| Wages (of personal providing direct client services + fringe benefits) 1 FTE Case Manager | 65,520 | 18,000 | 47,520 |
| Materials/Supplies (rents/barrier removal) | 40,000 | 0 | 40,000 |
| Marketing/Outreach | 1,500 | 0 | 1,500 |
| Program Administration Includes overhead and general staffing necessary to administer the program (accounting, management, grant administration) but that does not provide direct benefits to the client. @15% de minimus rate | 16,053 | CDBG Funds are not available for program administration | 16,053 |
| **Total Project Cost** | 123,073 | 18,000 | 105,073 |

**Form C**
**SOURCE(S) OF FUNDS FOR OPERATING EXPENSES WORKSHEET**
Completeness of this worksheet establishes the capacity of the organization to sustain the operations of the program(s).

| Sources | Secured | Conditional (awarded with conditions) | Tentative | Commitment Date |
|---|---|---|---|---|
| **Federal Grants** | **$15,000 TLP** | **$0** | **$15,000 SOP** | **TLP 10/2/24<br>SOP 10/1/25** |
| **State Grants** | **$0** | **$0** | **$17,000 YHEP** | **YHEP 7/1/25** |
| **Local Grants** | **$30,000 ACCESS** | **$0** | **$18,000<br>Ash. CDBG<br>$10,000<br>Ash SD** | **ACCESS 7/1/24<br>ASD 7/1/25** |
| **Non-Governmental Grants** | **$0** | **$0** | **$5,000 Butler** | **Butler 7/1/25** |
| **Donations/Gifts** | **$0** | **$0** | **$13,073** | **FY 2025-26** |
| **Applicant Contribution** | **$0** | **$0** | **$0** | **N/A** |
| **Program Income** | **$0** | **$0** | **$0** | **N/A** |
| **Loans** | **$0** | **$0** | **$0** | **N/A** |
| **Other (specify)** | **$0** | **$0** | **$0** | **N/A** |
| **Other (specify)** | **$0** | **$0** | **$0** | **N/A** |
| **TOTAL** | **$45,000** | **$0** | **$78,073** | **$123,073** |

Please provide a description the timeline of loan and grant application dates as related to the proposed project. Specifically, for any tentative funding sources please provide application dates, award dates and funding availability dates. **Funds listed above include:** Ashland School District, pending Budget adoption for school year 25-26 but is anticipated. Butler funds are awarded on a rolling annual basis and are also anticipated. YHEP is a 2-year biennium fund from

the State and application submitted late Spring 2025. SOP is a federal application that will be submitted early summer 2025 with an award date of 10/1/2025. It's worth noting the status of federal sources has been cause for concern amongst nonprofits and our agency is always trying to increase our non-federal revenues where possible including a robust a growing individual giving efforts and we are exploring behavioral health funding streams as a source of potential billable revenue down the line.

| **Revenue** | **Status** | **Amount** |
|---|---|---|
| Federal Grants | | 30,000 |
| TLP – 15,000 | Secured 10/1/25 | |
| SOP – 15,000 | Planned 10/1/25 | |
| State Grants | | 17,000 |
| YHEP – 17,000 | Planned 7/1/25 | |
| Local Grants | | 58,000 |
| Ash CDBG 18,000 | Submitted | |
| ACCESS 30,000 | Secured 7/1/24 | |
| Ashland SD 10,000 | Planned 7/1/25 | |
| Non-Governmental Grants | Secured (Butler on-going funding) | 5,000 |
| Butler – 5,000 | | |
| Donations/Gifts – Match 10% | Planned (FY 25-26 on-going) | 13,073 |
| **Total Revenue** | | **123,073** |
| **Expenses** | | |
| Wages (1FTE@$26x40hrsx52wks) | | 52,000 |
| Staff Benefits (@26% of wages) | | 13,520 |
| Materials/Supplies (barrier removal, basic needs, rent assistance, deposits) | | 40,000 |
| Marketing (outreach materials) | | 1,500 |
| Admin (indirect-@15% of direct charges) | | 16,053 |
| **Total Expenses** | | **123,073** |
| | | |

**Form D**
**DISCLOSURE OF INTERESTS**

To assist the City of Ashland in determining whether there may be a potential conflict of interest related to the expenditure of Community Development Block Grant funds we request the following information be provided by applicants:

ORGANIZATION NAME: **Maslow Project**

Organization is:
1. Corporation ( )
2. Non-Profit 501C3 (x)
3. Partnership ( )
4. Sole Owner ( )
5. Association ( )
6. Other ( ) _____

**DISCLOSURE QUESTIONS**

If additional space is necessary, please attach a separate sheet.

1. State the names of each "employee" of the City of Ashland having a financial or personal interest in the above-mentioned "organization" or project proposed.
Name, Job Title, and City Department
__N/A_____

2. State the name(s) of any current or prior elected or appointed "official" of the City of Ashland having a potential "financial interest" in the organization or project.
Name/Title
__N/A_____ _____

3. Provide the names of each "board member" of the Organization seeking CDBG funding

Name Board, Commission, or Committee (may be attached as a separate Sheet)

1 Lisa Morris, Board Chair – Executive/Development Committee
2 Scott Clauson, Vice Chair - Executive/Finance Committees
3 Amy Zarosinski, Treasurer – Executive/Finance Committee
4 Sharilyn Cano, Secretary – Executive/Development Committees
5 Jamie Hazlett, Esq, Member – Finance Committees
6 Sara DeVries, Member - Program Committee
7 Ray Hetzer, Member - Program Committee

If the applicant has provided names in question 1 or 2, please provide details regarding any known potential conflicts of interest in an attached narrative.

**If the applicant has provided names in question 1 or 2, please provide details regarding any known potential conflicts of interest in an attached narrative. N/A**

# HOUSING AUTHORITY OF JACKSON COUNTY

2251 TABLE ROCK ROAD MEDFORD OR 97501

**PH/TDD (541) 779-5785** **FAX (541) 857-1118**


January 15, 2025

The Housing Authority of Jackson County is pleased to support this application from Maslow Project in support of their work with homeless youth in Ashland, Oregon. Maslow helps this population overcome the numerous barriers to become stabilized through their outreach, case management, and housing programs. The work Maslow Project does meet a critical and growing need in our community to help youth address barriers, navigate the steps and process for finding and securing housing, building life skills, and supporting these young people toward self-sufficiency and positive log-term outcomes. Maslow is one of the few organizations offering housing supports to this growing and priority population in our region.

The case management and navigation services Maslow Project offers to individuals both prior and post housing, help ensure skills are developed to promote better outcomes for both tenants and landlords. The Housing Authority of Jackson County currently partners through an MOU with Maslow Project on approx. 80 units in Jackson and Josephine County, with 15 in Ashland and we look forward to continuing to support their work.

We encourage the City of Ashland to support Maslow Project's application for Community Development Block Grant funds to support their Wrap-Around Case management program.

Sincerely,
*Cara Carter*


**Cara Carter**
Director of Housing Programs
Ext. 1002
cara@hajc.net

# MASLOW PROJECT
## Board of Directors List

**Lisa Morris, Board Chair**
**Family Nurse Practitioner**
390 Oaks Chapel Rd
Goodwater, AL 35072
(541) 778-3509
lisasmorris1@gmail.com
*Joined in 2017*

**Scott Clauson, Vice Chair**
**Retired Chief of Police, City of Medford**
PO BOX 1212
Medford, OR 97501
541-774-2200
sclauson2011@gmail.com
*Joined in 2020*

**Amy Zarosinski, Treasurer**
**Chief Financial Officer, S+B James Construction**
345 Mary Bee Ln
Medford, OR 97504-6181
(541)773-6633
zarosinski@charter.net
*Joined in 2014*

**Sharilyn Cano, Secretary**
**Human Resources (retired)**
2080 Martin Dr.
Medford, OR 97501
(541) 951-0530 cell
Scano0728@gmail.com
*Joined in 2010*

**Jamie L. Hazlett, Esq., Member**
**Attorney at Law**
25 Newtown Street
Medford, OR 97501
(541)773-3619 (work)
(541)326-1097 (cell)
jamiehazlettesq@gmail.com
*Joined in 2011*

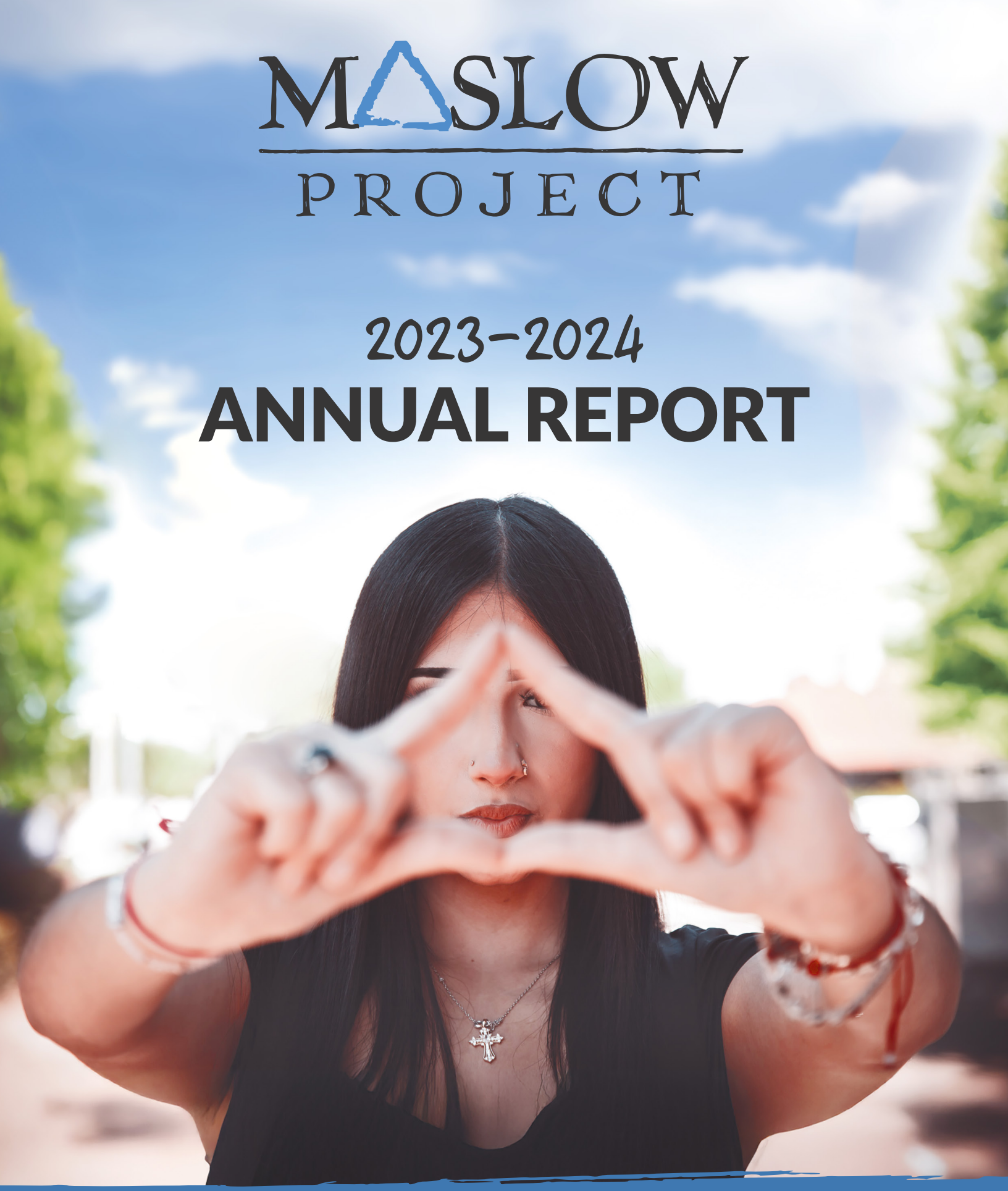
**Sara DeVries, Member**
**Real Estate Broker**
871 Medford Center
Medford, OR 97504
541-890-7458
Sara.devries1@gmail.com
*Joined in 2024*

**Ray Hetzer, Member**
**HR Business Partner**
1030 Highbury Drive
Medford, OR 97501
(541)226-7004
rayhetzer@icloud.com
*Joined in 2024*

***Revised: January 2025***

# MASLOW PROJECT

## 2023-2024
# ANNUAL REPORT



STABILIZE » ENGAGE » THRIVE

# MARY'S MESSAGE

This coming year is shaping up to be our most ambitious ever! In response to our on-going program success, advocacy, and ability to find and serve our region's unhoused families and youth, Maslow will receive State funding to house an estimated 40 new families over the next 2 years!

Our Mobile Maslow Project will be on the ground this fall, bringing much-needed resources to the rural parts of Southern Oregon. Through our Coordinated Care Organizations, we will be investing in our future, developing a robust long-term strategic plan and growing our capacity to plan and prepare for new health-related benefits to our families while continuing to respond to the pressing housing needs in our region.

There is much work ahead, and, as always, we could never make these impacts without our community of compassionate and generous partners, volunteers, and donors! This report will highlight some of the key impacts from our last year and stay tuned for updates!

## The Difference You Make

# IMPACT BY THE NUMBERS

With the compassionate support of our donors, sponsors, partners and volunteers, Maslow Project served **3,166 youth and families this year!**

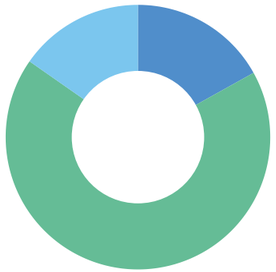
- **2,407** served in Jackson County
- **759** served in Josephine County

### Ages of Youth Served

0-5 Years
16.9%

6-18 Years
67.8%

19-24 Years
15.3%



### Ethnicity

| | | | |
|---|---|---|---|
| 56% White | 25.6% Multi-Racial | 12.2% Hispanic/ Latino/a | 1.8% Native American |
| 1.8% Black/African American | 0.9% Pacific Islander/ Hawaiian | 0.3% Asian | 1.3% Undisclosed |

12.7
Average Age of Youth Served

413
Unaccompanied minors without a parent or guardian

714
Unsheltered living in a car, camping, etc.

711
**Received Case Management & Advocacy Services**

75%
**Made Progress Toward Self-Sufficiency!**
as measured by Self-Sufficiency Scale pre- & post-test

458
**Crisis Interventions**

137
**In Counseling**

# SCHOOL-BASED PROGRAMS

Our school-based case managers:

- Remove educational barriers (transportation, enrollment issues, supply needs, etc.)
- Provide crisis intervention supports and create safety plans.
- Track attendance, goals and academic progress toward graduation.
- Assist with basic needs (food, hygiene products, baby needs).
- Connect youth to essential resources (health insurance, food stamps, mental health counseling, etc.)

## Thank You to Our Partner School Districts!

Together, we meet students where they are to support their educational RETENTION and SUCCESS!

- Ashland School District
- Grants Pass School District #7
- Medford School District
- Phoenix Talent School District
- Three Rivers School District

# SCHOLARSHIP SUPERSTARS

**18**
$1000 Maslow Scholarships Awarded

### ISAIAH

*"Having this scholarship would allow me to better pay my tuition which in turn would keep me from losing the motivation of completing my goal of being a fire fighter."*

### CHARMAINE

*"In five years, I see myself as graduated from college, having opened at least one small business and maybe having a down payment for a house."*

### CARLOS

*"Having this scholarship will give me the necessary resources to afford textbooks and school supplies, giving me the ease of mind and not having the stress."*

### HENRY

*"This funding would cover that gap for my first semester. My plan is to major in physics with an ultimate goal of working in research/lab science or a space agency."*

### ASPEN

*"It will help me be less stressed about finances so I can focus on school. It will also help with purchasing some of the supplies that I need for my school and job training."*

### CHRISTOPHER

*"I am proud that I am the first in my family to graduate from high school. I have been working hard to graduate and stay in school. I am attending RCC to start the trade track to become an electrician so I can help support my family."*

## What is the McKinney-Vento Act?

**The McKinney-Vento Homeless Assistance Act (42 U.S.C. § 11431 et seq.) is a federal law that provides important educational rights and services to PreK-12 children and youth experiencing homelessness, defined as lacking a "fixed, regular and adequate" night-time residence.**

**Maslow Project works to uphold students' McKinney-Vento (MKV) rights.**

## Student Successes

**86%**
**Graduation Rate**
*National average among this population is 68% (SchoolHouse Connection 21-22)*

**95%**
**Made Academic Progress***
**High School Students*

**73%**
**Connected to 2+ Supports**

**83%**
**Made Goal Progress**

# HOUSING

## Permanent Supportive Housing Program

Partnering with Housing Authority of Jackson County

Maslow Project continues to build a mutually beneficial partnership with the Housing Authority of Jackson County (HAJC), where they grant Maslow Project units within their housing complexes so we can directly refer homeless families with children, thereby reducing the long wait they might experience through other programs.

With units all across the Rogue Valley—in Medford, Ashland, Grants Pass and Central Point—our Case Managers are able to serve homeless youth and families by removing barriers, getting them housed and providing ongoing support with everything from costs to landlord engagement.

Our impactful collaboration with HAJC has resulted in an additional 20 Medford units, ready to house Maslow families Fall 2024!

**120**
households supported into housing

**56**
households in our Permanent Supportive Housing Program with HAJC

**24**
households received emergency shelter assistance

**20**
households received financial deposit & application assistance

## Dahlia*

*"I'm so happy every moment, for the little things mostly. It is a luxury to hear my son's feet running across the floor, to be able to take baths and have hot water, to be able to prepare food together and eat at a table together and mostly to feel safe, not worrying all the time. I feel like I can literally breathe again."*

Dahlia grew up in foster care, facing a lifelong struggle with abuse and homelessness. Now, thanks to the support of our donors and partners, she and her son are thriving and can break the cycle. Dahlia is excelling at work and receiving accolades since becoming housed through Maslow's Permanent Supportive Housing Program. Every day her higher needs son runs over to her, gives her a tight hug and says "Mama, I'm so happy."

**Name changed to protect client privacy*

## Nathan

Thanks to your support, Nathan (18) is now stably housed in his own apartment in Grants Pass after a long history of couch surfing. Before getting into housing, he eloquently captured what it's like to experience homelessness as a teen:

*"Homelessness isn't just out on the street. It can be someone who has no one, but they just get by, have to stay at others' places and end up feeling like a bother or like they don't know when it will end or go wrong. That's super stressful when you don't know if you're going to have a roof over your head next week."*

## What's to Come

Two new Housing Programs through the Oregon Rehousing Initiative (ORI) and Youth Emergency Housing Assistance (YEHA).

- Includes funding to provide for move-in costs and long-term rental assistance for up to two years.
- Allows for the addition of two full-time dedicated housing staff to increase housing success.

Maslow is looking for our forever home! We plan to purchase a building where we can consolidate our admin and Medford Resource Center under one roof and eventually expand our programs!

Maslow Project

# RESOURCE CENTERS

Maslow Project Resource Centers in Medford and Grants Pass are safe and welcoming one-stop spots where clients can access free services like case management, housing navigation, advocacy and basic needs.

*Thank you to our loyal volunteers and donors for making the Snack Pack program possible!*

*Thank you donors, sponsors and volunteers for providing 583 supply-filled backpacks for youth!*

*Summer Fun Fridays provided weekly fun activities and free food to Maslow families through the summer.*

*The Maslow Market is where families can shop and pick out food that suits their needs.*

Community

# OUTREACH

Many homeless youth and their families can't make it to our school-based or drop-in resource centers, due to transportation and other access challenges.

To remove barriers, our outreach team travels throughout Josephine and Jackson County to libraries, parks and other community hubs. We provide basic needs and share information about local shelters, resources and services.

Our goal is to build trust and engage youth and families in services to improve safety and connection. Outreach is also critical in locating and supporting youth who otherwise might fall through the cracks.

## The Maslow Mobile Project (MMP)

Thanks to the generosity of the Benjamin and Laura Ellis Charitable Fund, Ford Family Foundation, and our cherished individual donors, the Maslow Mobile Project will soon be a reality and a safe haven for rural families in the Rogue Valley.

The Maslow Mobile Project is a converted sprinter van that will serve as a mobile resource center for bringing much-needed services to homeless youth and families in rural areas.

It is currently being retrofitted with solar panels, Starlink Internet, refrigeration, and cabinetry so we can meet with clients in a private space to provide basic needs, case management services, application assistance and access to other community resources.

**2,515**
*Meals*

**1,934**
*Hygiene*

**1,939**
*Clothing*

**1,122**
*Transportation*

**787**
*Baby Supplies*

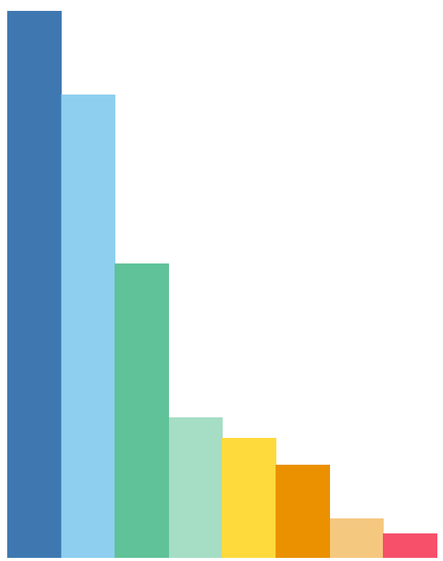
# STABILIZATION

Addressing people's basic needs is of the utmost importance. Our community of donors, funders, businesses, and civic groups help provide food, clothing, hygiene supplies, baby supplies, and a wide variety of other emergency assistance. The flexibility of unrestricted donations gives further ability to meet the individual and changing needs.

Your generosity makes a direct impact, ensuring these youth and families receive the education, stability, and opportunities they deserve. Join us in making a lasting difference in the face of adversity.

## Direct Client Assistance

**$449,963**



- Basic Needs/Clothing **31.8%**
- Food **26.9%**
- Misc. Client Needs **17.1%**
- Deposits/Rent **8.1%**
- Hotels **6.9%**
- Scholarships **5.4%**
- Fees & Records **2.3%**
- Transportation **1.4%**

## Ways You Can Help

**FOLLOW**

@maslowproject

facebook.com/MaslowProject

**DONATE**

MAKE A DONATION

# FINANCIALS

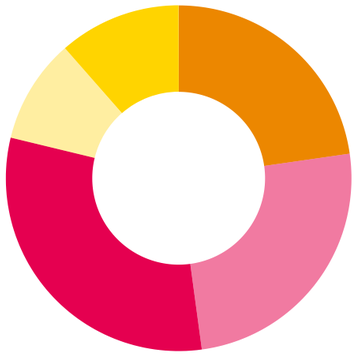
## Total Expenses

**$2,492,563**

- Overhead Costs $253,011
- Administration $446,833
- Program Expenses $ 556,768
- Program Staff $1,235,951

## Total Revenue

**$3,017,744**



- Billable Services $295,732
- Foundations $344,700
- Public Schools $685,814
- Individual Giving $758,397
- Government Grants $933,101

# MASLOW PROJECT

**Mary Ferrell**
*Executive Director*

**Cris Ayson**
*Finance Director*

**Cheyenne Nichols**
*Program Director-Education*

**Matt Northrop**
*Program Director-Housing & Outreach*

**Nicole Ritterbush**
*Staff Supervisor Housing & Outreach*

**Denise Brown**
*Permanent Supportive Housing Case Manager*

**Blanca Duran**
*Bilingual Case Manager*

**Ava Hearn**
*Advocate*

**Nicole Hoefflinger**
*School-Based Team Lead & Case Manager*

**Mauro Reyes-Lopez**
*Bilingual Case Manager*

**Fallon Stewart**
*Program Support Specialist*

**Casey Stine**
*Case Manager & Outreach*

**Brandy Stromme**
*Grants Pass Team Lead & Case Manager*

**Laura Tagg**
*Case Manager*

**Aris Villa Saucedo**
*Bilingual Case Manager*

**Erin Zelinka**
*Community Engagement Officer*

## Board of Directors

**Lisa Morris, FNP**
*Chair*

**Scott Clauson**
*Vice Chair*

**Amy Zarosinski**
*Treasurer*

**Sharilyn Cano**
*Secretary*

**Sara DeVries**
*Member*

**Jamie L. Hazlett, Esq.**
*Member*

**Ray Hetzer**
*Member*

# CITY OF ASHLAND

## 2025 Program Year Community Development Block Grant (CDBG) Public Service Application

### I. APPLICANT INFORMATION

**Applicant Organization Name:** Opportunities for Housing, Resources and Assistance

**Executive Director's Name(s):** Daniel Cano

**Board Member Names:** Attached

**Applicant Mailing Address:** PO Box 1133, Ashland, OR 97520

**Applicant Street Address:** 2350 Ashland Street, Ashland, OR 97520-1408

**IRS Classification:** 501(c)(3)

**Federal Tax ID#:** 61-1693223

**Mission Statement**: OHRA helps low-income people build better lives. By offering hope and access to social service resources, we encourage those in need on the path to self-sufficiency. By helping people move from crisis to stability, OHRA builds more capable individuals, stronger families and a better community.

**Total Employees**: 39 **Total Volunteers**: 40

### II. CONTACT PERSON

**Name:** David Stoebel

**Title:** Grants Specialist

**Phone Number:** 415-858-3334

**Fax Number:** 541 482-2291

**E-mail Address:** daves@ohrahelps.org

### III. PROJECT INFORMATION SUMMARY

**Project Name or Title:** Shower Trailer Outreach to Unhoused Ashland Residents

**Expected Completion Date:** June 30, 2026

**Requested CDBG Funds:** $ 24,395

**Organizational Match:** $ 10,000

**Funds from Other Sources:** $301,131

**Total Project Cost:** $335,526

## Application Contents

1) Complete Application Form

## 2) Project summary

The requested funds will support the expansion of OHRA's Laundry Shower Trailer (LST) program to better serve North Ashland. This expansion includes adding a day of operation and increasing access to unhoused people living in North Ashland.

The OHRA LST has operated for more than 10 years providing hygiene services and a key site for outreach to unhoused people, especially those who have not accessed OHRA navigation at our Resource Center. It also has become a hub for health and other services provided by OHRA community partners.

Currently OHRA operates one LST at the OHRA Center on Ashland Street near Exit 14 two days per week. If funded, this grant will increase the LST operation to three days per week. If possible, one of those days will be at a site in north Ashland.

The project objectives are:

1. Increase the number of showers and laundry loads we provide by 50%.
2. Provide LST services in North Ashland at least one day per week if an acceptable site can be found.
3. Alternatively, provide transportation at a designated site from north Ashland at least one day per week for unhoused people to use the LST at its current location in south Ashland.
4. Provide an opportunity for community volunteers to serve and make connections with unhoused people. (Several volunteers currently serve at the LST. We intend for this new phase to expand volunteer participation).

## 3) Briefly describe the services to be provided, if any, and describe the eligible target population receiving direct benefit from these services (low-income, homeless, special needs).

In FY2023-24, OHRA contacted more than 800 unhoused people who came to our center on Ashland Street. While this is a significant number, we know that there are unhoused people residing on the north side of Ashland who have not come to our center. By offering the LST together with outreach navigation we will be providing a path for unhoused Ashland residents to access supportive services including Rapid Rehousing and others that improve health, general safety and self-sufficiency.

Specific services will include.

1. Increase the average weekly number of showers we provide from 56 to 84 and the average number of laundry loads washed and dried from 29 to 43.
2. Provide at least 18 hours per week of outreach navigation including 9 by a bi-lingual navigator when feasible.
3. Distribute hygiene and other essential supplies to program guests.

We recognize that finding a partner in north Ashland to host the LST may be a challenge. We will work with the city and other community partners to seek a suitable north Ashland location for the LST where local residents are comfortable and there are the necessary power, water and waste hook-ups. If we find a location, we will open the LST there once per week, offering outreach and navigation support and will work with our service delivery partners including the Jackson County Library, OHSU Street Nurses and La Clinica to offer more services. If we do not find a site in north Ashland, we will keep

the LST at its current location and provide transportation from north Ashland using a van we purchased using SB 1155 funds provided by the City of Ashland.

**4) A work program and timeline including a complete list of tasks with estimated start and completion of each task**

See Form A

**5) Financial Information** (project budget)

See Form B-2

**6) Eligibility for Federal Funding**

## General Information

**7) OHRA Mission and Service History**: OHRA's mission is *"to help low-income people build better lives. By offering hope and access to social service resources, we encourage those in need on the path to self-sufficiency. By helping people move from crisis to stability, OHRA builds more capable individuals, stronger families and a better community."*

Since we opened in 2014, OHRA has provided support services for homelessness prevention and transition as part of a comprehensive approach that improves guests' living conditions.

OHRA began operating the LST in our first year, staffed entirely by volunteers. In those early years the LST became our key street outreach activity bringing many unhoused people to our resource center where they could receive self-sufficiency promoting services.

Our primary focus has always been on assisting unhoused people and those facing eviction to overcome barriers and build resources with the goal of becoming or staying housed. At the core of our work is our team of resource navigators who assist guests to define and surmount their barriers to stability with the ultimate goal of becoming permanently housed.

In our initial years, our community partners provided funds for rent while our navigators found willing landlords and assisted guests to overcome bureaucratic, logistic and other barriers to sustainability. Since 2020 we have received state and federal emergency funds that have expanded the amount of rental assistance we can provide. Since 2021 we have used these funds to rapidly rehouse more than 480 households (705 individuals including 144 children) and to provide rental assistance to more than 825 households threatened with eviction (1,515 individuals including 500 children).

As a grantee receiving more than $750,000 in federal funds annually, we have undergone an audit every year since 2021.

**8) Promoting self-sufficiency for extremely low-, low- moderate-income families, or individuals with special needs?**

As part of this program, OHRA navigators will outreach to unhoused youth, young adults, and other unhoused individuals using the LST and help them access resources to move toward more stable, self-sufficient lives. In doing this, they will be promoting unhoused people's capacity to become and remain self-sufficient. All of the people we propose to serve will be of extremely low income.

**9) Project Benefit to extremely low-, low- and moderate-income individuals or individuals with special needs:**

The project will serve unhoused individuals living in Ashland. By definition, all of these will be extremely low-income individuals. On May 2, 2024, members of the Ashland Homeless Services Masterplan Subcommittee and students from the OHSU School of Nursing conducted a Point in Time Count in Ashland. The count identified 181 people

meeting the definition of unhoused, of these 127 were living unsheltered. The surveyors state that this is probably an underestimate because rainy weather on the day of the count made it likely that some people were sheltering and not visible. The majority of people identified in the count were between the ages of 25 and 64 years old (83.3%) and 71.4% identified as male. This gender distribution differs from that of the 2023 Jackson County PIT Count which identified 64.4% male, 34.7% female, and <1% non-binary.

Based on our records since July 1, 2024, we anticipate that our outreach team will contact at least 150 extremely low-income people during the year and provide them with information, referrals and other assistance intended to help them improve their situation and move toward more stable lives.

**10) Project Feasibility**

As described in item 7, OHRA has been serving unhoused people in Ashland through the LST and its Resource Center since 2014. In that time, our LST has delivered more than 14,000 showers and 5,700 loads of laundry. Our team of trauma-informed resource navigators know and understand what unhoused people need. Using state-of-the-art methods including motivational interviewing they are skilled at helping unhoused people identify and surmount barriers and move toward self-sufficiency. In the 11 years that OHRA has operated navigators have successfully rehoused more than 990 individuals. When available, our Bi-lingual Outreach Navigator will be deployed to the OHRA Laundry and Shower Trailer to ensure bilingual access. This project will expand this well established and successful LST program with its direct linkage to OHRA's Rapid Rehousing and other self-sufficiency promoting services provided by our Resource Navigators.

**11) Please attach any other statistical data, letters of support, applicable experience of the sponsor, evidence of financial support from other funding sources, or other material you believe will assist the City in its review of your proposal.**

See Attached

**CITY OF ASHLAND**
**2025 Program Year**
**CDBG PUBLIC SERVICE APPLICATION CHECKLIST**

In order to determine compliance with all applicable HUD regulations and to help to ensure that projects will be eligible for CDBG funding, the City of Ashland will need to address all HUD requirements. The purpose of this checklist is to point out areas where potential problems could arise. Obviously, this is a comprehensive list, which must evaluate a wide array of different kinds of proposals. Therefore, not every item will be applicable to every project. **Please fill it out entirely indicating all items which are not applicable and include it as part of your proposal application.**

| A. Applicant's Background | Yes | No | N/A |
|---|---|---|---|
| 1. Is the applicant a legal non-profit organization or unit of government? | X | | |
| 2. Do the proposed clients or users of the project meet HUD Income Guidelines (see page 10 for guidelines)? | X | | |
| 3. Does applicant have the capability to maintain written income documentation? | X | | |
| 4. Is the applicant primarily a religious organization? | | X | |
| 5. Has the applicant administered a CDBG project previously? | X | | |
| 6. Is your agency willing and able to provide all required reports and accountability to the City as required by HUD? | X | | |

**Form A-2**
**o be completed for Social Service Proposals Social Services Proposals**

| Activity | Start Date | Completion Date |
|---|---|---|
| Identify sites in north Ashland for LST deployment | 5/1/25 | 6/30/25 |
| Identify partner organizations wishing to co-locate with OHRA at new sites. | 5/1/25 | 5/31/25 |
| If deployment site not identified, begin street outreach to unhoused people informing of transportation pick-up locations and times | 6/1/25 | 6/30/26 |
| Initiate North Ashland LST site or transportation program. | 7/1/25 | 6/30/26 |
| Deliver LST and transportation services as described. | 7/1/25 | 6/30/26 |

**Form B-2**
**To be completed for Social Service Proposals**

| | Total Cost | CDBG Request | Other Source(s) |
|---|---|---|---|
| Direct Client Services | | | |
| Wages of personnel providing direct client Services | $58,032 | $24,395 | $33,637 |
| Materials/Supplies | $228,729 | $0 | $228,729 |
| Marketing/Outreach | $5,000 | 0 | $5,000 |
| Program Administration | $43,764 | $0 | $43,764 |
| **TOTAL** | **$335,526** | **$24,395** | **$311,131** |

## Form D DISCLOSURE OF INTERESTS

To assist the City of Ashland in determining whether there may be a potential conflict of interest related to the expenditure of Community Development Block Grant funds we request the following information be provided by applicants:

**ORGANIZATION NAME**: **Opportunities for Housing, Resources and Assistance**

**ORGANIZATION IS:** **Non-Profit 501C3 (X)**

### DISCLOSURE QUESTIONS

1. State the names of each "employee" of the City of Ashland having a financial or personal interest in the above-mentioned "organization" or project proposed.

**NOT APPLICABLE**

2. State the name(s) of any current or prior elected or appointed "official" of the City of Ashland having a potential "financial interest" in the organization or project.

**NOT APPLICABLE**

3. Provide the names of each "board member" of the Organization seeking CDBG funding Name Board, Commission, or Committee (may be attached as a separate Sheet)

| Opportunities for Housing, Resources and Assistance<br>Board of Directors<br>2024-25 | | |
|---|---|---|
| **Last Name** | **First Name** | **Role** |
| Gerbracht | Cathy | President |
| Zeve | Deneice | Vice President |
| Piker | Eileen | Treasurer |
| de Ryss | Diane | Secretary and Past President |
| Gill | Libby | Member |
| Gillooly | Kate | Member |
| Greenspan | Catherine | Member |
| Pease | Jordan | Member |
| Rojas | Diego | Member |
| Smith | Sean | Member |
| Sommers | David | Member |
| Strobel | Brett | Member |

## Attachment

### Statistical Data

| OHRA Statistics 2023-24 | |
|---|---|
| **Total Resource Center Visits** | 17,548 |
| **Unduplicated Number Served** | |
| Resource Center | 2,042 |
| OHRA Shelter | 207 |
| City of Ashland Emergency Shelter | 73 |
| Severe Weather Shelter | 161 |
| **Services Rendered** | 0 |
| **Resource Center Services** | 0 |
| Jobs Services | 36 |
| Housing Services | 520 |
| ID Services | 104 |
| Mail Services | 5,120 |
| All Other Services | 3,423 |
| **TOTAL ALL SERVICES** | 9,203 |
| | |
| **Landry/Shower Trailer Services** | |
| Showers | 1,754 |
| Laundry | 930 |
| | |
| **Shelter Services** | |
| OHRA Laundry for Shelter Guests | 213 |
| Jobs Services | 9 |
| Housing Services | 360 |
| Benefits Assistance | 44 |
| All Other Services | 975 |
| **TOTAL ALL SERVICES** | **1,601** |
| | |
| **Total Services All OHRA Programs** | **15,310** |
| | |
| **RESULTS** | |
| Families in New Housing | 147 |
| Male | 86 |
| Female | 101 |
| Children | 93 |
| **TOTAL INDIVIUDALS** | **280** |
| | |
| Families Housing Protected | **307** |
| Male | 149 |

| | |
|---|---|
| Female | 199 |
| Children | 214 |
| **TOTAL INDIVIUDALS** | **562** |

**Evidence of Financial Support**

The OHRA Budget for 2025-26 has not been developed thus projections for the LST's support in that year have not been made. We can state however, that the LST has always been a top priority program and has always been fully funded.

OHRA's annual budget is in excess of $4,000,000. To date in FY 24-25, OHRA has obtained $3,658,338 in grant funding from government and private sources (see list below). Most of these are either funds to be passed through to guests for rental assistance or for Shelter operations.

| |
|---|
| ACCESS Emergency Housing Assistance |
| ACCESS Long-term Rental Assistance |
| ACCESS OPSS |
| ACCESS SHAP |
| Carpenter Foundation |
| Chaney Family Foundation |
| City of Ashland SB 5511 |
| Cow Creek Umpqua Indian Foundation |
| Ford Family Foundation |
| Herbert Templeton Trust |
| Jackson Care Connect PMPM |
| Jackson Care Connect SHARE |
| Jackson Co Department of Mental Health |
| Joseph Weston Foundation |
| OCF Community Grant |
| OCF Walker Family Fund |

# Housing And Human Services Committee Minutes

# DRAFT

**March 27, 2025**

REGULAR MEETING

Minutes

| Commissioner's Present: | Council Liaison: |
|---|---|
| Echo Fields | Bob Kaplan |
| Noah Werthaiser | Dylan Bloom - Absent |
| Vincent Tufts | Staff Present: |
| Montana Hauser | Linda Reid; Housing Program Specialist - Absent |
| Rich Rohde | |
| Commissioner's Absent: | SOU Liaison: |
| Ashley Laube | Tiana Gilliland – Absent |
| Jim Dykstra | |

## I. CALL TO ORDER: 4:00 p.m.

## II. APPROVAL OF THE AGENDA

## III. CONSENT AGENDA

**A.** Approval of February 27, 2025, Minutes

**Werthaiser/Rohde .M/S. Voice Vote: ALL AYES. The minutes from February 27, 2025, meeting have been approved as presented.**

## IV. PUBLIC FORUM (4:05-4:15 p.m.)

**A.** Public Forum.

- N/A

## V. NEW BUSINESS

**A.** CDBG Applicant Presentations (4:15-4:35 p.m.) Chyenne Nichols provided a presentation for the Maslow Project, and Lisa Smith provided a presentation for OHRA.

**B.** CDBG Application Review and Funding Recommendation (4:35-5:05p.m.)

**Werthaiser/Rohde M/S-Move to fully fund Maslow Project at the requested amount of $18,000 with the remaining balance to be awarded to OHRA to support the expansion of the Laundry Shower program to the North end of town. -Motion**

**approved unanimously.**

**C.** CDBG Draft Consolidated Plan Review and Recommendation (5:05-5:35)

**Tufts/Hauser M/S- Move to approve the 2025-2029 Consolidated Plan for the use of CDBG funds with the suggested edits of changing the term workforce housing to middle housing, and some additional minor edits submitted between the HHSAC meeting and the public hearing before the City Council on April 15, 2025.-Motion approved unanimously.**

## VI. UNFINISHED BUSINESS

**A.** Community Resource Event Debrief (4:35-5:05p.m)

- The Committee would like to hold the event earlier in the year when the weather is better, looking at September.
- The committee would like to create a summary of the event for marketing.
- Add the question, how did you hear about this event,
- Invite HRSN-Medicare/Medicaid homeless prevention funding program providers= as this is a source of funding that can provide housing.
- Invite someone from the employment department.

## VII. INFORMATIONAL ITEMS

**A.** Liaison Reports

- Councilor Bloom presented the Council report.
  - The City is facing a budget shortfall, committee members were encouraged to watch the upcoming Study Session for more information.

**B.** General Announcements

None

## VIII. AGENDA BUILDING – Future Meetings

- Check with Brandon and the Consultant on the appointment process for the Manufactured Home park ordinance work group.
- Rohde asked about the Committee getting a shelter report for the 2200 Ashland Street Shelter.
- Nominees and voting for the Vice Chair position.

## IX. ADJOURNMENT: 6:15 p.m.

In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please email linda.reid@ashland.or.us. Notification 72 hours prior to the meeting will enable the City to make reasonable arrangements to ensure accessibility to the meeting (28 CFR 35.102-35.104 ADA Title 1).

# Council Business Meeting

**Date**: April 15, 2025

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| **Agenda Item** | Public Hearing and Decision on the 2025-2029 Consolidated Plan for use of Community Development Block Grant Funds |
| **From** | Linda Reid, Housing Program Manager |
| **Contact** | linda.reid@ashland.or.us |

## SUMMARY

The City of Ashland is an entitlement jurisdiction, receiving an annual allocation of Community Development Block Grant (CDBG) funds from the U.S. Department of Housing and Urban Development (HUD). As a recipient of CDBG funds, the City is required to prepare a five-year strategic plan that identifies housing and community needs, prioritizes these needs, identifies resources to address needs, and establishes annual goals and objectives to meet the identified needs.

## POLICIES, PLANS & GOALS SUPPORTED

The Community Development Block Grant (CDBG) program is guided by the Code of Federal Regulations (CFR), primarily found in: Title 24 of the CFR – Housing and Urban Development, specifically 24 CFR Part 570 – Community Development Block Grants.

Ashland's Adopted 2020-2024 Consolidated Plan 5-year strategic plan for the use of community development block grant (CDBG) funds: https://www.ashland.or.us/Files/Con_Plan_Final_Adopted_Version.pdf

## BACKGROUND AND ADDITIONAL INFORMATION

The City of Ashland 2025-2029 Consolidated Plan is a five-year strategic plan to provide an outline of action for the community as it works toward meeting the housing and community development needs of its low- and moderate-income households. The plan's development includes a profile of the community and its economy, an assessment of the housing, community development and public service needs of its residents, and sets out long-range strategies to meet those needs.

The Consolidated Plan for the use of CDBG funds serves the following functions:

- A planning document for the jurisdiction, which builds on a participatory process among citizens, organizations, businesses, and other stakeholders.
- A submission for federal funds under HUD's formula grant programs for jurisdictions.
- A strategy to be followed in carrying out HUD programs; and
- A management tool for assessing performance and tracking results.

The Department of Housing and Urban Development has set guidelines regarding the use of Community Development Block grant funds. The City's plan was compiled in accordance with federal regulations and contains tables required by HUD. The stated goals and objectives for the use of CDBG funds are in accordance with prescribed HUD performance and outcome reporting guidelines.

The City is required to update the Consolidated Plan every five years in order to continue receiving CDBG funds and to modify the plan according to changing conditions if needed. The City's first Consolidated Plan covered 1995-1999 and was adopted in June 1995. The current plan, the 2020-2024 Consolidated Plan, was drafted in 2020, and expires on June 30, 2025.

Ashland began receiving an annual allocation of CDBG funds in 1994. Some of the projects funded by CDBG dollars over the past 31 years include the remodel of the OHRA Center, the acquisition of land to support the development of affordable rental and ownership housing throughout the City. Emergency repairs to homes owned and occupied by low-income and moderate-income families, and seniors and peoples with disabilities through the Housing Authority of Jackson County, Habitat for Humanity Rogue Valley, and Rebuilding Together, ADA improvements to City Buildings and street and sidewalk and public facilities improvements in support of affordable housing, special needs housing and accessibility, and homeless populations.

To inform the development of the 2025-2029 Consolidated Plan the City and the Housing and Human Services Advisory Committee conducted a number of in-person questionnaires with citizens at a variety of community engagement events, and with housing and social service providers through a direct email campaign. The City held a public hearing to elicit information about the housing and community development needs in the City of Ashland before the Housing and Human Services Advisory Committee.

The Federal regulations prescribe the data that must be included in the plan, the timeline for the plan update, and the community involvement process. The Federal plan requirements stipulate that the most recently completed Census (2020) as well as American Community Survey data is used as a basis for the plan's demographic information. Many of the tables included in the plan use a custom tabulation of data from the census bureau that are not available through standard census products. This data is known as CHAS (Comprehensive Housing Affordability Strategy) data. This data is used to determine the extent of housing problems and housing needs within a community particularly for low-income households. The City has also supplemented this data with information made available from local and state resources. As a result of these efforts there is valuable data in the plan that provides information to support ongoing housing and social service objectives.

The purpose of the Consolidated Plan is to outline a strategy for the City to follow in using CDBG funding to achieve the goal of the CDBG program, "*to develop viable urban communities by providing decent housing and a suitable living environment and expanding economic opportunities principally for low- and moderate-income persons.*"

Based on research compiled from a variety of sources, data analysis, consultations with housing and service providers, interviews and input from citizens and beneficiary groups, City staff have identified six broad areas of priority need that the City will focus its CDBG resources toward over the next five years:

- To create and maintain affordable housing units benefiting low-, moderate-income individuals and other CDBG eligible populations including special needs and elderly.
- Support services for homelessness outreach, prevention, and transition.
- Support housing and services for people with special needs.
- Improve safety and access in neighborhoods and areas throughout the City.

- Improve transportation options for low-income and special needs populations
- Support Economic Development activities that assist in reducing poverty among low-, moderate-income and special needs populations.

As part of the update process, two public hearings are required. One hearing must be held during the development of the plan, and one hearing held after a draft is completed. The first hearing was held on March 27, 2025, by the Housing and Human Services Commission. As the decision-making body, the completed Draft 2025-2029 Consolidated Plan is presented to the City Council for adoption. The final approved plan shall be submitted to HUD by May 15, 2025, for their review and approval.

The Housing and Human Services Advisory Committee recommends the Council approve the 2025-2029 CDBG Consolidated Plan with minor changes, including changing the word workforce housing to middle housing. The Housing and Human Services Advisory Committee's recommended changes have been incorporated into the document presented to the Council for approval. Staff recommends the adoption of the plan as amended by the HHSAC, and as submitted.

**FISCAL IMPACTS**

The City has been receiving a diminishing allocation of CDBG funding each year, receiving approximately $162,000 in CDBG funds from the department of Housing and Urban Development each year. The Consolidated Plan identifies priorities for the use of these CDBG funds.

**SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS**

"I move to approve the 2025–2029 Consolidated Plan for the use of Community Development Block Grant funds as presented, including the minor revisions recommended by the Housing and Human Services Advisory Committee."

**REFERENCES & ATTACHMENTS**

1. Draft 2025-2029 CDBG Consolidated Plan

# 2025-2029 CONSOLIDATED PLAN

5-Year Strategic Plan

For the use of Community Development Block Grant (CDBG) funds

Adopted by:

Ashland City Council

TBD

Prepared for:

The U.S. Department of Housing and Urban Development

By: Linda Reid

The City of Ashland

Department of Community Development

Planning and Housing Division



OMB Control No: 2506-0117 (exp. 09/30/2021)

# Executive Summary

## ES-05 Executive Summary - 24 CFR 91.200(c), 91.220(b)

### 1. Introduction

The City of Ashland 2025-2029 Consolidated Plan is a five-year strategic plan to provide an outline of action for the community as it works toward meeting the housing and community development needs of its low-and moderate-income and special needs households. The plan's development includes a profile of the community and its economy, and assessment of housing and community development needs, and the development of long-range strategies to meet those needs.

The City of Ashland is an entitlement jurisdiction, receiving an annual allocation of Community Development Block grant (CDBG) funds from the U.S. Department of Housing and Urban Development (HUD). As a recipient of CDBG funds, the City is required to prepare a five-year strategic plan that identifies housing and community needs, prioritizes these needs, identifies resources to address needs, and establishes annual goals and objectives to meet the identified needs. This five-year plan is known as the Consolidated Plan. The Consolidated Plan serves the following functions:

- A planning document for the jurisdiction, which builds on a participatory process among citizens, organizations, businesses, and other stakeholders;
- A submission for federal funds under HUD's formula grant programs for jurisdictions;
- A strategy to be followed in carrying out HUD programs; and
- A management tool for assessing performance and tracking results.

The purpose of the Consolidated Plan is to outline a strategy for the City to follow in using CDBG funding to achieve the goal of the CDBG program; "*to develop viable urban communities by providing decent housing and a suitable living environment and expanding economic opportunities principally for low- and moderate-income people*."

### 2. Summary of the objectives and outcomes identified in the Plan Needs Assessment Overview

**<u>Summary of Objectives and Outcomes identified through the Citizen Participation Process</u>**

Objectives identified through numerous citizen consultation processes in prior years have included Housing and Housing Related Activities that focus on the preservation of existing affordable units, new construction of affordable rental housing and rehab of existing units, development of rental housing for low income and small families and ownership assistance for low-income families. Citizen consultations have also prioritized service activities, such as services for people experiencing mental health issues, crisis support services, and homeless support services. Because these issues are endemic throughout the nation, and because the City of Ashland receives very little support from CDBG, progress in

addressing these issues is minimal at best. Therefore, these activities continue to be direly needed and therefore prioritized for the use of CDBG funding.

**Summary of Objectives and Outcomes identified through the Agency Consultation Process**

Priorities identified through the agency consultation process were gathered through a direct email feedback process. The priorities identified by agencies were primarily the same as those identified above. It should be noted that the resource and priority needs are most often identified by both agencies and the general population where access to services, such as mental health services, housing navigation and case management. These are all activities which have a limited ability to be funded by CDBG funding.

**Summary of Objectives and Outcomes identified through the Community Needs Assessment/Market Analysis Process**

Based on research compiled from a variety of sources including data analysis, and input from citizens and beneficiary groups, City staff have identified six broad areas to ensure that the City has options for all eligible CDBG activities, and addresses priority needs within the City to focus CDBG resources toward over the next five years.

- To create and maintain affordable housing units/units occupied by low-, and moderate-income and smaller units for small families.
- Support services for homelessness outreach, prevention, and transition.
- Support services for people with mental illness.
- Support services for people in crisis.
- Improve transportation options for low-income and special needs populations
- Support Economic Development activities that assist in reducing poverty among low-, moderate-income and special needs populations.

## 3. Evaluation of past performance

The goals and priorities identified in the 2020-2025 Consolidated plan represent the most pressing needs identified in the Ashland community at the time. Many if not all the needs identified in the City are not unique to Ashland alone. These needs are representative of larger systemic issues experienced across a spectrum of large urban and small rural communities throughout the country that are a consequence of a lack of housing that if available at price-points affordable for a growing majority of the American population.

For the past twenty years the City has identified the provision of affordable housing (both ownership and rental) as the highest priority need and target for the use of CDBG funding. In that time the City has met its housing goals more often than not, which is quite remarkable considering the barriers that small CDBG entitlement jurisdictions such as Ashland face. While the CDBG program did not add any new affordable units within the previous 5-year period, the City is on track to see the development of several units of affordable housing in the near future. In 2021 the City of Ashland completed an update of the

City's Housing Capacity Analysis (HCA). At that time the HCA found that Cost burden in Ashland increased from 41% in 2000 to 46% in 2014-2018 based on data from the Census' American Community Survey. Housing affordability is a challenge across Jackson County, with housing costs in Ashland considerably above regional averages. In 2020, the median home sales price in Ashland was $530,000, more than $115,000 above the median sales prices for elsewhere in the County. In addition, 46% of Ashland's households were cost burdened, more than the county average of 39% of households. The Almeda wildfire increased the regional need for affordable housing by destroying about 2,549 dwellings in September 2020. The Almeda fire burned from north Ashland to just south of Medford, with the cities of Phoenix and Talent suffering the most housing loss. These losses increased the regional need for affordable housing and overall pressure on the housing market throughout the County.

Housing prices are increasing faster than incomes in Ashland and Jackson County, which is consistent with state and national challenges. The continuing long-term trend of housing and transportation costs outstripping incomes has exacerbated the demand for affordable housing throughout the state. The increasing need for affordable housing units has taxed the traditional methods of funding affordable housing and cannot be sustained into the future should the trend continue.[1]

**Strategies and Impact on Identified Needs**

*Housing*

Over the past 20 years the City has identified and prioritized the development, maintenance and preservation of affordable housing as its preferred use of CDBG funding. In that time the City has made great strides with regard to supporting the development of affordable ownership and rental units. Since 2004 CDBG funds have been used to support the acquisition, development, and/or rehabilitation of 186 ownership and rental units within the City of Ashland. However, many of the newly developed units in the past several years have received no CDBG funds. In recent years, developers have cited Federal regulations, specifically National Environmental Protection Act (NEPA) requirements, and Davis Bacon wage rates as significant barriers to utilizing CDBG for the development of housing units. The City has not utilized CDBG funds to support affordable housing projects other than rehabilitation of existing units since 2011. Given this recent trend, it seems increasingly unlikely that affordable housing providers will be seeking CDBG funding to fund affordable housing development in Ashland over the five-year period covered by this Consolidated Plan.

*Homelessness*

During the pandemic and in the wake of the Almeda fire, the City addressed the provision of services to serve homeless populations, as an emergency measure. Though the homeless populations have always had access to countywide services, transportation to and from Medford, the City where the most resources are located, can be challenging. Over the past several years the City has invested a large share of its CDBG funding as well as other funding and support to increase the number and scope of local

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resources to address the issues of homelessness. In the past ten years CDBG funds have been used to support staff efforts to provide community education, generate new and needed resources, and coordinate with homeless and at-risk service providers to address their needs and undertake strategic planning at a regional level. Over the past several years the City has provided CDBG funds to assist the Maslow Project in providing services to over one thousand extremely low income homeless and at-risk youth. The City has also continuously provided funding support to Options for Housing, Resources and assistance (OHRA), a non-profit formed in 2012 that operates an emergency shelter, a resource center, a laundry shower trailer, and provides rental assistance and housing navigation services.

Looking forward to the next five-year period, city staff sees that in general the goals and strategies for the development and retention of affordable housing and for alleviating the issues of homelessness that have been outlined in previous Consolidated Plans will need to be continued. While the issues of homelessness and a lack of housing units affordable to low- and moderate- income households still exist in the Ashland community it is evident that their persistence is not due to a lack of successful implementation of identified strategies, or to the efficacy of the strategies themselves, but rather to the enormity and complexity of these multi-facetted problems. Many of the factors that contribute to the problems are beyond the reach of jurisdictional policies and are certainly beyond the capacity of the CDBG program to address on its own. Ashland is committed to continuing to explore additional funding opportunities and refining current strategies in order to coordinate and develop sustainable resources for addressing homelessness in our community.

## 4. Summary of citizen participation process and consultation process

The City of Ashland has established a Public Participation Plan to provide opportunities for citizen involvement in the process of developing and implementing the Community Development Block Grant (CDBG) Program and other programs administered the U.S. Department of Housing and Urban Development-HUD) and the City of Ashland Consolidated Plan. This Public Participation Plan outlines when, where, and how citizens can access information, review and comment on major community plans and comment on the progress of funded activities. The Primary planning document is the Consolidated Plan, which is developed every five years to serve as the guide for strategic actions and the Annual Action Plan which describes the specific actions and project activities the City will conduct during the year using the CDBG funds.

The City of Ashland encourages the participation of all its citizens in the development of plans and in reviewing progress in implementing the planned activities. The City is particularly interested in the involvement of low- and moderate-income households, including those in low-income housing, as they are the primary beneficiaries of the CDBG funds. Opportunities for involvement are offered prior to and during the development of long-range strategic plans and annual action plans as well as on an ongoing basis during the implementation of activities described in those plans. These opportunities include:

- Participation at public hearings to discuss needs, progress on project activities and the amount of funds available for activities
- Participation in meetings with committees, Neighborhood Councils and Commissions involved in planning housing and community development activities



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- Review and comments on proposed plans such as:
  - Public Participation Plan
  - Consolidated Plan
  - Annual Plans
  - Amendments to Plans
- Review and Comment on Annual Performance Reports describing progress on project activities.

**The Public Participation Structure**

The City has established the Ashland Housing and Human Services Advisory Committee as the primary citizen body to advise the City Council on the housing and human service needs of the community and the use of CDBG Funds. The Committee consists of 9 voting members and a City Council liaison and is staffed by Housing Program Staff. All members are appointed by the Mayor and confirmed by the City Council. The Committee meets on a monthly basis serving as an informed link between the citizens and the council. All Housing and Human Services Advisory Committee meetings are open to the public and allow public comments on any item on the agenda or as general comments under the public forum portion of the meetings.

CDBG Public Hearings are conducted at least four times a year. A Public Hearing will also be conducted to consider any substantial amendments to planned activities or funding allocations of the approved Consolidated Plan or Annual Action Plan. These hearings provide an opportunity for citizens to input into planning for the use of CDBG funds, commenting on the award of CDBG funds, and disseminating information on the progress of on-going housing and community development activities.

**Public Meetings and Hearings**

During the development of the Consolidated Plan and Action Plans, City staff will meet with social service agencies and affordable housing providers to provide information on the uses of the CDBG funds and hear discussions on needs. In addition, the Ashland Housing and Human Services Advisory Committee will meet to discuss the components of the plan including the needs assessment, the strategic plan and the Annual Action Plans. The Committee also reviews and recommends action to the Council on the Consolidated Plan, Annual Action Plan and any substantial amendments proposed to those plans. The Housing and Human Services Advisory Committee shall also review the Consolidated Annual Performance Evaluation Report each year to examine the performance of the projects funded as a whole or in part with CDBG funds. All oral and written comments will be considered in decisions on the CDBG Program and planning documents.

**Purpose of the Public Hearings**

A minimum of four Public Hearings will be held during the year to obtain the comment of citizens and representatives of public agencies, non-profit organizations and other interested parties. The Hearings provide opportunities to obtain the views of citizens on housing and community development needs, information on the amount of funds available and the purposes for which it can be used, discuss proposed activities and review of program performance over the previous year.

Action Plan Development hearing: The Ashland Housing and Human Services Advisory Committee will hold a public hearing to review proposed applications for use of CDBG funds and recommend award allocations to the City Council. Testimony will be received regarding needs and how proposed projects best address the priorities of the Consolidated Plan to inform the development of the annual action plan.

CDBG Award Hearing: The City Council shall review CDBG project proposals on an annual basis at a public hearing, review the recommendations of the Housing and Human Services Advisory Committee, and award CDBG funds to eligible projects that demonstrate the most effective use of CDBG funds to benefit extremely low, or low-moderate income residents. The Council will make the final sub-recipient selection and award allocation and will identify the use of CDBG funds thereby defining the goals outlined in the annual Action Plan.

CDBG Action Plan Hearing: The Housing and Human Services Advisory Committee shall review and approve the CDBG Action Plan at a public hearing. The Action Plan will identify how the awards made by the Council will meet the goals outlined in the Consolidated Plan for the use of CDBG funds for a given program year.

Consolidated Annual Performance Evaluation Report (CAPER) Hearing: At the conclusion of each program year the CAPER will be presented at a public hearing before the Ashland Housing and Human Services Advisory Committee to allow a public response to the activities undertaken in the prior year.

**Location of Hearings**

The Hearings will be located and timed to ensure maximum opportunities for citizens to participate. Hearings will be conducted in buildings that are accessible to people with physical disabilities.

**Expanding Opportunities for All to Participate at Hearings**

The City encourages all citizens to participate. A special effort will be made to assure that low- and moderate-income persons, households in areas targeted for CDBG assistance, minorities, people who do not speak or understand English well and persons with disabilities are made aware of the Hearings and are able to fully participate in all stages of the planning process. Upon 72-hour notice, the City will provide public notices and summaries of information in other languages, will make reasonable efforts to provide translators for non-English speaking persons at meetings and Hearings and will take steps to accommodate persons with disabilities needing assistance. To arrange for assistance, requests must be made to the City Administrator's Office at least 5 days prior to the scheduled meeting or Hearing.

**Notification of Hearing Dates**

Notices of Public Hearings for the Consolidated Plan will be published in the City Source, a direct mailing sent to all households within Ashland, and in the Ashland News at least 15 days prior to the meetings. Notices for all other Public Hearings will be posted on the City website and will also be mailed or emailed to the Housing Authority of Jackson County to post for tenants of assisted and public housing residing in the City.

**Opportunities to Comment on Draft Plans and Reports**

There are a number of opportunities to comment on draft plans and reports related to the Consolidated Plan. Prior to their submission to HUD, the City will consider fully all comments received on these plans within the timeframes identified below.

**The Public Participation Plan**

This Public Participation Plan outlines the steps the City will take to provide citizens with opportunities to provide input into the development of plans and to comment on the performance of assisted activities. The public will be advised of the availability of the Public Participation Plan and any amendments to the Plan and is invited to provide comments. Comments may be sent in writing to the Housing Program Specialist within the Department of Community Development. A notice will be placed in the Ashland News and on the City Website (**www.ashland.or.us**) providing 30 days for the public to comment on the Plan. A copy of the Public Participation Plan may be obtained at the Community Development office at 51 Windburn Way, the City Administrator's office at 20 East Main or by calling 541-488-5305. TTY phone number 1-800-735-2900.

**The Consolidated Plan (and Amendments)**

The City of Ashland Consolidated Plan is a long-range strategic plan that assesses community needs, establishes priority objectives and outlines strategies the City will pursue over a 5-year period to improve the City's housing and community development assets principally benefiting low- and moderate-income persons. The public will be advised of the availability of the Consolidated Plan and amendments to the Plan and are invited to provide comments. Comments may be sent in writing to the Housing Program Specialist within the Department of Community Development at 51 Winburn Way or by email to **linda.reid@ashland.or.us**. A notice will be placed in the Ashland News providing 30 days for the public to comment. A copy of the Consolidated Plan may be obtained at the Community Development Office or by calling (541)-552-2043. Copies can be accessed at the City's website: **www.ashland.or.us** within the "Document Center", listed under "Affordable Housing Documents".

**Annual Action Plans (and Amendments)**

Each year between February and May the City is required to prepare an Annual Action Plan for submission to HUD. The plan outlines the programs and activities the City will undertake in the coming year to implement the strategies of the Consolidated Plan. The Annual Plans also describe how the CDBG funds will be used over the course of the year. The public will be advised of the availability of the draft Annual Plan and amendments to the Plan and are invited to provide comments. Comments may be sent in writing to the Housing Program Specialist within the Department of Community Development at 51 Winburn Way or by email to **linda.reid@ashland.or.us**. A notice will be placed in the Ashland News providing 30 days for the public to comment. A copy of the Annual Action Plan may be obtained at the Community Development Office (51 Winburn Way), at the City's website: **www.ashland.or.us** within the "Document Center", listed under CDBG Documents, or by calling (541)-552-2043.

**Annual Performance Reports**

Each year in July or August, the City prepares a description of how the CDBG funds were used over the past program year and describes progress on other non-funded activities of the Consolidated Plan. The public will be advised of the availability of the draft Consolidated Annual Evaluation Performance Report (CAPER) and are invited to provide comments. A notice will be placed in the Ashland News providing 15 days for the public to comment. A copy of the CAPER may be obtained at the Community Development Office (51 Winburn Way), at the City's website: **www.ashland.or.us/CDBG** within the "Document Center", listed under CDBG, or by calling (541)-552-2043.

**Amendments**

Amendments to the Consolidated Plan or Annual Action plans may be necessary as conditions change. Amendments of a minor nature will be made as needed throughout the year. However, the public will be given an opportunity to comment on all substantial amendments to the plans following the process described above.

A "substantial" amendment to the Consolidated/Annual Plan is defined as:

- Projects with budgets of $25,000 or more-An increase or decrease of more than 25% of the budgeted amount (unless the decrease is caused by a budget under run)
- Projects with budgets of less than $25,000-An increase or decrease of more than 50% of the budgeted amount (unless the decrease is caused by a budget under run)
- A 25% reduction in the number of residential units to be provided.
- A 25% increase in the number of units provided for projects of five or more units.
- A change in the use of funds from one activity to another.
- A change of location for a project with no other changes in scope does not constitute a substantial amendment.
- A change between affordable rental housing and affordable ownership housing does not constitute a substantial amendment.

**Access to Information and Availability of Plan Documents**

The City will provide reasonable and timely access to citizens, public agencies and other interested parties of records and information on the Consolidated Plan (and previous Consolidated Plan documents) and the City's use of the funds under the programs covered by the Plan. In addition, the City will provide information to the public during the planning process on proposed activities, the amount of assistance available, the range of activities that may be undertaken and estimates of the amount of funds that will benefit low- and moderate-income persons. Copies of the adopted Consolidated Plan and the Consolidated Annual Performance Evaluation Report are available upon request. Copies of the documents are available at Community Development Office (51 Winburn Way) or can be downloaded from the City's website: www.ashland.or.us/CDBG within the "Document Center", listed under CDBG, or by calling (541)-552-2043.

During the development of the Consolidated Plan, City staff elicited citizen participation through a variety of activities. The primary outreach tool utilized was a questionnaire that was posted on the City's website. Advertisements for the questionnaire were sent out through the City's Facebook and twitter pages, as well as through a legal notice in the local newspaper. The City also conducted direct email consultation with agencies and service providers. The City held two public hearings to provide further opportunities for public participation and feedback on the development of the plan. The first Public Hearing was held before the Housing and Human Services Advisory Committee at their regular meeting on March 26, 2020. The second public hearing was held before the City Council at their regular meeting on April 21, 2020.

## 5. Summary of public comments

TBD

## 6. Summary of comments or views not accepted and the reasons for not accepting them

Not Applicable

## 7. Summary

TBD

# The Process

## PR-05 Lead & Responsible Agencies 24 CFR 91.200(b)

### 1. Describe agency/entity responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source

The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

| Agency Role | Name | Department/Agency |
|---|---|---|
| | | |
| CDBG Administrator | | Community Development/Housing Division |

**Table 1 – Responsible Agencies**

### Narrative

The Community Development Department/Housing Division is responsible for overseeing the City of Ashland's CDBG program and maintaining compliance with HUD regulations concerning that program. Staff annually issue the Request for Proposals for the use of the CDBG funds, and, with the City of Ashland's Housing and Human Services Advisory Committee, review applications and make funding recommendations to the City Council.

Community Development/Housing Division Staff and the Housing and Human Services Advisory Committee are responsible for the preparation and development of the 2015-2019 Consolidated Plan. The City of Ashland Housing Program Specialist, the Director of the Community Development Department, the City Administrator, the Mayor, and the Ashland City Council have the responsibility of approving the Consolidated Plan and for administration of the programs covered by the Consolidated Plan. Though the City's Housing Program Specialist is tasked with the primary administrative responsibility of the CDBG program, only the City Administrator, the Mayor and the City Council have the authority to authorize grant awards and execute HUD required documents and agreements.

### Consolidated Plan Public Contact Information

City of Ashland contact for the Consolidated Plan and the CDBG Program,

Linda Reid, Housing Program Manager

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(541) 552-2043 (phone); (541) 552-2050 (fax)

reidl@ashland.or.us

## PR-10 Consultation – 91.100, 91.110, 91.200(b), 91.300(b), 91.215(l) and 91.315(l)

### 1. Introduction

The City of Ashland undertakes several activities to enhance coordination between the City, housing providers, health providers, and social service agencies.

**Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(l)).**

City staff actively participate in several regional groups, including the Jackson County Homeless Task Force, and the Jackson County Continuum of Care, the coordinating body of the HUD Continuum of Care Program. City staff also participate in intermittent groups, committees, and commissions as needed, for example, City staff often serve on project specific housing and community education planning committees, and the Point in Time planning subcommittee. Similarly, City Housing Program staff maintains good working relationships and communication with all local providers of affordable and assisted housing and services both inside the City and within the County.

**Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness**

The City of Ashland has been an active member of the Jackson County Homeless Task Force, when that body managed the Continuum of Care program, then on the Jackson County Continuum of Care Board, once that body was established and designated as the County's Continuum of Care. The Jackson County Continuum of Care (CoC) is a HUD-mandated, community-wide effort to end homelessness by providing stable housing for those experiencing homelessness and offering preventative services to those at risk of becoming homeless. The Jackson County CoC seeks to end homelessness in Jackson County through the collaborative efforts and resources of all sectors of our community. Since 2008, City of Ashland staff and elected officials have served on several committees and subcommittees including the Core group, which was the subcommittee that issues the request for proposals and coordinates the application and administration of the Continue of Care grants for Jackson County prior to the formation of the Jackson County Continuum of Care Board. City staff has also been a part of the Rating and Ranking subcommittee in several grant cycles, as well as having helped draft the coordinated application. In the last two years the governing structure of the Counties Continuum of Care in Jackson County has undergone a complete transformation. A new charter was created and adopted and a new process for electing board members was established. The CoC board is undertaking several activities to address deficiencies in the data collection, coordinated entry, and data input into the Homelessness



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Management Information System to better understand and plan for addressing the needs of homeless population throughout Jackson County. The City is working in partnership with the CoC board to address the identified needs. Similarly, Housing Program Specialist continues to be active with the Jackson County Homeless Task Force and the Jackson County Continuum of Care, which coordinates the efforts of city and county governments, social service agencies, federal agencies, and non-profit organizations to address affordable housing and homeless issues on a regional level.

City staff coordinate with the agencies and individual members of both the Jackson County Continuum of Care (CoC) and the Jackson County Homeless Task Force, a working group of the CoC, to implement the actions identified by the recently adopted strategic plan. City staff also coordinates with county partners to plan and implement community education events. These events seek to highlight the need for affordable housing and resources to address complex situations, and to share with community members the work that is being done in the community to support homeless and at-risk populations navigate systems and connect with available needed resources

**Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards and evaluate outcomes, and develop funding, policies and procedures for the administration of HMIS**

The City does not receive a direct allocation of ESG funds, however, Access, the County's Community Action Agency does receive ESG funding from the State to distribute to organizations undertaking eligible activities. The City has representation on the Jackson County Continuum of Care board which coordinates actions to address the issues of homelessness throughout the valley, which often includes the use of Federal and State resources to address identified needs. Similarly, the CoC board has developed performance standards and has standing workgroups to evaluate outcomes, develop policies and procedures and oversee the administration of the HMIS system, and to develop additional resources, which may include funding, to help address identified needs

**2. Describe Agencies, groups, organizations and others who participated in the process and describe the jurisdictions consultations with housing, social service agencies and other entities**

The City conducted outreach activities to several housing and social service agencies through direct email contact, outreach at public meetings, as well as social media, and print media.

| Agency/Group/Organization | Agency/Group/Organization Type | What section of the Plan was addressed by | How was the Agency/Group/Organization consulted and what are the anticipated outcomes |
|---|---|---|---|
| | | | |
| | | | |

**Table 2 – Agencies, groups, organizations who participated**

### Identify any Agency Types not consulted and provide rationale for not consulting

Not Applicable

### Other local/regional/state/federal planning efforts considered when preparing the Plan

| Name of Plan | Lead Organization | How do the goals of your Strategic Plan overlap with the goals of each plan? |
|---|---|---|
| Continuum of Care Strategic Plan | Access | Prioritization of housing and services that serve homeless populations |
| Housing Capacity Analysis | City of Ashland | Develop a broad range of housing types affordable to lower and moderate-income households |
| 2020 Analysis of Impediments to Fair Housing Choice | City of Ashland | Encourage diversity |
| Housing Production Strategy | City of Ashland | Strategies and Actions to support the development and retention of needed housing types. |
| City of Ashland Economic Development Strategy | City of Ashland | Promoting a diverse economy, support job creation, micro-enterprise |
| | | |

**Table 3 – Other local / regional / federal planning efforts**

### Describe cooperation and coordination with other public entities, including the State and any adjacent units of general local government, in the implementation of the Consolidated Plan (91.215(l))

### Narrative (optional):

During the process of developing the Consolidated Plan Housing Program Staff conducted consultations with citizens, beneficiaries and key stakeholders, as well as elected and appointed officials and community members regarding community resources, community needs, and barriers to meeting those needs. A notice was run in the local publication for the Ashland area inviting citizens to participate in the

citizen participation process and to voice their opinions and concerns at one of the three public hearings. Similarly, a notice was run on the City of Ashland website. And lastly, the City completed outreach efforts including direct email contacts and announcements at public meetings to solicit input.

## PR-15 Citizen Participation – 91.105, 91.115, 91.200(c) and 91.300(c)

### 1. Summary of citizen participation process/Efforts made to broaden citizen participation

**Summarize citizen participation process and how it impacted goal-setting**

During the development of the Consolidated Plan, City staff elicited citizen participation through a variety of activities. The primary outreach tools utilized were questionnaires provided at community events. The City also conducted direct email consultation with agencies and service providers. The City held two public hearings to provide further opportunities for public participation and feedback on the development of the plan. The first Public Hearing was held before the Housing and Human Services Advisory Committee at their regular meeting on March 27, 2025. The second public hearing will be held before the City Council at their regular meeting on April 15, 2025.

Citizens were encouraged to provide written comments either handwritten or electronically on the draft plan from March 20th, 2025, through April 25th 2025.

## Citizen Participation Outreach

| Mode of Outreach | Target of Outreach | Summary of response/attendance | Summary of comments received | Summary of comments not accepted and reasons |
|---|---|---|---|---|
| Public Hearing-Housing and Human Services Commission | Beneficiaries | Five guests were in attendance at the virtual meeting. The comment that was submitted was received via email. | The City received one comment during the public hearing process. The comment submitted came from Rogue Valley Council of Government's Senior and Disabled Services which was recommending the inclusion of language regarding lifelong housing, housing that promotes aging in place into the plan. | None |
| Public Hearing-City Council | Beneficiaries | | | None |
| Questionnaire | Agencies | E-mail cover letter and link to the questionnaire sent to list in Table 2. | Comments received are in aggregate with agency data and citizen data | None |
| Questionnaire | Non-targeted/broad community | At public engagement events | | None |

**Table 4 – Citizen Participation Outreach**

A total of two public hearings were held during the 2025-2029 Consolidated Planning Process.

The first public hearing was held on **March 27, 2025**, before the City of Ashland Housing and Human Services Advisory Committee. The purpose of the initial public hearing is to provide a summary of the draft plan and to encourage public comments on the draft plan. The hearing was noticed in the legal section of the *Ashland News*.

The second public hearing will be held on **April 25, 2025,** before the Ashland City Council. The purpose of this meeting was to accept comments on the draft plan before final approval by the City Council.

The meetings were noticed in the legal section of the *Ashland News online newspaper* prior to the meetings to alert the public of the availability of the draft plan and to encourage public comments. The hearings were also noticed on the City's website. Lastly, the Housing Authority of Jackson County was provided notice of the comment period and public hearing in order to encourage the participation of City of Ashland residents receiving section 8/Housing Choice Voucher Program (rental assistance) and those who reside in publicly funded housing units.

# Needs Assessment

## NA-05 Overview

### Needs Assessment Overview

Housing Needs

Affordable housing refers to a household's ability to find housing within their financial means. The standard measure of affordability as defined by the U.S. Department of Housing and Urban Development (HUD) is when the cost of rent and utilities (gross rent) is less than 30% of household income. When gross rent levels exceed 30% of income, particularly by a large percentage, it places a significant burden on household finances. Householders who pay more than 30% of their income toward housing costs are called "cost burdened". Householders who pay more than 50% of their income toward housing costs are called "severely cost burdened". When households are housing "cost burdened" their ability to pay for the other necessities of life are compromised.

As the data in the following tables demonstrate, the greatest housing need in Ashland is for housing affordable to both renters and owners. Census and HUD Comprehensive Housing Affordability Strategy (CHAS) data as well as data collected by Oregon Housing and Community Services demonstrate that housing cost burden (paying more than 30% of income for housing costs) and severe housing cost burden (paying more than 50%) are the City's most frequent and significant housing problems. Although households in all income ranges experience housing cost burden, the problem becomes increasingly more severe when looking at households with very low and extremely low incomes. Households with incomes at the lowest levels, less than 30% AMI, who are housing choice voucher recipients have a difficult time finding rental housing in Ashland that rents for a price that is within the limits of the program in relation to their income.

Less evident in the data provided in the following tables, is the growing need for "middle income" housing, or those households earning above 60-80% of the Area Median Income, but who still cannot afford current market rate rents. This growing segment of the population earns too much to qualify for affordable housing developed through traditional funding sources. Current housing market conditions are quickly outpacing middle income households and there are currently no large-scale funding programs to subsidize housing development targeted to households at this income level. The City of Ashland's Affordable Housing Trust fund, and the City of Ashland Affordable Housing program both have resources to support development at this level. However, both programs are small-scale and are not able to develop the number of homes needed without the inclusion of outside funding sources.

Data in the following tables are experiencing Ashland has relatively few housing units (less than 25%) which would be considered substandard or having severe housing problems such as lack of plumbing



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and kitchen facilities or who experiencing overcrowding. Similarly, relatively few housing units within Ashland are considered unsafe or may have the potential to contain lead-based paint (See table 34 on pg. 56).

The most prevalent housing problem identified in the CHAS tables is housing cost burden. Approximately, 1,310 renters in Ashland Experience severe housing cost burden, while 685 homeowners experience severe housing cost burden.

Public Housing

The Housing Authority of Jackson County (HAJC) is the public housing authority that serves Jackson County. HAJC neither owns nor operates public housing units, so the Consolidated Plan narrative requirements related to public housing are not applicable to the City of Ashland. HAJC does however administer the Housing Choice Voucher program, which provides rental subsidies to qualifying low-income families in Jackson County.

Homeless Needs

According to data gathered by the Jackson County Continuum of Care during the annual point-in-time homeless count there were a total of 941 homeless persons in Jackson County on January 23, 2023. For a detailed summary of homeless populations by household type, and subpopulation see table 5 below. Issues identified by the point in time count, citizens and providers of services to homeless populations include a need for low-cost rental housing, treatment for mental illness, and/or drug and alcohol addiction (dual diagnosis) as well as barrier removal, life skills and employment skills training. These issues are especially prevalent in Ashland; as a smaller rural community Ashland has many housing market constraints, (which are expounded upon elsewhere in this document) that contributes to a lack of rental housing affordable to populations with the lowest incomes, as well as limited access some critical services such as mental health and drug and alcohol treatment services, which are primarily located in Medford, a neighboring City nineteen miles to the North of Ashland

# NA-10 Housing Needs Assessment - 24 CFR 91.205 (a,b,c)

## Summary of Housing Needs

| Demographics | Base Year: 2009 | Most Recent Year: 2017 | % Change |
|---|---|---|---|
| Population | 20,949 | 20,735 | -1% |
| Households | 9,650 | 9,720 | 1% |
| Median Income | $38,436.00 | $50,517.00 | 31% |

**Table 5 - Housing Needs Assessment Demographics**

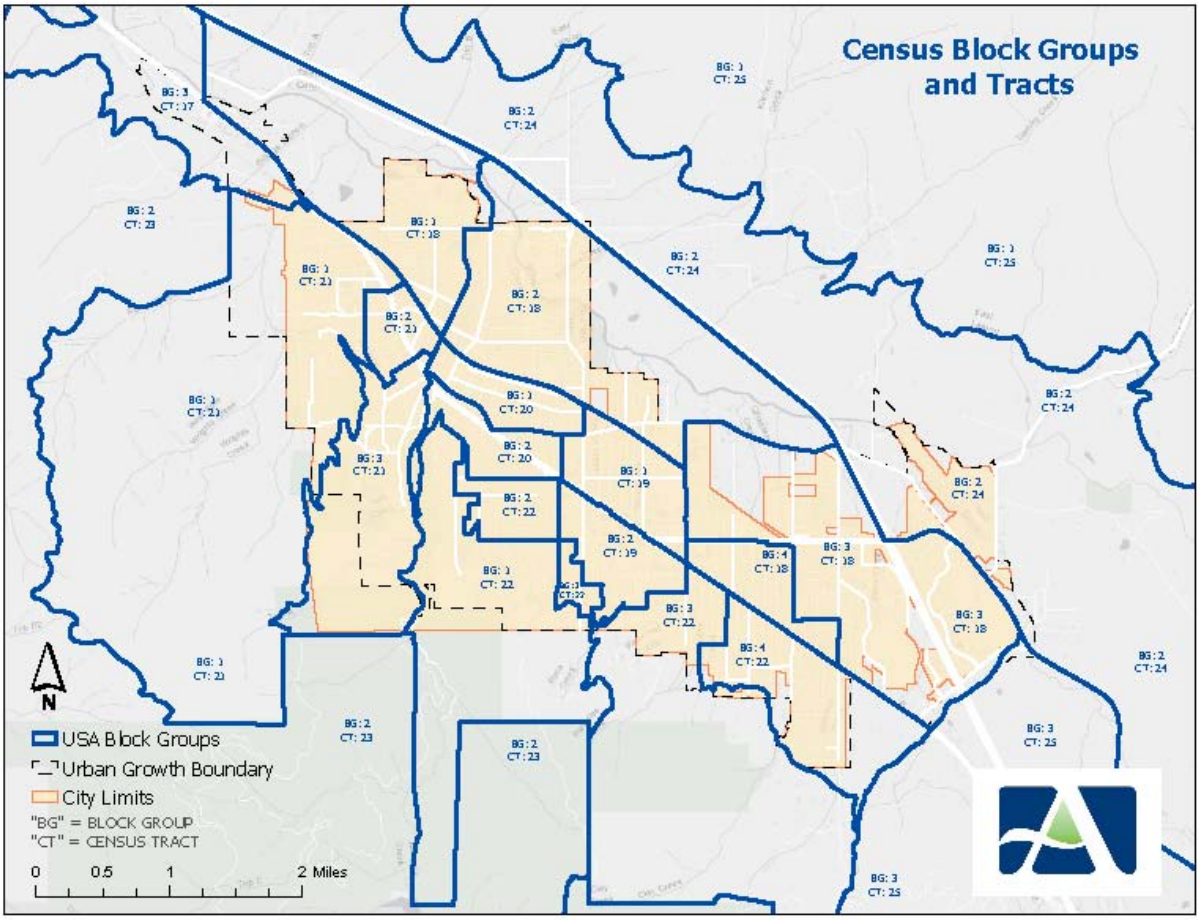
**Data Source:** 2000 Census (Base Year), 2013-2017 ACS (Most Recent Year)

## Number of Households Table

| | 0-30% HAMFI | >30-50% HAMFI | >50-80% HAMFI | >80-100% HAMFI | >100% HAMFI |
|---|---|---|---|---|---|
| Total Households | 1,375 | 1,015 | 1,375 | 660 | 5,290 |
| Small Family Households | 365 | 150 | 465 | 150 | 1,775 |
| Large Family Households | 10 | 4 | 35 | 0 | 105 |
| Household contains at least one person 62-74 years of age | 270 | 310 | 230 | 210 | 1,910 |
| Household contains at least one person age 75 or older | 58 | 210 | 190 | 115 | 755 |
| Households with one or more children 6 years old or younger | 210 | 35 | 120 | 85 | 395 |

**Table 6 - Total Households Table**

**Data Source:** 2013-2017 CHAS



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**Housing Needs Summary Tables**

1. Housing Problems (Households with one of the listed needs)

| | Renter | | | | | Owner | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | **0-30% AMI** | **>30-50% AMI** | **>50-80% AMI** | **>80-100% AMI** | **Total** | **0-30% AMI** | **>30-50% AMI** | **>50-80% AMI** | **>80-100% AMI** | **Total** |
| NUMBER OF HOUSEHOLDS | | | | | | | | | | |
| Substandard Housing - Lacking complete plumbing or kitchen facilities | 35 | 15 | 90 | 0 | 140 | 0 | 0 | 0 | 0 | 0 |
| Severely Overcrowded - With >1.51 people per room (and complete kitchen and plumbing) | 10 | 25 | 0 | 0 | 35 | 0 | 0 | 0 | 0 | 0 |
| Overcrowded - With 1.01-1.5 people per room (and none of the above problems) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Housing cost burden greater than 50% of income (and none of the above problems) | 750 | 305 | 235 | 20 | 1,310 | 235 | 230 | 185 | 35 | 685 |



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| | Renter | | | | | Owner | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 0-30% AMI | >30-50% AMI | >50-80% AMI | >80-100% AMI | Total | 0-30% AMI | >30-50% AMI | >50-80% AMI | >80-100% AMI | Total |
| Housing cost burden greater than 30% of income (and none of the above problems) | 35 | 150 | 430 | 220 | 835 | 25 | 105 | 50 | 140 | 320 |
| Zero/negative Income (and none of the above problems) | 85 | 0 | 0 | 0 | 85 | 140 | 0 | 0 | 0 | 140 |

**Table 7 – Housing Problems Table**

**Data Source:** 2013-2017 CHAS

2. Housing Problems 2 (Households with one or more Severe Housing Problems: Lacks kitchen or complete plumbing, severe overcrowding, severe cost burden)

| | Renter | | | | | Owner | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 0-30% AMI | >30-50% AMI | >50-80% AMI | >80-100% AMI | Total | 0-30% AMI | >30-50% AMI | >50-80% AMI | >80-100% AMI | Total |
| NUMBER OF HOUSEHOLDS | | | | | | | | | | |
| Having 1 or more of four housing problems | 795 | 345 | 320 | 20 | 1,480 | 235 | 230 | 185 | 35 | 685 |
| Having none of four housing problems | 60 | 290 | 630 | 325 | 1,305 | 60 | 150 | 240 | 285 | 735 |
| Household has negative income, but none of the other housing problems | 85 | 0 | 0 | 0 | 85 | 140 | 0 | 0 | 0 | 140 |

**Table 8 – Housing Problems 2**

**Data Source:** 2013-2017 CHAS

3. Cost Burden > 30%

| | Renter | | | | Owner | | | |
|---|---|---|---|---|---|---|---|---|
| | 0-30% AMI | >30-50% AMI | >50-80% AMI | Total | 0-30% AMI | >30-50% AMI | >50-80% AMI | Total |
| NUMBER OF HOUSEHOLDS | | | | | | | | |
| Small Related | 260 | 75 | 255 | 590 | 30 | 30 | 40 | 100 |
| Large Related | 10 | 4 | 10 | 24 | 0 | 0 | 10 | 10 |
| Elderly | 130 | 170 | 145 | 445 | 104 | 244 | 134 | 482 |
| Other | 430 | 245 | 340 | 1,015 | 120 | 65 | 50 | 235 |
| Total need by income | 830 | 494 | 750 | 2,074 | 254 | 339 | 234 | 827 |

**Table 9 – Cost Burden > 30%**

**Data Source:** 2013-2017 CHAS

4. Cost Burden > 50%

| | Renter | | | | Owner | | | |
|---|---|---|---|---|---|---|---|---|
| | 0-30% AMI | >30-50% AMI | >50-80% AMI | Total | 0-30% AMI | >30-50% AMI | >50-80% AMI | Total |
| NUMBER OF HOUSEHOLDS | | | | | | | | |
| Small Related | 225 | 45 | 155 | 425 | 30 | 20 | 20 | 70 |
| Large Related | 10 | 4 | 10 | 24 | 0 | 0 | 10 | 10 |
| Elderly | 130 | 105 | 30 | 265 | 100 | 160 | 130 | 390 |
| Other | 430 | 160 | 60 | 650 | 105 | 55 | 25 | 185 |
| Total need by income | 795 | 314 | 255 | 1,364 | 235 | 235 | 185 | 655 |

**Table 10 – Cost Burden > 50%**

**Data Source:** 2013-2017 CHAS

5. Crowding (More than one person per room)

| | Renter | | | | | Owner | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 0-30% AMI | >30-50% AMI | >50-80% AMI | >80-100% AMI | Total | 0-30% AMI | >30-50% AMI | >50-80% AMI | >80-100% AMI | Total |
| NUMBER OF HOUSEHOLDS | | | | | | | | | | |
| Single family households | 10 | 25 | 0 | 0 | 35 | 0 | 0 | 0 | 0 | 0 |

| | Renter | | | | | Owner | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 0-30% AMI | >30-50% AMI | >50-80% AMI | >80-100% AMI | Total | 0-30% AMI | >30-50% AMI | >50-80% AMI | >80-100% AMI | Total |
| Multiple, unrelated family households | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Other, non-family households | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total need by income | 10 | 25 | 0 | 0 | 35 | 0 | 0 | 0 | 0 | 0 |

**Table 11 – Crowding Information – 1/2**

**Data Source:** 2013-2017 CHAS

| | Renter | | | | Owner | | | |
|---|---|---|---|---|---|---|---|---|
| | 0-30% AMI | >30-50% AMI | >50-80% AMI | Total | 0-30% AMI | >30-50% AMI | >50-80% AMI | Total |
| Households with Children Present | | | | | | | | |

**Table 12 – Crowding Information – 2/2**

### Describe the number and type of single-person households in need of housing assistance.

According to CHAS Data there are 3,765 households below 80% of Area Median Income in Ashland. CHAS data also identified that there are 2,074 renter households and 827 owner households that experience cost burden. These numbers are down from the previous five-year period.

### Estimate the number and type of families in need of housing assistance who are disabled or victims of domestic violence, dating violence, sexual assault and stalking.

Census data estimates that there are 3,104 family households in Ashland. American Community Survey Data estimates that there are 981 individuals who experience hearing difficulties, 434 individuals who experience visual difficulties, and 795 individuals experience cognitive difficulties. Furthermore, 986 individuals experience ambulatory difficulty, 368 experience difficulty with self-care, and 900 report difficulty with independent living. However, data that identifies both family type and disability are not available.

Community Works is the community's sole provider of services to victims of domestic and dating violence. The City has provided Social Service grant funding to Community Works to help support the work they do throughout the community. From 2022-2024 Community Works provided shelter to 471

individuals experiencing domestic violence, 46 of those were identified as residents of Ashland. In that same time period Community Works served 606 victims of sexual assault, 35 of those individuals identified as Ashland residents. Additionally, Community Works provided advocacy, emotional support, resources to 3,394 adults and children and 215 were from Ashland.

### What are the most common housing problems?

Oregon Housing and Community Services identified that 31% or 1,230 renter households in Ashland experience severe cost burden. CHAS data identifies that 827 owner households earning 80% of the Area Median Income also experience severe cost burden. Cost burden is the most prevalent and pressing housing problem in the City of Ashland.

### Are any populations/household types more affected than others by these problems?

The populations/household types which are most affected by housing cost burden and housing problems are those households with the lowest incomes, which often includes peoples with fixed or limited incomes such as seniors and peoples with disabilities and/or peoples experiencing mental illness, and large families with children. Extremely Low-Income Households experience cost burden at greater levels than other income groups. Renter households also experience a greater cost burden than ownership households.

These problems are not shared disproportionately with any racial or ethnic minority group, except Native American/Alaska Natives who disproportionately experience housing cost burden. Similarly, single family households and “other” households appear to be most affected by cost burden and housing problems, with those households with the lowest incomes experiencing the most cost burden and housing problems.

### Describe the characteristics and needs of Low-income individuals and families with children (especially extremely low-income) who are currently housed but are at imminent risk of either residing in shelters or becoming unsheltered 91.205(c)/91.305(c)). Also discuss the needs of formerly homeless families and individuals who are receiving rapid re-housing assistance and are nearing the termination of that assistance

It is hard to infer from the little evidence on these populations that the City has been able to collect and from census data the full extent of a household’s risk of becoming homeless or the characteristics of those individuals and families. But from reports submitted by grantees that serve homeless and at-risk populations, and from data presented throughout this document from a variety of sources, the City can deduce the following: Households with the lowest incomes (30% of the AMI or less) are at the greatest risk for losing housing as well as households experiencing extreme cost burden (paying 50% or more of their income toward rent), or who have difficulties paying utility costs. Households with fixed incomes, such as people with disabling conditions and seniors, are more at risk for losing housing, as well as people who experiencing unplanned events or family emergencies. Households that are

both low income and which have members who experience either mental illness, physical illness and or/substance abuse are also at risk for housing instability. Further, households that are transitioning from chronic or long-term homelessness are also vulnerable to continued housing instability.

Families and individuals who were formerly homeless and are receiving assistance through a rapid rehousing program that is set to terminate soon, will still have access services and case management even after exit from a rapid rehousing program. However, many recipients are concerned about what will happen once the financial assistance ceases. Many are preparing to become homeless again, because they cannot afford to maintain the housing once the grant assistance ends. Many needs continued and ongoing rental assistance and support to afford the cost of living in general, at least until they can secure permanent affordable housing most likely through a voucher program. Voucher assistance is still often the only option that a low-income, fixed income, or person experiencing a physical or mental disability, for maintaining affordable housing, and consequently, housing stability.

### If a jurisdiction provides estimates of the at-risk population(s), it should also include a description of the operational definition of the at-risk group and the methodology used to generate the estimates:

The City of Ashland does not receive or provide estimates of the number of households who are considered at risk of homelessness. When that term is used throughout this document it is used to mean households who are vulnerable to housing instability for a number of reasons including having an income below 80% of AMI, belonging to a presumed benefit category such as being frail, elderly, or disabled, having a diagnosis of mental illness, having been a victim of domestic violence, having or living in a household that experiences drug and/or alcohol addiction or having had a history of chronic homelessness. These circumstances alone or in any combination can lead to housing instability and therefore are considered for the purposes of this plan to be circumstances which can contribute to a household's vulnerability to housing instability and potential homelessness.

### Specify particular housing characteristics that have been linked with instability and an increased risk of homelessness

The housing characteristic that has been most linked with housing instability and increased risk for homelessness is housing cost burden. A family's or individual's ability to maintain a stable living situation is directly linked to their ability to afford that housing and while also maintaining other necessities such as food, transportation, and medications, and/or emergency costs as they arise. As can be seen in tables NA-15, NA-25, and NA-30 all housing issues including housing cost burden, and severe housing problems are disproportionately impacting those households with the lowest incomes.

### Discussion

## NA-15 Disproportionately Greater Need: Housing Problems – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

### Introduction

### 0%-30% of Area Median Income

| Housing Problems | Has one or more of four housing problems | Has none of the four housing problems | Household has no/negative income, but none of the other housing problems |
|---|---|---|---|
| Jurisdiction as a whole | 1,085 | 65 | 225 |
| White | 960 | 65 | 190 |
| Black / African American | 30 | 0 | 0 |
| Asian | 0 | 0 | 0 |
| American Indian, Alaska Native | 0 | 0 | 0 |
| Pacific Islander | 0 | 0 | 0 |
| Hispanic | 50 | 0 | 35 |

**Table 13 - Disproportionally Greater Need 0 - 30% AMI**

**Data Source:** 2013-2017 CHAS

*The four housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

### 30%-50% of Area Median Income

| Housing Problems | Has one or more of four housing problems | Has none of the four housing problems | Household has no/negative income, but none of the other housing problems |
|---|---|---|---|
| Jurisdiction as a whole | 830 | 185 | 0 |
| White | 775 | 170 | 0 |
| Black / African American | 0 | 0 | 0 |
| Asian | 15 | 0 | 0 |
| American Indian, Alaska Native | 0 | 0 | 0 |
| Pacific Islander | 0 | 0 | 0 |
| Hispanic | 4 | 15 | 0 |

**Table 14 - Disproportionally Greater Need 30 - 50% AMI**

**Data Source:** 2013-2017 CHAS

*The four housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

### 50%-80% of Area Median Income

| Housing Problems | Has one or more of four housing problems | Has none of the four housing problems | Household has no/negative income, but none of the other housing problems |
|---|---|---|---|
| Jurisdiction as a whole | 985 | 390 | 0 |
| White | 835 | 315 | 0 |
| Black / African American | 50 | 0 | 0 |
| Asian | 25 | 0 | 0 |
| American Indian, Alaska Native | 15 | 0 | 0 |
| Pacific Islander | 0 | 0 | 0 |
| Hispanic | 60 | 70 | 0 |

**Table 15 - Disproportionally Greater Need 50 - 80% AMI**

**Data Source:** 2013-2017 CHAS

*The four housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4.Cost Burden greater than 30%

### 80%-100% of Area Median Income

| Housing Problems | Has one or more of four housing problems | Has none of the four housing problems | Household has no/negative income, but none of the other housing problems |
|---|---|---|---|
| Jurisdiction as a whole | 410 | 250 | 0 |
| White | 370 | 250 | 0 |
| Black / African American | 0 | 0 | 0 |
| Asian | 15 | 0 | 0 |
| American Indian, Alaska Native | 0 | 0 | 0 |
| Pacific Islander | 0 | 0 | 0 |
| Hispanic | 10 | 0 | 0 |

**Table 16 - Disproportionally Greater Need 80 - 100% AMI**

**Data Source:** 2013-2017 CHAS

*The four housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

**Discussion**

## NA-20 Disproportionately Greater Need: Severe Housing Problems – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

### Introduction

### 0%-30% of Area Median Income

| Severe Housing Problems* | Has one or more of four housing problems | Has none of the four housing problems | Household has no/negative income, but none of the other housing problems |
|---|---|---|---|
| Jurisdiction as a whole | 1,030 | 120 | 225 |
| White | 935 | 85 | 190 |
| Black / African American | 30 | 0 | 0 |
| Asian | 0 | 0 | 0 |
| American Indian, Alaska Native | 0 | 0 | 0 |
| Pacific Islander | 0 | 0 | 0 |
| Hispanic | 50 | 0 | 35 |

**Table 17 – Severe Housing Problems 0 - 30% AMI**

**Data Source:** 2013-2017 CHAS

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

### 30%-50% of Area Median Income

| Severe Housing Problems* | Has one or more of four housing problems | Has none of the four housing problems | Household has no/negative income, but none of the other housing problems |
|---|---|---|---|
| Jurisdiction as a whole | 575 | 440 | 0 |
| White | 540 | 405 | 0 |
| Black / African American | 0 | 0 | 0 |
| Asian | 0 | 15 | 0 |
| American Indian, Alaska Native | 0 | 0 | 0 |
| Pacific Islander | 0 | 0 | 0 |
| Hispanic | 4 | 15 | 0 |

**Table 18 – Severe Housing Problems 30 - 50% AMI**

**Data Source:** 2013-2017 CHAS

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

### 50%-80% of Area Median Income

| Severe Housing Problems* | Has one or more of four housing problems | Has none of the four housing problems | Household has no/negative income, but none of the other housing problems |
|---|---|---|---|
| Jurisdiction as a whole | 505 | 870 | 0 |
| White | 420 | 720 | 0 |
| Black / African American | 0 | 50 | 0 |
| Asian | 25 | 0 | 0 |
| American Indian, Alaska Native | 4 | 10 | 0 |
| Pacific Islander | 0 | 0 | 0 |
| Hispanic | 55 | 80 | 0 |

**Table 19 – Severe Housing Problems 50 - 80% AMI**

**Data Source:** 2013-2017 CHAS

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

### 80%-100% of Area Median Income

| Severe Housing Problems* | Has one or more of four housing problems | Has none of the four housing problems | Household has no/negative income, but none of the other housing problems |
|---|---|---|---|
| Jurisdiction as a whole | 55 | 610 | 0 |
| White | 45 | 585 | 0 |
| Black / African American | 0 | 0 | 0 |
| Asian | 0 | 15 | 0 |
| American Indian, Alaska Native | 0 | 0 | 0 |
| Pacific Islander | 0 | 0 | 0 |
| Hispanic | 0 | 10 | 0 |

**Table 20 – Severe Housing Problems 80 - 100% AMI**

**Data Source:** 2013-2017 CHAS

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

## Discussion

## NA-25 Disproportionately Greater Need: Housing Cost Burdens – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

### Introduction:

### Housing Cost Burden

| Housing Cost Burden | <=30% | 30-50% | >50% | No / negative income (not computed) |
|---|---|---|---|---|
| Jurisdiction as a whole | 5,410 | 1,895 | 2,195 | 225 |
| White | 4,965 | 1,705 | 2,000 | 190 |
| Black / African American | 15 | 50 | 30 | 0 |
| Asian | 140 | 30 | 25 | 0 |
| American Indian, Alaska Native | 50 | 10 | 4 | 0 |
| Pacific Islander | 0 | 0 | 0 | 0 |
| Hispanic | 190 | 60 | 65 | 35 |

**Table 21 – Greater Need: Housing Cost Burdens AMI**

**Data Source:** 2013-2017 CHAS

### Discussion:

## NA-30 Disproportionately Greater Need: Discussion – 91.205(b)(2)

**Are there any Income categories in which a racial or ethnic group has disproportionately greater need than the needs of that income category as a whole?**

No income category or racial or ethnic group has disproportionately greater need than the needs of that income category as a whole.

**If they have needs not identified above, what are those needs?**

Not Applicable.

**Are any of those racial or ethnic groups located in specific areas or neighborhoods in your community?**

No, none of the racial or ethnic groups are located in specific areas in the community.

# NA-35 Public Housing – 91.205(b)

## Introduction

### Totals in Use

| Program Type | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Certificate | Mod-Rehab | Public Housing | Vouchers | | | | | |
| | | | | Total | Project - based | Tenant - based | Special Purpose Voucher | | |
| | | | | | | | Veterans Affairs Supportive Housing | Family Unification Program | Disabled * |
| # of units vouchers in use | 0 | 93 | 0 | 1,835 | 1 | 1,732 | 90 | 0 | 0 |

**Table 22 - Public Housing by Program Type**

***includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition**

**Data Source:** PIC (PIH Information Center)

### Characteristics of Residents

| Program Type | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Certificate | Mod-Rehab | Public Housing | Vouchers | | | | |
| | | | | Total | Project - based | Tenant - based | Special Purpose Voucher | |
| | | | | | | | Veterans Affairs Supportive Housing | Family Unification Program |
| Average Annual Income | 0 | 9,797 | 0 | 11,558 | 1,892 | 11,567 | 10,905 | 0 |
| Average length of stay | 0 | 6 | 0 | 5 | 1 | 5 | 0 | 0 |
| Average Household size | 0 | 1 | 0 | 2 | 4 | 2 | 1 | 0 |
| # Homeless at admission | 0 | 0 | 0 | 40 | 0 | 0 | 40 | 0 |



OMB Control No: 2506-0117 (exp. 09/30/2021)

| Program Type | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Certificate | Mod-Rehab | Public Housing | Vouchers | | | | |
| | | | | Total | Project - based | Tenant - based | Special Purpose Voucher | |
| | | | | | | | Veterans Affairs Supportive Housing | Family Unification Program |
| # of Elderly Program Participants (>62) | 0 | 21 | 0 | 352 | 0 | 330 | 18 | 0 |
| # of Disabled Families | 0 | 51 | 0 | 582 | 0 | 556 | 23 | 0 |
| # of Families requesting accessibility features | 0 | 93 | 0 | 1,835 | 1 | 1,732 | 90 | 0 |
| # of HIV/AIDS program participants | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| # of DV victims | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

**Table 23 – Characteristics of Public Housing Residents by Program Type**

**Data Source:** PIC (PIH Information Center)

## Race of Residents

| Program Type | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Race | Certificate | Mod-Rehab | Public Housing | Vouchers | | | | | |
| | | | | Total | Project - based | Tenant - based | Special Purpose Voucher | | |
| | | | | | | | Veterans Affairs Supportive Housing | Family Unification Program | Disabled * |
| White | 0 | 86 | 0 | 1,731 | 1 | 1,644 | 74 | 0 | 0 |
| Black/African American | 0 | 3 | 0 | 51 | 0 | 39 | 12 | 0 | 0 |
| Asian | 0 | 2 | 0 | 7 | 0 | 7 | 0 | 0 | 0 |



OMB Control No: 2506-0117 (exp. 09/30/2021)

| Program Type | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Race | Certificate | Mod-Rehab | Public Housing | Vouchers | | | | | |
| | | | | Total | Project - based | Tenant - based | Special Purpose Voucher | | |
| | | | | | | | Veterans Affairs Supportive Housing | Family Unification Program | Disabled * |
| American Indian/Alaska Native | 0 | 2 | 0 | 41 | 0 | 37 | 4 | 0 | 0 |
| Pacific Islander | 0 | 0 | 0 | 5 | 0 | 5 | 0 | 0 | 0 |
| Other | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| *includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition | | | | | | | | | |

**Table 24 – Race of Public Housing Residents by Program Type**

**Data Source:** PIC (PIH Information Center)

## Ethnicity of Residents

| Program Type | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Ethnicity | Certificate | Mod-Rehab | Public Housing | Vouchers | | | | | |
| | | | | Total | Project - based | Tenant - based | Special Purpose Voucher | | |
| | | | | | | | Veterans Affairs Supportive Housing | Family Unification Program | Disabled * |
| Hispanic | 0 | 2 | 0 | 118 | 0 | 114 | 3 | 0 | 0 |
| Not Hispanic | 0 | 91 | 0 | 1,717 | 1 | 1,618 | 87 | 0 | 0 |
| *includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition | | | | | | | | | |

**Table 25 – Ethnicity of Public Housing Residents by Program Type**

**Data Source:** PIC (PIH Information Center)



OMB Control No: 2506-0117 (exp. 09/30/2021)

**Section 504 Needs Assessment: Describe the needs of public housing tenants and applicants on the waiting list for accessible units:** According to the Housing Authority of Jackson County's Tenant Statistical Report there are 292 households currently receiving section 8 assistance, 43% are elderly, 52% experience a disability. There are no public housing units within the City of Ashland. The report from the Housing Authority of Jackson County does not provide demographic information on tenants residing in project based voucher units owned or managed by other housing providers. Those numbers will be reflected in the tables above; however, those tables also include tenants covered by the Housing Authority's report for additional programs.

### Most immediate needs of residents of Public Housing and Housing Choice voucher holders

The Section 8 waitlist currently has 380 households on the waitlist in Ashland. Of the 380 households on the waitlist, 23% are elderly and 46% are disabled. The households on the Section 8 waitlist share the need for safe, decent and affordable housing with much of the Ashland population, as many Ashland households experience housing cost burden. This is the most immediate need for Housing Choice voucher holders. In recent years rents along with sale prices, have risen precipitously. Consequently, housing vouchers amounts and incomes have not kept pace with housing costs. Many voucher holders are unable to find homes that rent for a rate which will meet the requirements of the Housing Choice program. Some voucher holders are unable to secure housing in the time allowed and are unable to accept the voucher.

### How do these needs compare to the housing needs of the population at large

The percentage of Ashland households that experience housing cost burden is included in Tables 17, 18, and 19 on pages 29 and 30. Households at many income levels, up to and beyond 100% of Area Median Income, experience housing cost burden. Ashland, like much of the nation is experiencing a housing crisis, the primary result of this crisis is that households at all income levels are having to devote larger percentages of their incomes toward housing costs.

### Discussion

## NA-40 Homeless Needs Assessment – 91.205(c)

### Introduction:

**Chronically Homeless Populations**

According to the 2023 Continuum of Care Point in Time Count the total number homeless individuals surveyed totaled 1143. This was a 9.1% decrease from the previous year. Of those counted 49% were unsheltered, and nearly 21% of those surveyed qualified as chronically homeless. To be considered chronically homeless an individual must have experienced four episodes of homelessness in three years and also have a disabling condition or have been continuously homeless for 12 consecutive months and also have a disabling condition. Disabling conditions include: a diagnosable substance use disorder, a serious mental illness, a developmental disability, a chronic physical illness, including the co-occurrence of two or more of these conditions.

**Rapid Re-housing (Veteran's and their families)**

Rapid re-housing is a federally funded program that serves individuals and families experiencing homelessness who need time-limited assistance in order to get and keep housing. It reduces the length of time people experience homelessness, minimizes the impact of homelessness on their lives, and facilitates their access to resources in the community.

**Families**

In 2019 the Point in Time homeless count found 258 homeless people in families with at least one child, and 23 chronically homeless people in families with at least one child. Of the 258 homeless people in families, 99% were sheltered and 1% homeless people in families were unsheltered.

**Unaccompanied Youth**

In 2023, the Point in Time homeless count found 6 homeless unaccompanied youth under the age of 18 and 74 homeless unaccompanied young adults between the ages of 18 and 24. There were 10 homeless parenting youth between the ages of 18 and 24. Of the 80 unaccompanied youth found by conductors of the count, a total of 42 unaccompanied youth and children reported being in a shelter, while 38 reported being

unsheltered. However, as stated previously in this document, many homeless unaccompanied youth are not identified through the PIT count, as many do not meet the HUD definition of homelessness.

**If data is not available for the categories "number of persons becoming and exiting homelessness each year," and "number of days that persons experience homelessness," describe these categories for each homeless population type (including chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth):**

Data is not available for the numbers of persons becoming and exiting homelessness each year, or the number of days that persons experienced homelessness.

**Nature and Extent of Homelessness: (Optional)**

**Estimate the number and type of families in need of housing assistance for families with children and the families of veterans.**

An estimate of the number and type of families in need of housing assistance for homeless people in families and for homeless veterans is not provided in Point In Time (PIT) counts conducted by the regional Continuum of Care. The Jackson County Continuum of Care Coordinates the Point in Time count in January each year. The Point-in-time count is conducted for the entire county, totals for Ashland are separated out of the regional totals, however in recognition of the transient nature of the county's homeless population, data from the regional PIT counts will be included as well.

**Describe the Nature and Extent of Homelessness by Racial and Ethnic Group.**

The City does not have City specific data that breaks out racial and ethnic data by homeless household type. There is however, racial and ethnic data for Jackson county. The data show that the majority of those who are homeless in Jackson County are white, with the second largest racial group experiencing homelessness being American Indian/Alaska Native with 43 individuals, followed by Black, African American or African, at 31 individuals. Both racial groups are overrepresented in the homeless population, with American Indian/Alaska Natives representing 3.7% of the homeless population of Jackson County, while only being 1% of the total population of Jackson County, and Black, African American or African, comprising 2.7% of the homeless population while only representing 2.1% of the general population. This is a smaller disparity for Black, African American or African populations than in previous years, but slightly greater disparity for American Indian/Alaska Natives than previous years.

**Describe the Nature and Extent of Unsheltered and Sheltered Homelessness.**

According to 2023 Point in Time data approximately 1,143 individuals met HUD's definition of homeless in the last week of January. 51.3% of the County's homeless population identified as benefitting from some form of shelter, whether it is through emergency shelter, transitional housing, or permanent supportive housing, 19.2 % of survey respondents were identified as Chronically homeless, 26.7 percent identified as female, 49.4% identified as male, and .7% identified as non-binary, questioning or transgender. Because HUD's definition of homelessness does not include children and families who may be "doubled up" or "couch surfing" with another family, a known and common occurrence with unhoused unaccompanied youth, and unhoused families, consequently, the PIT count often represents and undercount of homeless youth and families. For 2023, the PIT count identified that 90% of those surveyed were in households without children, and 9.2% were in households with at least one child. Surveys were conducted with six homeless households who identified as unaccompanied youth, or which were comprised of individuals under the age of 18.

**Discussion:**

The homeless population in both Ashland and Jackson County have many unmet needs and face many barriers to meeting those needs. Chief among them is a lack of funding sources compared to the cost of

supporting the needs of the homeless population and providing case management. There is not enough Ashland-specific funding to support Ashland residents and programs, and the Federal programs that provide much of the funding to address these issues, such as those funded through the Department of Housing and Urban Development, are at risk of being defunded. Overall, this is due to a general lack of community support, at both the local and national levels.

It is a strategic priority of the City to target CDBG and other City funding to housing and services designed to work toward alleviating the issues facing homeless populations. Furthermore, the City is continuing its ongoing efforts to work with regional and local planning groups and committees to coordinate resources and implement the strategies outlined in the recently adopted Jackson County Strategic Plan. However, addressing the need for affordable housing and addressing the complex issues of homelessness and housing insecurity are so much bigger than one small rural community can move the needle on alone.

## NA-45 Non-Homeless Special Needs Assessment - 91.205 (b,d)

**Introduction:** The City of Ashland has an aging population, in the last decade, the percentage of the population aged 65 years old and older grew from 19% in 2010 to 22% in 2017, to 29% in 2023[2] It is expected that this age cohort will continue to grow and that as the population grows so too will their housing and service needs. Census data estimates that 11.5% of the total population of Ashland qualifies as having a disability.

**Describe the characteristics of special needs populations in your community:**

*Frail Elderly* while the extent of people who are over 65 with severely debilitated health is not known, Census data indicates that 21.3% of the population over 65 qualify as having a disability. In addition, RVCOG Food & Friends provided over 15,000 meals to Ashland seniors from the Ashland Senior Center host site. The 2023 American Community Survey 5-year estimates show that the population of Ashland that is 65 years old and older is 6,062 persons, or 29% of the total population of Ashland.

*Persons with disabilities* Census data reports that 2,435 people with disabilities resided in Ashland.

*Persons with Mental Illness* Mental illness can be mild and short-term or can be incapacitating and long-term. Mental illness can affect a person's ability to work or perform daily activities independently. According to Oregon's State Health Assessment for 2018, the State of Oregon has the "highest prevalence of mental illness among youth and adults of any state in the nation." [1] There were approximately 28,000 people with severe mental illness living in Jackson County (major mental illnesses, such as schizophrenia, bi-polar disorders, and other organic brain disorders) in 2014. Currently there is not a more updated Oregon State Health Assessment, nor is there updated information regarding the number of people living with severe mental illness in Jackson County. However, 2023 Community Health Assessment identifies that in both Jackson and Josephine Counties, 1 in 4 adults have been diagnosed with depression, which is a higher prevalence than the state. Similarly, both Jackson and Josephine Counties have higher rates of suicide mortality than in the State, while in Jackson County, youth who identified as Transgender, Queer, Bisexual and Lesbian/Gay all were more likely to attempt suicide in the past year compared to their peers and the state. Lastly, the Oregon Health Authority reports that 49.2% of adults in Oregon, and 43.9% of adults in Jackson County report 1 or more days of poor mental health in the past month, while 22.9% of 11th graders report unmet emotional and mental health care needs in the past 12 months.

*Victims of Domestic Violence* Domestic violence is a pattern of behavior where one partner in an intimate relationship chooses to use coercion, controlling and abusive behaviors to establish and maintain power and control over other people. Domestic Violence comes in many forms and can include physical, psychological, economic and emotional abuse. Victims of Domestic Violence have

[2] American Community Survey 5-Year Estimates, Table S1810

significant immediate needs for shelter and crisis services, and many benefit from long-term counseling and support to break the cycle of violence. Community Works, is the only agency in Jackon County that specializes in services for victims' violence. From 2022-2024 Community Works provided shelter to 471 individuals experiencing domestic violence, 46 of those were identified as residents of Ashland. In that same time Community Works served 606 victims of sexual assault, 35 of those individuals identified as Ashland residents. Additionally, Community Works provided advocacy, emotional support, resources to 3,394 adults and children and 215 were from Ashland.

*Substance Abuse* Chemical dependency is a complex chronic illness whose impact can be devastating to the lives of individuals and their families. A community health assessment for Jackson County compiled in 2023 found that compared to the entire state, a lower percentage of adults in both Jackson and Josephine counties, regardless of gender, reported engaging in binge drinking in the past month. In Jackson, people who identified as Black, Hispanic, and White NH had higher rates of alcohol-related deaths compared to those in the rest of the state. Both Jackson and Josephine counties had higher prevalence of current cigarette smokers than the state and the use of e-cigarettes has been increasing in both Jackson and Josephine in recent years. Individuals in the 18 to 34 age group exhibited a higher prevalence of current e-cigarette use compared to older age demographics in both counties and the State. Both Jackson and Josephine have higher drug mortality rates than the state, as well as having higher fentanyl mortality rates than the state.

### What are the housing and supportive service needs of these populations and how are these needs determined?

It has been documented throughout this document that Ashland has a desperate need for Housing and supportive services targeted to both non-homeless, special needs populations, as well as homeless populations, and presumed benefit populations. Many low-income families with children are experiencing housing Instability and are living with other families or are "doubled up" with others due to economic hardship, or are living in motels, vehicles, or other substandard housing situations. Many moderate- and low-income households are spending over 50% of their income on housing costs or are facing eviction or at imminent risk of losing housing. Many low-income households and presumed benefit populations and special needs populations lacking resources to navigate complex systems or lack support networks to help them maintain stable housing

Some primary needs identified by the members of the public and service providers include emergency housing stabilization support, rental assistance and security deposit assistance, assistance with basic needs, life food, medical/prescriptions, and other basic health supplies, especially for people who are housebound, or who lack transportation. There is an extreme need for emergencies and ongoing mental health services. Many populations are also impacted by rising inflation affecting housing affordability, growing rates of anxiety, depression, and isolation, limited access to services in rural areas, increasing food insecurity due to inflation.

The needs of non-homeless special needs populations were determined through a combination of public outreach and direct consultation with community partners and service providers (as described elsewhere in the document), and a review of state and local needs assessments and reports.

**Discuss the size and characteristics of the population with HIV/AIDS and their families within the Eligible Metropolitan Statistical Area:**

Very little data exists on the population with HIV/AIDS and their families within Ashland. The most recent data obtained from the Oregon Public Health Division indicates that there was a total of 126 cases of non-AIDS HIV cases and 159 cases of AIDS cases, for a total of 285 cases of HIV/AIDS in Jackson County as of April of 2019. Data further indicates that cases are highest among age groups 50 and over. Demographically, White non-Hispanic males are the populations experiencing the greatest incidents of infection in the Jackson County area.

**If the PJ will establish a preference for a HOME TBRA activity for persons with a specific category of disabilities (e.g., persons with HIV/AIDS or chronic mental illness), describe their unmet need for housing and services needed to narrow the gap in benefits and services received by such persons. (See 24 CFR 92.209(c)(2) (ii))**

**Discussion:** Not Applicable to Ashland.

## NA-50 Non-Housing Community Development Needs – 91.215 (f)

### Describe the jurisdiction's need for Public Facilities:

For a city the size of Ashland, there are many public facilities available that often are not found in other communities of Ashland's size. The City has a full-service healthcare facility, Assante Ashland Community Hospital, which offers a wide variety of services. However, Ashland also has access to two federally qualified health clinics, Rogue Community Health, and La Clinica De Valle, both of which offer a variety of services on a sliding scale fee basis. Ashland also has a Planned Parenthood office and access to a street nursing team through Oregon Health Sciences University.

Ashland is widely known for its high quality Parks and Recreation facilities which maintains arguably the largest and most popular park within Jackson County, Lithia park. In prior years, the City has dedicated CDBG funds to improving access to all of the City owned facilities, including parks buildings, to make them more accessible and available for public use.

The City of Ashland runs its own Senior Center through the Ashland Parks and Recreation Department which offers a variety of services including information and referral services, housing information and social interactions, access to hot meals through Food and Friends program of Rogue Valley Council of Governments, as well as recreational activities. Similarly, the City has a variety of housing options for senior and elderly populations that serve a continuum of housing and care needs, including some dedicated affordable housing units.

The City of Ashland is served by four primary providers of services to populations with special needs. Ashland Supportive Housing offers housing, support services, and outreach to peoples with developmental disabilities. Living Opportunities provides services to support independent living, employment support, skills training and education and outreach for peoples with developmental disabilities and their families. Options of Southern Oregon based in Grants Pass offers housing and support services for peoples with severe mental illness. And lastly, Pathway Enterprises offers employment support and placement within the community for peoples with developmental disabilities. Many other services for special needs populations are offered through County wide service providers, which do not have a location within the City of Ashland, but which are available to serve residents of Ashland.

Most recently, the City partnered with Access, the County's Community Action Agency and the State of Oregon to purchase a building to be utilized as an emergency low barrier shelter, an inclement weather shelter, and a social service and resource hub for people experiencing homelessness or at risk of homelessness. In extreme circumstances, the site could be utilized for respite and distribution of needed resources in cases of natural disasters or community wide emergencies.

### How were these needs determined?

Public facilities needs were determined through a combination of public outreach and direct consultation with community partners and service providers (as described elsewhere in the document), and reports, as well as from past experience.

### Describe the jurisdiction's need for Public Improvements:

Public Facilities improvements are funded from dedicated resources such as systems development charges, consequently the cost of funding these activities are generally not prioritized through the CDBG planning process. The City of Ashland completes a capital improvement plan which delineates the public facilities improvements the City has prioritized over a six-year period. Over the next five years the Capital improvement plan identifies several activities including water treatment plant improvements, and the dedication of funding on an annual basis to complete sidewalk and wheelchair ramp repairs and improvements. CDBG funds have been used in the past to support the development or improvement of Public facilities to serve special populations and presumed benefit populations.

### How were these needs determined?

Public Facilities improvements are funded from dedicated resources such as systems development charges, consequently the cost of funding these activities are generally not prioritized through the CDBG planning process. The City of Ashland completes a capital improvement plan which delineates the public facilities improvements the City has prioritized over a six-year period. Over the next five years the Capital improvement plan identifies several activities including water treatment plant improvements, and the dedication of funding on an annual basis to complete sidewalk and wheelchair ramp repairs and improvements. Public Facilities need for the provision of services were determined through community and provider input.

### Describe the jurisdiction's need for Public Services:

Currently the most pressing public service needs identified through the community outreach, direct consultation with service providers and through the public hearing process are:

- Immediate housing stabilization support
- Rental assistance and help with deposits
- Eviction prevention services
- Housing navigation services
- Emergency hotel vouchers
- Case management and advocacy
- Basic needs (food, hygiene supplies, clothing)
- Transportation assistance
- Educational support for children
- Mental health services
- Employment assistance and job training

- Childcare support
- Enhanced outreach to rural areas
- Culturally specific services
- Expanded mobile service delivery
- Prevention-focused programs
- Place for people experiencing homelessness to store their things
- A safe place for people experiencing homelessness to be during the day and at night.
- Ways to address increasing cost of living/earning livable wages
- Treatment beds, both for mental health and drug and alcohol treatment

**How were these needs determined?**

The City identifies prioritized public facilities improvement projects through a long-term master planning process involving community input through a public/public hearing process. The City also identifies project priorities based on federal and state regulatory requirements and available funding, as well as from community and provider input regarding resource/service gaps and identified barriers.

# Housing Market Analysis

## MA-05 Overview

### Housing Market Analysis Overview:

This section provides information on the affordability and condition of the housing market in the City of Ashland, which has unique existing housing conditions within the Rogue Valley housing market. These findings come from the 2023 Housing Capacity Analysis developed by EcoNorthWest. The key findings of the Ashland's Housing Capacity Analysis are that:

- **Ashland has sufficient land to accommodate its housing forecast between 2021 and 2041** and can accommodate growth (858 dwelling units) over the next 20 years with a surplus of capacity. Some development in the Suburban Residential, Normal Neighborhood, and Multifamily Residential Plan Designations will need to be accommodated in the City's urban growth boundary, outside the City Limits.
- **Ashland is planning for the continued growth of single-family detached units, however, more opportunities for multifamily and single-family attached will need to occur to meet the City's needs.** The factors driving the shift in types of housing needed in Ashland include changes in demographics and decreases in housing affordability. The aging of the baby boomers and the household formation of the millennials and Generation Z will drive demand for renter- and owner-occupied housing, such as single-family detached housing, townhouses, duplexes, tri- and quad-plexes, and apartments. Both groups may prefer housing in walkable neighborhoods, with access to services.
- **Over the 2021 to 2041 period, Ashland will need to plan for more multifamily dwelling units in the future to meet the City's housing needs.** Historically, 66% of Ashland's housing was single-family detached. While 35% of new housing in Ashland is forecast to be single-family detached, the City will need to provide opportunities for the development of new single-family attached (10% of new housing); duplex, triplex, and quadplex housing (10% of new housing); and multifamily units (35% of new housing).
- **Ashland has unmet needs for affordable housing.** Ashland has unmet housing needs for households with extremely-low and very-low-income households, as well as households with low- and middle-income. The forecast shows 273 of Ashland's new households will have incomes of $32,600 (in 2019 dollars) or less. These households can afford monthly housing costs of $820, which is considerably below market rate rents starting around $1,145 for a two-bedroom unit. About 127 of Ashland's new households will have incomes between $32,600 and $52,000 and can afford $820 to $1,300 in monthly housing costs.
- **Ashland will need more diverse housing types to meet these housing needs and address demographic changes.** These housing types include rental and ownership opportunities such as: small single-family detached housing, accessory dwelling units, cottage housing, townhouses, duplexes, tri- and quad-plexes, and apartments. Without the diversification of housing types,

lack of affordability will continue to be a problem, possibly growing in the future if incomes continue to grow at a slower rate than housing costs.

## A-10 Number of Housing Units – 91.210(a)&(b)(2)

### Introduction

### All residential properties by number of units

| Property Type | Number | % |
|---|---|---|
| 1-unit detached structure | 6,735 | 64% |
| 1-unit, attached structure | 855 | 8% |
| 2-4 units | 1,205 | 11% |
| 5-19 units | 800 | 8% |
| 20 or more units | 585 | 6% |
| Mobile Home, boat, RV, van, etc | 385 | 4% |
| ***Total*** | ***10,565*** | ***100%*** |

**Table 26 – Residential Properties by Unit Number**

**Data Source:** 2013-2017 ACS

### Unit Size by Tenure

| | Owners | | Renters | |
|---|---|---|---|---|
| | Number | % | Number | % |
| No bedroom | 0 | 0% | 395 | 9% |
| 1 bedroom | 135 | 3% | 1,095 | 25% |
| 2 bedrooms | 1,510 | 29% | 1,520 | 34% |
| 3 or more bedrooms | 3,610 | 69% | 1,450 | 33% |
| ***Total*** | ***5,255*** | ***101%*** | ***4,460*** | ***101%*** |

**Table 27 – Unit Size by Tenure**

**Data Source:** 2013-2017 ACS

### Describe the number and targeting (income level/type of family served) of units assisted with federal, state, and local programs.

The City of Ashland has a limited number of units that have received some form of federal, state, and/or local assistance requiring that the units be targeted to low-income or special needs populations. **Table 32** provides a list of units assisted with state or federal funding, the targeted income limit of the households, and the types of households the developments serve. Locally, the City's affordable housing program has restricted the deeds for several units through a variety of mechanisms, including land-use regulations, incentive programs, and investment of Community Development Block Grant (CDBG) dollars. Though some of these units are rental units, the majority of the units are owner-occupied.

### Provide an assessment of units expected to be lost from the affordable housing inventory for any reason, such as expiration of Section 8 contracts.

Since 2008, 89 units receiving HUD project based subsidies have expired without the renewal of HUD-funded Section 8 contracts (this number is not representative of other types of state or federally financed units, just HUD project based subsidized units). This represents 41% of the City's total subsidized housing stock targeted to those with the lowest incomes and the greatest need for housing assistance. These units represent 95% of the City's Section 8 contracted properties. The 12-unit housing development, Star Thistle, is the only remaining HUD-financed property within the City. The City does not anticipate the further loss of affordable housing units due to expiring Section 8 contracts or for other reasons. The remaining balance of units required to be affordable through state and federal obligations are detailed in **Table 31** and **Table 32** above.

According to data provided by the Housing Authority of Jackson County, there are a total of 292 households that hold Section 8 vouchers and 380 households on the waitlist for Section 8 vouchers in the City of Ashland. There are 163 subsidized project-based units within the City of Ashland. The Housing Authority of Jackson County's Public Housing Authority plan goals are consistent with the City of Ashland's Consolidated Plan goals.

### Does the availability of housing units meet the needs of the population?

Currently, providers of affordable housing units within the City of Ashland report that they must maintain waiting lists because there are not generally readily available units. The Housing Authority of Jackson County reports that the Section 8 waitlist for the City of Ashland comprises 380 households. HAJC reports seeing an increased need for housing over the 60% AMI threshold. More and more people are being denied affordable housing for being over income, for traditionally financed affordable housing, but are still not earning enough to afford market rate rents. At the same time there continues to be a large portion of the population who are needing assistance with rents in deed restricted affordable units. And lastly, many voucher holders are unable to find and secure affordable rental housing due to high rents and low vacancy rates. Based on feedback from the community and from affordable housing providers, it is an obvious conclusion that the number and price point of housing units does not meet the needs of the population at nearly every level of income, accept those who are earning more than 100% of the Area median income.

### Describe the need for specific types of housing:

Affordable housing providers and a multitude of other sources cite the need for regulated affordable housing units, housing units affordable to those with the lowest incomes, with moderate incomes, and with "middle incomes" (above 60% but below 100% of the AMI) and housing units which are accessible and allow for households to age in place, or that provide on-site supportive services.

### Discussion

The City continues to have a need for all types of housing targeted to all income levels, rental and ownership housing types, for low-income, moderate-income, and middle-income households. The City is

expecting the development several new affordable housing units to be developed within the next five-year period. However, the City of Ashland continues to face challenges to meet the demand for affordable housing.

**2023 Housing Production Strategy**

In 2023, with a grant from the Department of Land Conservation, the City was able to hire a consultant, EcoNorthwest, to develop strategies and identify actions to encourage and support the development of needed housing types. Through this process the City developed four initiatives and 12 actions that address key housing needs in the city, focusing on outcomes of implementing the actions. The initiatives comprise a set of potential city-led strategies, funding sources, and potential partnerships with other entities that help to achieve an overarching goal. By bundling strategies and funding sources, the City acknowledges that several strategies and partnerships are necessary to achieve the City's housing goals.

- Encourage development of low- and moderate-income affordable rental housing. This initiative seeks to increase the housing options for unregulated rental households earning between 60% and 120% of MFI ($43,900 to $87,700).
    - Evaluate participating in or establishing a land bank.
    - Disallow SFD in High Density R-3 Zone
    - Evaluate increasing allowances for residential dwellings in commercial and employment zones
    - Increase development capacity of MFR dwellings through changes to the Land Use Ordinance
    - Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing
- Increase opportunities for affordable homeownership. This initiative seeks to increase the housing options for homeownership for households earning less 120% of MFI (less than $87,700).
    - Evaluate opportunities to participate in a land trust.
    - Maintain quality and support preservation of existing manufactured home parks
    - Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development
- Encourage development of income-restricted affordable housing units. There are limited options available in Ashland that are affordable to households with income of less than 60% of MFI ($43,900). This initiative supports development of housing affordable in this income group.
    - Work with partners to support development of additional permanent supportive housing
- Preserve existing of low- and moderate-income affordable housing. This initiative seeks to increase the housing options for households earning less than 120% of MFI (less than $87,700).
    - Preserve and improve existing low-cost, unregulated, rental housing
    - Host educational events with the Housing and Human Services Advisory Committee or other organizations

- Develop an equitable housing plan

## MA-15 Housing Market Analysis: Cost of Housing - 91.210(a)

### Introduction

According to the 2023 American Community Survey, there are a total of 11,499 residential housing units in the City of Ashland. Of the total housing units, 59.3% are 1-unit detached, 13.1% are 1-unit attached, 10.4% are 2-4 units, 7.4% are 5-19 units, 8.3% are 20 or more units, and the remaining 1.5% are mobile homes, boats, RVs, vans, etc. The following tables reflect the cost of both owner- and renter-occupied housing in the City of Ashland, according to the US Census ACS data. Due to the nature of the last ten years in the housing market, there have been changes in housing pricing and rent that are not fully shown here but will be discussed at the end of this section.

### Cost of Housing

| | Base Year: 2009 | Most Recent Year: 2017 | % Change |
|---|---|---|---|
| Median Home Value | 393,300 | 392,000 | (0%) |
| Median Contract Rent | 695 | 919 | 32% |

**Table 28 – Cost of Housing**

**Data Source:** 2000 Census (Base Year), 2013-2017 ACS (Most Recent Year)

| Rent Paid | Number | % |
|---|---|---|
| Less than $500 | 554 | 12.4% |
| $500-999 | 2,095 | 47.0% |
| $1,000-1,499 | 1,080 | 24.2% |
| $1,500-1,999 | 555 | 12.4% |
| $2,000 or more | 175 | 3.9% |
| ***Total*** | ***4,459*** | ***100.0%*** |

**Table 29 - Rent Paid**

**Data Source:** 2013-2017 ACS

### Housing Affordability

| Number of Units affordable to Households earning | Renter | Owner |
|---|---|---|
| 30% HAMFI | 80 | No Data |
| 50% HAMFI | 305 | 240 |
| 80% HAMFI | 1,700 | 255 |
| 100% HAMFI | No Data | 319 |
| ***Total*** | ***2,085*** | ***814*** |

**Table 30 – Housing Affordability**

**Data Source:** 2013-2017 CHAS

### Monthly Rent

| Monthly Rent ($) | Efficiency (no bedroom) | 1 Bedroom | 2 Bedroom | 3 Bedroom | 4 Bedroom |
|---|---|---|---|---|---|
| Fair Market Rent | 946 | 1062 | 1396 | 1967 | 2357 |
| High HOME Rent | 946 | 1050 | 1262 | 1450 | 1598 |
| Low HOME Rent | 768 | 823 | 988 | 1141 | 1273 |

**Table 31 – Monthly Rent**

**Data Source:** HUD FMR and HOME Rents

### Is there sufficient housing for households at all income levels?

Ashland lacks sufficient rental housing for households at all but the highest income levels, and rental and ownership housing for households earning between 30%-100% of Area Median Income (or between $31,000 and $88,000 a year for a family of four). According to the 2019-2023 American Community Survey estimates, the median home value in Ashland is $573,700. The median household income for Ashland according to ACS estimates was $71,782. By contrast, the median home value in Medford, just 19 miles to the north of Ashland, was $376,200. These numbers make it easier to illustrate the reality of housing market in the valley and its impact on the choices valley residents make in choosing where to purchase housing.

### How is affordability of housing likely to change considering changes to home values and/or rents?

Both the cost of owner-occupied homes and rentals have become more expensive in the City of Ashland. Since the drafting of the last Consolidated Plan. According to ACS data, the median owner-occupied home value increased by 18%, from $321,200 (2011-2013 ACS) to $392,000 (2013-2017 ACS) and 31.6% to $573,700 (2019-2023) for a total increase of nearly 50% in the last decade. The 2011-2013 ACS reported median rent at $923, increasing to $1056 in 2013-2017 ACS estimates to $1,367 in 2019-2023. Because of these increases in both rent and home values, affordability is decreasing for many Ashland residents and housing cost burden for both homeowners and renters is increasing. Current market conditions do not see housing prices coming down in the near future. Interest rates increased after the pandemic and shortages of building supplies and workers in that same period drove up the cost of construction, while severely constrained markets and the lack of upward mobility drove demand for an already overburdened rental market.

### How do HOME rents / Fair Market Rent compare to Area Median Rent? How might this impact your strategy to produce or preserve affordable housing?

Home and Home Fair Market rents in the City of Ashland are significantly less than the area median rent reported in 2019-2023 ACS five-year estimates for all unit sizes. This shows that there is a significant

need for more affordable housing units at all income levels and bedroom sizes. As rents increase those on fixed incomes like the will become increasingly cost burdened.

### Discussion

According to HUD, households who pay more than 30 percent of their income for housing are cost burdened, possibly unable to afford other necessities such as food, clothing, transportation, and medical care. These households may also have fewer resources to maintain their homes, so are at greater risk for foreclosure and eviction.

The 2019-2023 ACS shows that the median household income in the City of Ashland is $71,782. According to HUD definitions, 44.2% of owners are cost-burdened in the City of Ashland, while 55% of renters are cost-burdened.

## MA-20 Housing Market Analysis: Condition of Housing – 91.210(a)

### Introduction

The 2019-2023 ACS estimates that out of all occupied housing units, (11,499 units) 78.4% were built before 2000, and these homes are more likely to require repairs in order to provide safe and decent affordable housing. In order to assess the quality of the housing inventory and easily determine the homes in which the quality of living and housing is considered substandard, ACS reports “selected conditions.” According to ACS, selected conditions for owner- and renter-occupied housing units are as follows: (1) lacking complete plumbing facilities, (2) lacking complete kitchen facilities, (3) with 1.01 or more occupants per room, (4) selected monthly owner costs as a percentage of household income greater than 30%, and (5) gross rent as a percentage of household income greater than 30%. According to ACS, 31% of owner-occupied and 52% of renter-occupied units have one selected condition. Additionally, 5% of renter-occupied units have two selected conditions.

The majority of units built before 1980 are at risk for lead-based paint hazard. 2,790 owner-occupied units (53%) were at risk of lead-based paint hazard, 475 (9%) of which have children present. 2,475 renter-occupied units (56%) were at risk of lead-based paint hazard, 95 (2%) of which have children present.

### Describe the jurisdiction's definition of "standard condition" and "substandard condition but suitable for rehabilitation":

HUD has defined as substandard housing that: “is dilapidated; does not have operable indoor plumbing; does not have a usable flush toilet inside the unit for the exclusive use of a family; does not have usable bathtub or shower for exclusive use of a family; does not have electricity, or has inadequate or unsafe electrical service; does not have a safe or adequate source of heat; should, but does not, have a kitchen; or has been declared unfit for habitation by an agency or unit of government.”[1]Substandard condition but suitable for rehabilitation can be defined as housing that similarly does not meet building, fire, and safety codes but is financially and structurally feasible for rehabilitation. If rehabilitation costs exceed 30 to 50 percent of the assessed property value, it may be financially unfeasible.

### Condition of Units

| Condition of Units | Owner-Occupied | | Renter-Occupied | |
|---|---|---|---|---|
| | Number | % | Number | % |
| With one selected Condition | 1,620 | 31% | 2,335 | 52% |
| With two selected Conditions | 0 | 0% | 220 | 5% |
| With three selected Conditions | 0 | 0% | 4 | 0% |
| With four selected Conditions | 0 | 0% | 0 | 0% |
| No selected Conditions | 3,640 | 69% | 1,895 | 42% |
| ***Total*** | ***5,260*** | ***100%*** | ***4,454*** | ***99%*** |

**Table 32 - Condition of Units**

**Data Source:** 2013-2017 ACS

## Year Unit Built

| Year Unit Built | Owner-Occupied | | Renter-Occupied | |
|---|---|---|---|---|
| | Number | % | Number | % |
| 2000 or later | 970 | 18% | 655 | 15% |
| 1980-1999 | 1,500 | 29% | 1,325 | 30% |
| 1950-1979 | 1,765 | 34% | 1,530 | 34% |
| Before 1950 | 1,025 | 19% | 945 | 21% |
| ***Total*** | ***5,260*** | ***100%*** | ***4,455*** | ***100%*** |

**Table 33 – Year Unit Built**

**Data Source:** 2013-2017 CHAS

## Risk of Lead-Based Paint Hazard

| Risk of Lead-Based Paint Hazard | Owner-Occupied | | Renter-Occupied | |
|---|---|---|---|---|
| | Number | % | Number | % |
| Total Number of Units Built Before 1980 | 2,790 | 53% | 2,475 | 56% |
| Housing Units build before 1980 with children present | 475 | 9% | 95 | 2% |

**Table 34 – Risk of Lead-Based Paint**

**Data Source:** 2013-2017 ACS (Total Units) 2013-2017 CHAS (Units with Children present)

## Vacant Units

| | Suitable for Rehabilitation | Not Suitable for Rehabilitation | Total |
|---|---|---|---|
| Vacant Units | 0 | 0 | 0 |
| Abandoned Vacant Units | 0 | 0 | 0 |
| REO Properties | 0 | 0 | 0 |
| Abandoned REO Properties | 0 | 0 | 0 |

**Table 35 - Vacant Units**

## Need for Owner and Rental Rehabilitation

Many of the City of Ashland's renter-occupied units have at least one selected condition at 52%, while 31% of owner-occupied units have at least one selected condition defined by the ACS. There are 1,620 owners and 2,335 renters in total that have at least one selected condition. Age is also a significant factor in housing conditions and rehabilitation necessity. As units age, maintenance becomes more expensive. This will place more burden on homeowners and could pose more challenges to tenants whose landlords are unable to make immediate repairs.

### Estimated Number of Housing Units Occupied by Low- or Moderate-Income Families with LBP Hazards

Lead-based paint exposure is a major environmental health hazard, and many homes built before 1978 were painted with lead-based paint. Thus, the majority of units built before 1980 are at risk for lead based paint hazard. Although a hazard for all people, lead exposure is especially hazardous for children and can result in behavioral and learning problems, lower IQ, slowed growth, hearing problems, and anemia. Low- and moderate-income families are more likely to live in older and less-maintained housing units, increasing their likelihood of lead exposure. A total of 2,790 owner-occupied units (53%) were at risk of lead-based paint hazard, 9% that have children present. 2,475 renter-occupied units (56%) were at risk of lead-based paint hazard, 2% that have children present.

### Discussion

## MA-25 Public and Assisted Housing – 91.210(b)

### Introduction

The City of Ashland does not have any public housing developments.

### Totals Number of Units

| Program Type | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Certificate | Mod-Rehab | Public Housing | Vouchers | | | | | |
| | | | | Total | Project -based | Tenant -based | Special Purpose Voucher | | |
| | | | | | | | Veterans Affairs Supportive Housing | Family Unification Program | Disabled * |
| # of units vouchers available | 0 | 94 | 0 | 1,860 | 24 | 1,836 | 773 | 139 | 1,270 |
| # of accessible units | | | | | | | | | |
| *includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition | | | | | | | | | |

**Table 36 – Total Number of Units by Program Type**

**Data Source:** PIC (PIH Information Center)

**Describe the supply of public housing developments:** Not Applicable.

**Describe the number and physical condition of public housing units in the jurisdiction, including those that are participating in an approved Public Housing Agency Plan:** Not Applicable.

**Public Housing Condition**

| Public Housing Development | Average Inspection Score |
|---|---|
| | |

**Table 37 - Public Housing Condition**

**Describe the restoration and revitalization needs of public housing units in the jurisdiction:** Not Applicable.

**Describe the public housing agency's strategy for improving the living environment of low- and moderate-income families residing in public housing:** Not Applicable.

**Discussion:**

## MA-30 Homeless Facilities and Services – 91.210(c)

### Introduction

The Ashland City Council recognizes homelessness as a critical issue in our community. We're actively working with partners to reduce hardships that lead to homelessness and increase access to affordable housing for our residents and families with children who are unsheltered or at-risk of becoming homeless. We're taking a collaborative approach and adapting multiple best practices to fit our community. In 2023, the City of Ashland acquired a property at 2200 Ashland St. to provide homeless shelter and related services, and to have a space to open a severe weather shelter when needed. Over the years the City has partnered with several non-profit organizations to provide needed shelter oversight, for both short-term inclement weather shelters and longer term every night low barrier shelters. Community partners have included OHRA, Rogue Retreat, and Southern Oregon Jobs with Justice. The City has utilized State, local, and during the pandemic, federal funding to support these efforts. Currently, the Fire Code restrictions on the 2200 Ashland St property will not permit us to operate the shelter for more than 90 days in 2025. In November 2024, Council voted unanimously to leverage CDBG (Community Development Building Grant) funds to upgrade the 2200 Ashland St property to make it usable year-round for a severe weather shelter. The number of shelter and housing units for homeless households provided in Housing Inventory Chart, with the exception of the OHRA Center Shelter and the Parker House Shelter, are physically located outside of the City of Ashland but within Jackson County and all programs/beds are available to serve the homeless households within Ashland.

The City of Ashland Housing Program administers three sources of funding: Affordable Housing Trust Fund, Social Service Grant Funds, Community Development Block Grant (CDBG) funds. These funding sources can be utilized to provide resources to assist area non-profit agencies in providing a range of services and housing activities to support the continuum of housing needs, from emergency shelter, case management and navigation services, to funding to support essential services for homeless populations.

The City provides funding to support a variety of shelter and housing-focused services from a variety of service providers in Ashland and across the Jackson County region, including Opportunities for Housing Resources & Assistance (OHRA), Community Works, St. Vincent DuPaul and Maslow Project.

## Facilities and Housing Targeted to Homeless Households

| | Emergency Shelter Beds | | Transitional Housing Beds | Permanent Supportive Housing Beds | |
|---|---|---|---|---|---|
| | Year Round Beds (Current & New) | Voucher / Seasonal / Overflow Beds | Current & New | Current & New | Under Development |
| Households with Adult(s) and Child(ren) | 112 | | 163 | 298 | |
| Households with Only Adults | 255 | | 128 | 183 | |
| Chronically Homeless Households | | | | | |
| Veterans | | 25 | 13 | 70 | |
| Unaccompanied Youth | 19 | | 27 | | |

**Table 38 - Facilities and Housing Targeted to Homeless Households**

**Describe mainstream services, such as health, mental health, and employment services to the extent those services are used to complement services targeted to homeless persons**

The City of Ashland has a local self-sufficiency office for the Oregon Department of Human Services (DHS), Children, Adults and Families Division. DHS provides many services including food benefits, health coverage assistance, cash assistance, and senior services. Additionally, the City of Ashland established the Housing and Human Services Advisory Committee in 2013, which assesses and makes recommendations to the City Council to address the continuum of housing and human services needs within the City using general fund moneys. Assante Ashland Community Hospital and Rogue Community Health, and La Clinica offer healthcare services including mental health services. The Ashland Emergency Food Bank, Ashland Food Angels, Rogue Food Unites, Peace House, and Southern Oregon Jobs with Justice all provide food, hot meals, and other resources to both housed and unhoused populations.

**List and describe services and facilities that meet the needs of homeless persons, particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth. If the services and facilities are listed on screen SP-40 Institutional Delivery Structure or screen MA-35 Special Needs Facilities and Services, describe how these facilities and services specifically address the needs of these populations.**

## Physical and Mental Health Services for Homeless and At-risk populations

- ***Assante-Ashland Community Hospital:*** Ashland Community Hospital offers a variety of physical and mental health services.
- ***La Clinica Del Valle:*** La Clinica Del Valle offers sliding scale services for physical, mental, and dental health care for all populations. La Clinica also provides a mobile clinic service which serves homeless and at-risk populations throughout Jackson County by providing free or low-cost physical, mental, and dental services at a variety of locations. The La Clinica Mobile Health Clinic has regular service hours in Ashland at the Tuesday family and community meal hosted by the Methodist Church and Uncle Food's Diner.
- ***Rogue Community Health (formerly the Community Health Center):*** Rogue Community Health Center is a federally-qualified health center offering sliding scale fees for physical, dental and mental health services. Rogue Community Health Center has satellite clinics in several underserved rural and impoverished areas, including a clinic in Ashland.
- ***Jackson County Mental Health:*** Jackson county mental health offers a variety of mental health services including counseling and case management for homeless and at-risk populations.

## Services for Homeless Veterans

- ***Southern Oregon Rehabilitation Center and Clinics (SORCC):*** The SORCC offers a wide variety of services for homeless veteran populations including housing, physical and mental health services, and financial and housing assistance.
- ***Columbia Care-Supportive Services for Veteran Families (SSVF):*** The SSVF program provides supportive services for low-income veterans and their families residing in or transitioning to permanent housing. The program is designed to increases housing stability and reduce the incidence of homelessness among the veteran populations. The SSVF program provides case management services, financial assistance for housing stabilization, housing placement services,

and assistance with obtaining other public benefits and services including those benefits and services offered through the Department of Veterans Affairs. Columbia Care also offers the Grant per Diem program, HUD-VASH program and provides rental assistance and case management to veterans in addition to the SSVF program.

- ***Easter Seals Homeless Veterans Reintegration Program (HVRP):*** The HVRP program provides employment support services that assist homeless veterans in reintegrating into the community.
- ***Rogue Valley Veteran and Community Outreach (RVVCO):*** RVVCO provides housing and case management services for homeless and transitioning veterans.

## Housing and services for Homeless and Chronically Homeless Populations

***Rogue Retreat:*** Rogue Retreat offers permanent support and services including case management for homeless and chronically homeless populations. Rogue Retreat also runs Hope Village in Medford, the transitional housing tiny house village, the Crossings campground, and the Kelly Shelter, a year-round 54-Bed low-barrier (housing first) homeless shelter.

***Opportunities for Housing Resources and Assistance (OHRA):*** OHRA operates a low-barrier, non-congregate, shelter, a laundry shower trailer and a drop-in resource center with navigation services and access to resources from community partners.

***Parker House:*** Offers transitional housing and case management for single women with children.

***Salvation Army Hope House:*** Hope House is a transitional housing program offering case management services. Hope House serves homeless, at-risk, and chronically homeless individuals and families and is supported through a variety of funding sources including Continuum of Care grant funding and CDBG.

## Housing and Services for Homeless and Unaccompanied Youth and At-Risk Youth and their Families

- ***Maslow:*** Maslow Project is funded partially from McKinney Vento funds to address issues of homelessness in school-age children and their families. Maslow provides a number of services including school-based and community outreach, case management, school supplies, and other resources to meet basic needs including housing resources and stabilization. Maslow also offers counseling and advocacy. Since 2012, the City of Ashland has awarded CDBG grant funds to the Maslow project to support a part-time, school-based advocate.
- ***Community Works –Transitional Living Program:*** The transitional living program (TLP) serves youth between the ages of sixteen and twenty-two to work towards independent living in the community. The transitional living program offers case management, mental and physical health services, educational and vocational services, and housing assistance funded in part by the Continuum of Care grant program.
- ***Hearts with a Mission:*** Hearts with a Mission (HWAM) is Jackson County's only shelter serving homeless and at-risk youth. HWAM offers emergency shelter for up to 72 hours for youth between the ages of ten and seventeen and up to 120 days with parental or guardian consent. HWAM offers case management, individual and family counseling, education, life skills and vocational resources, and transition planning services.

## MA-35 Special Needs Facilities and Services – 91.210(d)

### Introduction

There are several resources to assist the elderly, frail elderly, and persons with physical and developmental disabilities within the City of Ashland. Those services are detailed in the appropriate sections below. For other special needs populations, persons with alcohol and other drug addictions, and persons with HIV/AIDS and their families, the facilities and services available are primarily located in the City of Medford, nineteen miles to the north, but are available to all county residents.

### Including the elderly, frail elderly, persons with disabilities (mental, physical, developmental), persons with alcohol or other drug addictions, persons with HIV/AIDS and their families, public housing residents and any other categories the jurisdiction may specify, and describe their supportive housing needs

**Facilities and Services for the Elderly and the Frail and Elderly**

- ***City of Ashland Senior Center***: The Ashland Senior Program strives to provide a support system to the older residents of Ashland, helping to enable them to live more independently and to continue as contributing members of the community. The Senior Center provides a venue for social interaction through recreational and health-related activities and educational opportunities.
- ***Linda Vista Nursing and Rehabilitation Center:*** Linda Vista Nursing and Rehabilitation Center provides intensive rehabilitation and recovery for those who no longer require hospitalization.
- ***Skylark Assisted Living and Memory Care Center***: Skylark Assisted Living and Memory Care Center provides a full range of personal care services, as well as social activities and many housing options. Skylark designs care around the individual, tailoring services to specific needs of each resident. In the memory care community, Skylark focuses on improving residents' quality of life through social interaction, specially designed living spaces, and creative therapies. Skylark serves those with memory disorders, including Alzheimer's disease, stroke, and Parkinson's related dementia.
- ***Maple Ridge Senior Living Center:*** Brookdale provides many senior living solutions, including independent living, assisted living, memory care, skilled nursing care, therapy, hospice, home health, life care, and continuing care retirement communities.
- ***Ashland at Home***: *Ashland At Home (AAH)* is an organization that supports neighbors helping neighbors live in their own homes and stay engaged in our community as long as possible. *AAH* is based on the "village" model that is serving tens of thousands of adults across the U.S. The model, developed by neighbors living in the Beacon Hill area of Boston, provides services to support members to continue living in their homes as they age.
- ***Ashland Emergency Food Bank:*** Ashland Emergency Food Bank is a private, independent 501(c)(3) non-profit organization that where local faith groups, in alliance with the community at large, provide emergency food supplies, without charge, to individuals and families in the Ashland/Talent area who would otherwise go hungry. The organization also endeavors to

increase awareness about the problem of hunger in our communities. Ashland Emergency Food Bank is now offering home delivery services for seniors.

- ***Rogue Valley Council of Governments Senior and Disability Services***: The Rogue Valley Council of Governments (RVCOG) is a voluntary association of local jurisdictions in Jackson and Josephine counties. Through its Senior & Disability Services, it assists seniors and adults with disabilities. As the Area Agency on Aging for this district, the RVCOG has developed a network of services to help seniors and adults with disabilities live with dignity and independence. Services include: Food & Friends (Meals on Wheels), In-Home Care, Disaster Registry, Foster Home Licensing, Powerful Tools for Care giving, Living Well with Chronic Conditions Lifelong Housing Certification Project, Medical Supplies, Case Management, Protection from Abuse, Family Caregiver Program.
- ***Rebuilding Together Rogue Valley:*** Rebuilding Together Rogue Valley (RTRV) offers the "Safe-at-Home program" which helps low-income seniors and persons with disabilities safely "age-in-place" as long as possible in their current homes. RTRV programs aim to Prevent falls, improve accessibility and provide improved indoor air quality.

**Families and Services for Peoples with Mental, Physical and Developmental Disabilities**

- ***Ashland Supportive Housing (ASH):*** Provides clients with three group homes with five bedrooms in each home, with the ability to support 15 individuals total. ASH also serves adults with I/DD living independently through its Community Outreach program, providing the support needed to remain as independent as possible.
- ***Jackson County Mental Health:*** Provides Information, referral, and screening; immediate crisis assessment and intervention for mental health crises; a comprehensive array of treatment services to adults and children covered by the Oregon Health Plan who have a mental illness and are in need of treatment; a range of services for individuals with serious mental illness who are without insurance and are at-risk for state hospitalization or jail due to their mental illness.
- ***Living Opportunities:*** Supports people with intellectual and developmental disabilities to live, work, and play in the community. Living Opportunities believes that success happens the people they serve can live independently, experience meaningful and rewarding careers, and in that process, become truly self-sufficient.
- ***Options/Starthistle***: Options serves as the Community Mental Health Program for Josephine County and provides additional services, such as an Integrated Primary Medical Care program (Hillside Medical) for all members of the community. Options for Southern Oregon serves people of all ages who have mental health needs. Its holistic approach addresses housing, advocacy, community integration, crisis intervention, therapy, co-occurring issues, education, work, and economic well-being.
- ***Pathway Enterprises:*** Offers people with disabilities opportunities to live, work, and recreate in their communities so they may experience personal growth, integration, and independence.

- ***OnTrack, Inc. Addiction Recover Programs and Services:*** On track provides many different service offerings to meet the needs of almost anyone requiring treatment. This includes evaluation and treatment services, youth services, and housing for special needs.
- ***Addictions Recovery Center (ARC):*** ARC seeks to inspire hope and healthy choices through education and supportive relations so individuals can recover from the disease of addiction. Services include residential programs, day treatment, intensive out-patient, outpatient, pain management certificate course, DUII flex program, veterans service, transition, drop-in sobering program, community education, gambling awareness, pain management, and a domestic abuse alternative program.
- ***Kolpia Counseling Services:*** Kolpia Counseling Services offers a patient-centered integrative approach to helping the community heal, learn, and grow through the difficulties of substance abuse, addiction, and mental health afflictions. Services include mental health counseling, addiction counseling, suboxone tapering, acupuncture, nutrition counseling, yoga therapy, mindfulness meditation, and mobility training.
- ***Columbia Care:*** Offers a wide variety of services to populations experiencing mental illness and drug addiction. Their services include residential treatment programs, supportive and integrated housing, crisis services and programs, suicide prevention, veterans housing and reintegration services, integrated outpatient services and other community-based care, rental assistance programming, supported education and employment, and peer support services.
- ***Phoenix Counseling Center, Inc:*** Offers a variety of services that include substance use, co-occurring disorders, traditional mental health counseling, parenting and family support services.
- ***ROC Recovery Center:*** The ROC Recovery Center is a faith-based organization that provides services to individuals struggling with substance use dependance, mental illness, domestic violence, homelessness, and emotional trauma. The ROC provides intensive outpatient services, as well as individual peer support and counseling services. The ROC also helps connect people to other community resources and opportunities.

### Describe programs for ensuring that people returning from mental and physical health institutions receive appropriate supportive housing

The City of Ashland has a local self-sufficiency office for the Oregon Department of Human Services (DHS), Children, Adults and Families Division. DHS provides many services including food benefits, health coverage assistance, cash assistance, and senior services. Additionally, the City of Ashland established the Housing and Human Services Advisory Committee in 2013, which assesses and makes recommendations to the City Council to address the continuum of housing and human services needs within the City using general fund moneys. Ashland, like many communities, has a severe lack of supportive housing options for people experiencing mental or physical health barriers. Housing units built or remodeled with the intention of providing accessibility features or incorporating universal design are becoming more prevalent throughout the community but are still not accessible or available at the levels or in price ranges needed to meet the growing demand of a community with an aging

population. Similarly, housing with supportive services for people experiencing severe persistent mental illness (SPMI) is a resource that has long been identified as a crucial need in the community, leaving many SPMI individuals facing homelessness due to the lack of this needed resource in the community

**Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. 91.315(e)**

The specific activities to be addressed are determined on an annual basis through a competitive process. In prior years the City has funded several activities that address the housing and supportive service needs of persons with special needs including: the remodel of an employment support facility for peoples with developmental disabilities, and the installation of a covered bus shelter in front of a housing complex for peoples with mental illness. Most recently the City provided Affordable Housing Trust Fund money to Columbia Care to offset land acquisition costs in support of an affordable housing project for households experiencing severe persistent mental illness.

**For entitlement/consortia grantees: Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. (91.220(2))**

The specific activities to be addressed are determined on an annual basis through a competitive process.

## MA-40 Barriers to Affordable Housing – 91.210(e)

### Negative Effects of Public Policies on Affordable Housing and Residential Investment

Over the years that City has spent considerable resources identifying and working to remove or mitigate barriers to the development of affordable housing. As with the housing market, barriers to affordable housing development are an ever-changing target and consequently require ongoing work to identify and remediate.

**Negative Effects of Public Policies on Affordable Housing and Residential Investment**

**1. Lack of affordable single-family housing types.**

- There are limited regulatory tools available to promote single family development in the State of Oregon.
- While the City has several incentives for the development of affordable single-family housing, they are inadequate to counteract the strong market forces that currently exist in the Ashland housing market.

**2. Small inventory of multifamily housing.**

- Limited land zoned for multifamily housing.
- Conversion of multifamily housing to condominiums.
- Housing developed in commercial or employment zones are typically developed as market rate or high end condominium units.
- Multi-family zone lands are often developed as ownership housing rather than rental housing.

**3. Lack of investment**

- Elderly low-income residents are physically and financially unable to afford making necessary repairs or improvements to their homes and lack financial capacity to pay for a contractor to complete repairs.

**4. Low-income housing project developers must compete with market rate developers for land in the City.**

**5. Federal Regulations/Funding Sources can add costs and expand timelines for affordable housing developers that can jeopardize the viability of the project.**

## MA-45 Non-Housing Community Development Assets – 91.215 (f)

### Introduction

### Economic Development Market Analysis

### Business Activity

| Business by Sector | Number of Workers | Number of Jobs | Share of Workers % | Share of Jobs % | Jobs less workers % |
|---|---|---|---|---|---|
| Agriculture, Mining, Oil & Gas Extraction | 180 | 47 | 3 | 1 | -2 |
| Arts, Entertainment, Accommodations | 1,632 | 2,940 | 25 | 36 | 11 |
| Construction | 226 | 168 | 3 | 2 | -1 |
| Education and Health Care Services | 1,295 | 1,294 | 20 | 16 | -4 |
| Finance, Insurance, and Real Estate | 294 | 247 | 5 | 3 | -1 |
| Information | 194 | 280 | 3 | 3 | 0 |
| Manufacturing | 324 | 459 | 5 | 6 | 1 |
| Other Services | 326 | 417 | 5 | 5 | 0 |
| Professional, Scientific, Management Services | 417 | 392 | 6 | 5 | -2 |
| Public Administration | 0 | 0 | 0 | 0 | 0 |
| Retail Trade | 1,040 | 1,475 | 16 | 18 | 2 |
| Transportation and Warehousing | 119 | 60 | 2 | 1 | -1 |
| Wholesale Trade | 195 | 189 | 3 | 2 | -1 |
| Total | 6,242 | 7,968 | -- | -- | -- |

**Table 39 - Business Activity**

**Data Source:** 2013-2017 ACS (Workers), 2017 Longitudinal Employer-Household Dynamics (Jobs)

## Labor Force

| | |
|---|---|
| Total Population in the Civilian Labor Force | 10,525 |
| Civilian Employed Population 16 years and over | 9,930 |
| Unemployment Rate | 5.61 |
| Unemployment Rate for Ages 16-24 | 15.79 |
| Unemployment Rate for Ages 25-65 | 3.63 |

**Table 40 - Labor Force**

**Data Source:** 2013-2017 ACS

| Occupations by Sector | Number of People |
|---|---|
| Management, business and financial | 2,930 |
| Farming, fisheries and forestry occupations | 335 |
| Service | 1,253 |
| Sales and office | 2,075 |
| Construction, extraction, maintenance and repair | 705 |
| Production, transportation and material moving | 245 |

**Table 41 – Occupations by Sector**

**Data Source:** 2013-2017 ACS

## Travel Time

| Travel Time | Number | Percentage |
|---|---|---|
| < 30 Minutes | 6,635 | 80% |
| 30-59 Minutes | 1,400 | 17% |
| 60 or More Minutes | 300 | 4% |
| ***Total*** | ***8,335*** | ***100%*** |

**Table 42 - Travel Time**

**Data Source:** 2013-2017 ACS

## Education:

Educational Attainment by Employment Status (Population 16 and Older)

| Educational Attainment | In Labor Force | | |
|---|---|---|---|
| | Civilian Employed | Unemployed | Not in Labor Force |
| Less than high school graduate | 185 | 0 | 100 |

| Educational Attainment | In Labor Force | | |
|---|---|---|---|
| | Civilian Employed | Unemployed | Not in Labor Force |
| High school graduate (includes equivalency) | 805 | 90 | 315 |
| Some college or Associate's degree | 2,065 | 105 | 900 |
| Bachelor's degree or higher | 4,470 | 185 | 1,255 |

**Table 43 - Educational Attainment by Employment Status**

**Data Source:** 2013-2017 ACS

Educational Attainment by Age

| | Age | | | | |
|---|---|---|---|---|---|
| | 18–24 yrs | 25–34 yrs | 35–44 yrs | 45–65 yrs | 65+ yrs |
| Less than 9th grade | | | | | |
| 9th to 12th grade, no diploma | | | | | |
| High school graduate, GED, or alternative | | | | | |
| Some college, no degree | | | | | |
| Associate’s degree | | | | | |
| Bachelor’s degree | | | | | |
| Graduate or professional degree | | | | | |

**Table 44 - Educational Attainment by Age**

**Data Source:** 2013-2017 ACS

Educational Attainment – Median Earnings in the Past 12 Months

| Educational Attainment | Median Earnings in the Past 12 Months |
|---|---|
| Less than high school graduate | 22,915 |
| High school graduate (includes equivalency) | 26,505 |
| Some college or Associate's degree | 24,355 |
| Bachelor's degree | 26,525 |
| Graduate or professional degree | 52,645 |

**Table 45 – Median Earnings in the Past 12 Months**

**Data Source:** 2013-2017 ACS

**Based on the Business Activity table above, what are the major employment sectors within your jurisdiction?**

The major employment sectors within the City of Ashland are (1) Arts, Entertainment, Accommodations; (2) Education and Healthcare Services; and (3) Retail Trade. shows employment and average annual pay by industry sector.

### Describe the workforce and infrastructure needs of the business community: Describe the workforce and infrastructure needs of the business community:

Some of Ashland's largest industry sectors are in the arts, education, health, and retail sectors. As housing costs in the city increase, it continues to be important to maintain housing affordability for employees in these dominant sectors who traditionally earn less than those in other industry sectors. Some professional employees like teachers, police and code enforcement officers, firefighters, EMTs, and medical technicians, earn more than median income for the area but still don't earn enough to afford to purchase a market rate home in Ashland.

### Describe any major changes that may have an economic impact, such as planned local or regional public or private sector investments or initiatives that have affected or may affect job and business growth opportunities during the planning period. Describe any needs for workforce development, business support or infrastructure these changes may create.

According to the City of Ashland's 2021-2040 Housing Capacity Analysis, Ashland's UGB is forecast to grow from 21,936 people in 2021 to 23,627 people in 2041, an increase of 1,691 people. The population is expected to grow at an average annual growth rate of 0.37%. To accommodate the city's forecasted population growth of 1,691 people, Ashland needs to plan for 858 new dwelling units between 2021 and 2041. About 300 units of new housing will be single-family detached (35%); 86 units of new housing will be single-family attached (10%); 172 units of new housing will be duplexes, triplexes, or quadplexes (20%); and about 300 units will be multifamily housing with five or more units per structure (35%).

Ashland's median household income was $50,613, in line with the County's median household income of $50,851. Approximately 26% of Ashland's households earn less than $25,000 per year, compared to 24% in Jackson County and 20% in Oregon. About 46% of Ashland's households were cost burdened, compared to the countywide average of 39%. About 63% of Ashland's renters are cost burdened and about 31% of homeowners were cost burdened. As pointed out previously, housing prices are increasing faster than incomes in Ashland and Jackson County, which is consistent with state and national challenges. The existing housing challenges were exacerbated by the Almeda fire, which burned from north Ashland to just south of Medford, destroying about 2,549 dwellings in September 2020. These losses increased the regional need for affordable housing and overall pressure on the Ashland housing market.

Demographic and economic trends will drive demand for affordable and diverse housing in Ashland. Key demographic and economic trends affecting Ashland's future housing needs are the aging of the baby boomers, the aging of the millennials and Generation Z, and the continued growth in Hispanic and Latino population. Baby boomers are expected to remain in their homes as long as possible but demand

for specialized senior housing, such as age-restricted housing or continuum of care housing, may grow in Ashland. The ability to attract millennials and Generation Z will depend on the City's availability of renter- and ownership-housing large enough to accommodate families while still being relatively affordable, as homeownership decline among Millennials and Generation Z may have more to do with financial barriers rather than the preference to rent. Traditionally Ashland's economy has been primarily based on tourism and service sector industries. These jobs tend to be entry level, or less than full time employment, and are sometimes seasonal.

### How do the skills and education of the current workforce correspond to employment opportunities in the jurisdiction?

The City of Ashland has a concentration of employment in the arts, accommodation, and retail sectors. In addition, the City has over 1,400 employees in the healthcare and social assistance fields. Many people commute from Ashland to work in Medford and other locations. For example, there are more residents employed in the Professional, Scientific, Management, Administrative Services, and Waste sectors than there are jobs within the City of Ashland.

### Describe any current workforce training initiatives, including those supported by Workforce Investment Boards, community colleges and other organizations. Describe how these efforts will support the jurisdiction's Consolidated Plan.

***WorkSource Rogue Valley, Jackson and Josephine Counties***: WorkSource Rogue Valley's mission is to provide individuals with comprehensive workforce development services that enable them to become skilled, productive workers in Jackson and Josephine Counties. WorkSource Rogue Valley is an integrated partnership of employment related organizations including the Oregon Employment Department, WorkSource Oregon and the organization formerly known as The Job Council. WorkSource Rogue Valley has offices located in Medford and Grants Pass that provide free job training and employment services to the public. WorkSource Rogue Valley also provides local employers with new employees and works with private employers to plan for future labor force needs. WorkSource Rogue Valley assists qualified youth, adults, welfare recipients, and laid-off workers in finding education, training, and employment that will lead to long-term self-sufficiency. WorkSource Rogue Valley also assists with school-to-work programs, including work experience, mentoring, and other programs that encourage youth to complete school and prepare for the work world. In addition, WorkSource Rogue Valley provides childcare referral services and childcare provider training to residents of the two counties through the Child Care Resource Network (CCRN). Service components provided by WorkSource Rogue Valley include the following: Assessment of Skills, Interests, Abilities; Support Services; Basic Education Skill Training; Vocational Skill Training; Work Experience; Life Skills/Work Ethics/ Work Maturity Training; Job Search Assistance; On-The-Job Training; On-site Computer Training; Child Care Provider Data Base; and Provider/Parent Training.

***Rogue Community College Workforce Training Program:*** RCC Workforce Training provides responsive, career-focused training for southern Oregon's citizens and businesses in order to develop a more

productive workforce to drive the region's economic engine and improve the quality of life among residents. Career-Focused Training includes customized training, commercial truck driving, landscape technology, short-term skills training, and apprenticeships.

### Does your jurisdiction participate in a Comprehensive Economic Development Strategy (CEDS)?

The City of Ashland completed a Comprehensive Plan with an economic chapter. The purpose of the economic portion of the Comprehensive Plan was to assure that the comprehensive plan and updated land-use code provide adequate opportunities for a variety of economic activities in the City of Ashland, while continuing to reaffirm the goal of Ashland's citizens as per the 1982 Comprehensive Plan: economic development should serve the purpose of maintaining or improving the local quality of life rather than become, of itself, the purpose of land-use planning.

### If so, what economic development initiatives are you undertaking that may be coordinated with the Consolidated Plan? If not, describe other local/regional plans or initiatives that impact economic growth.

The City Council adopted an Economic Development Strategy in 2011 and is currently in the process of developing a new economic development strategy. Previous economic development strategies included objectives such as, diversification of the economic base of the community, supporting the creation and growth of businesses and non-profit/public sector organizations that use and provide local and regional products, increasing the number of family-wage jobs in the community, and leveraging the strengths of Ashland's tourism and repeat visitors.

The City of Ashland collects a Transient Occupancy Tax from people who stay in overnight lodging within City limits. Over half (69%) of those funds are reserved for the City's General Fund and are used to support Police, Fire, Community Development, and Municipal Court. Slightly more than 30% of those funds are used to support the tourism industry, including supporting partnership efforts with Travel Ashland in support marketing to tourists. The remaining funds are dedicated to the City's grant program focused on reinvestment in tourist-related infrastructure and tourism drawing events. For many years the City has utilized this funding to provide economic, cultural and tourism grants, and in more recent years the City has provided grant funding to businesses in Ashland to encourage private investment in renovating and rehabilitating existing lodging and commercial properties within Ashland City limits.

### Discussion

The City of Ashland consolidated plan priorities address the economic development needs of the community and the strategies and priorities identified in the City's existing economic development plan through priorities such as job creation, increasing the number of family wage jobs (poverty reduction) and through the promotion of job and skills training. Similarly, the City prioritizes the use of CDBG funding to provide housing that is commensurate with the wage scale generated from a tourism based economy promoting both the strength of the tourism industry locally and reducing the transportation

costs both to families and the communities by expanding opportunities for workers to live in the community where they work.

## MA-50 Needs and Market Analysis Discussion

### Are there areas where households with multiple housing problems are concentrated? (include a definition of "concentration")

All census tracts have a high proportion of cost-burdened renters and owners, but Tract 19 has the largest proportion of homes built before 1980, cost-burdened renters, and cost-burdened owners. Census tracts 18, 19, 21, and 22 all have a concentration of cost-burdened renters.

| | Tract 18 | Tract 19 | Tract 20 | Tract 21 | Tract 22 |
|---|---|---|---|---|---|
| Built Before 1980 | 42% | 72% | 78% | 50% | 70% |
| Cost-Burdened Renters | 60% | 72% | 45% | 54% | 60% |
| Cost-Burdened Owners | 32% | 44% | 40% | 37% | 36% |
| Total Housing Units | 3,943 | 1,152 | 1,194 | 1,773 | 2,356 |

### Are there any areas in the jurisdiction where racial or ethnic minorities or low-income families are concentrated? (include a definition of "concentration")

The City does not have any areas of either low-income or minority concentrations, as defined by HUD:

- **Areas of low-income concentration** - a Census Block Group that is below 50% of the Area Median Income for the Metropolitan Statistical Area (MSA).
- **Areas of minority concentration** - the percentage of households in a particular racial or ethnic minority group is at least 20 percentage points higher than the percentage of that minority group for the housing market area or MSA; or the neighborhood's total percentage of minority persons is at least 20 percentage points higher than the total percentage of all minorities for the MSA as a or; in the case of a metropolitan area, the neighborhood's total percentage of minority persons exceeds 50% of its population.

### What are the characteristics of the market in these areas/neighborhoods?

The City of Ashland is a geographically small community, and while the City does have distinct neighborhoods, they tend to be fairly racially homogeneous as the Ashland community as a whole is relatively similar with regard to race and ethnicity. Census track 19 (shown in the % Non-White by Census Tract Map on page 30) which has the largest concentration of low-income households, also contains a large concentration of multi-family properties and is also near to the university.

### Are there any community assets in these areas/neighborhoods?

Not Applicable.

**Are there other strategic opportunities in any of these areas?**

Not Applicable.

## MA-60 Broadband Needs of Housing occupied by Low- and Moderate-Income Households - 91.210(a)(4), 91.310(a)(2)

### Describe the need for broadband wiring and connections for households, including low- and moderate-income households and neighborhoods.

Due to the number of providers within the City of Ashland, no households or neighborhoods experience a “digital divide”, which is defined as those who have ready access to computers and the internet and those who do not. The City’s internet service also offers discounted rates for those who qualify for the City’s reduced utility bill rate. Low income senior and disabled households qualify for a reduced utility bill rate.

### Describe the need for increased competition by having more than one broadband Internet service provider serve the jurisdiction.

The City of Ashland offers its own broadband internet service, Ashland Fiber Network, in addition to several private market providers. Consequently, the City of Ashland has more service providers for broadband internet service than most Cities in the United States.

## MA-65 Hazard Mitigation - 91.210(a)(5), 91.310(a)(3)

### Describe the jurisdiction's increased natural hazard risks associated with climate change.

The primary natural hazard risk associated with climate change in Ashland is the risk for wildfires in the areas surrounding the city.

### Describe the vulnerability to these risks of housing occupied by low- and moderate-income households based on an analysis of data, findings, and methods.

All housing, including housing occupied by low- and moderate-income households is vulnerable to the risk of wildfires. The City adopted a Climate Energy Action Plan in 2017. The plan outlines action steps and policy changes to mitigate the effects of climate change, including reducing the risk of wildfire hazards. The work of implementing the plan is ongoing.

# Strategic Plan

## SP-05 Overview

### Strategic Plan Overview

The Strategic Plan section that follows outlines the five-year goals and strategies that the City of Ashland plans to undertake with Community Development Block Grant Funds, City of Ashland general fund resources when appropriate, and through staff participation and resource leveraging in coordination with community partners and service providers.

## SP-10 Geographic Priorities – 91.215 (a)(1)

### Geographic Area

**Table 46 - Geographic Priority Areas**

### General Allocation Priorities

Describe the basis for allocating investments geographically within the jurisdiction (or within the EMSA for HOPWA) As mentioned elsewhere in this document, the City of Ashland is geographically small in area relative to other entitlement jurisdictions; consequently, the City does not prioritize funds to geographically specific areas within the City.

## SP-25 Priority Needs - 91.215(a)(2)

### Priority Needs

Priority Needs:

| Sort* | Need Name | Priority Level | Action |
|---|---|---|---|
| 1 | Housing Goals | High | View |
| 2 | Homeless Goals | High | View |
| 3 | Special Needs | Low | View |
| 4 | Public Infrastructure | Low | View |
| 5 | Economic Development Goals | Low | View |

**Table 47 – Priority Needs Summary**

### Narrative (Optional)

The strategies identified in the City's Consolidated Plan are based on conclusions drawn from the Needs Assessment and the Market Analysis sections of this Consolidated Plan and are informed by the community and provider outreach. Priority needs and outcomes in the strategic plan are based on an analysis of the City's attainment of goals and outcomes from the previous five years, the percentage of affordable units built, converted, or saved in relation to the total housing units built in the city overall, and on recent shifts in the economy, keeping in mind the shrinking availability of land suitable for the development of affordable housing.

The analysis of priority needs also looked at the various populations and the number of unmet needs for each, their ability to move toward self-sufficiency, and the availability of existing housing and resources to meet the needs of each population. Lastly, the City prioritized the needs of the most vulnerable populations, such as the elderly, frail elderly, and special needs populations due to a general lack of housing to meet their needs (often this population has the lowest incomes, or need special accommodations in housing such as ADA accommodations or supported living assistance) and due to these populations presumed income restraints.

## SP-30 Influence of Market Conditions – 91.215 (b)

### Influence of Market Conditions

| Affordable Housing Type | Market Characteristics that will influence the use of funds available for housing type |
|---|---|
| Tenant Based Rental Assistance (TBRA) | Not applicable in Ashland |
| TBRA for Non-Homeless Special Needs | Not applicable in Ashland |
| New Unit Production | This year the City is expecting to add between four and ten new units of affordable, the use of CDBG funds will be minimal or non-existent in these developments due to the added time and cost of meeting NEPA, Davis bacon, and public contracting requirements as well as a lack of funding. |
| Rehabilitation | Rehabilitation continues to be a viable use of CDBG funding for owner-occupied, single-family units as the City's existing housing stock tends to be older and more affordable/occupied by low- to moderate-income households. |
| Acquisition, including preservation | Acquisition and preservation activities tend to be minimal as all affordable multi-family housing stock is either already owned and managed by affordable housing providers or is in high demand due to high rents in the area. |

**Table 48 – Influence of Market Conditions**

## SP-35 Anticipated Resources - 91.215(a)(4), 91.220(c)(1,2)

### Introduction

### Anticipated Resources

| Program | Source of Funds | Uses of Funds | Expected Amount Available Year 1 | | | | Expected Amount Available Remainder of ConPlan $ | Narrative Description |
|---|---|---|---|---|---|---|---|---|
| | | | Annual Allocation: $ | Program Income: $ | Prior Year Resources: $ | Total: $ | | |
| | CDBG | Acquisition<br>Admin and Planning<br>Housing<br>Public Facilities Improvements<br>Public Services | 162,639 | 0 | 112,000 | | 813,195 | |

Table 49 - Anticipated Resources

### Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

In general City of Ashland grantees provide the matching funds from a variety of sources including state and private foundation grant funds, donations and fundraising activities. Grantees often cite CDBG as "first in" funds that help to raise additional resources; however, the City would still require the applicant to provide a 10% match to the amount of CDBG funds requested.

### If appropriate, describe publicly owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

Not applicable

### Discussion

## SP-40 Institutional Delivery Structure – 91.215(k)

Explain the institutional structure through which the jurisdiction will carry out its consolidated plan including private industry, non-profit organizations, and public institutions.

| Responsible Entity | Responsible Entity Type | Role | Geographic Area Served |
|---|---|---|---|
| City of Ashland | Government | Economic Development<br>Homelessness<br>Non-homeless special needs<br>neighborhood improvements<br>public facilities<br>public services | Jurisdiction |
| Jackson County | Government | Economic Development<br>Non-homeless special needs<br>Planning<br>neighborhood improvements<br>public facilities<br>public services | Region |
| Jackson County Continuum of Care | Continuum of care | Homelessness<br>Rental | Region |
| Housing Authority of Jackson County | PHA | Homelessness<br>Public Housing<br>Rental | Region |
| ACCESS | Non-profit organizations | Homelessness<br>Non-homeless special needs<br>Ownership<br>Rental<br>neighborhood improvements<br>public services | Region |

| Responsible Entity | Responsible Entity Type | Role | Geographic Area Served |
|---|---|---|---|
| United Way of Jackson County | Non-profit organizations | Homelessness<br>Non-homeless special needs<br>neighborhood improvements<br>public services | Region |
| NeighborWorks Umpqua | CBDO | Economic Development<br>Homelessness<br>Non-homeless special needs<br>Ownership<br>Public Housing<br>Rental<br>neighborhood improvements<br>public services | Region |
| Options for Helping Residents of Ashland | Non-profit organizations | Economic Development<br>Homelessness<br>Non-homeless special needs<br>Rental<br>public services | Jurisdiction |
| Ashland School District | Public institution | Homelessness<br>Non-homeless special needs<br>public facilities | Jurisdiction |
| Community Works, Inc. | Non-profit organizations | Homelessness<br>Non-homeless special needs<br>public services | Region |
| Maslow Project | Non-profit organizations | Homelessness | Region |
| Ashland Emergency Food Bank | Non-profit organizations | Non-homeless special needs<br>public services | Region |

| Responsible Entity | Responsible Entity Type | Role | Geographic Area Served |
|---|---|---|---|
| Living Opportunities, Inc. | Non-profit organizations | Non-homeless special needs<br>public services | Region |
| Community Health Center | Non-profit organizations | Non-homeless special needs | Region |
| Ashland Supportive Housing | Non-profit organizations | Non-homeless special needs<br>Rental<br>public services | Region |
| The Salvation Army | Community/Faith-based organization | Homelessness<br>Rental | Region |
| Pathway Enterprises, Inc. | Non-profit organizations | Non-homeless special needs | Region |
| Rogue Retreat | Non-profit organizations | Economic Development<br>Homelessness<br>Non-homeless special needs<br>Rental<br>neighborhood improvements<br>public services | Region |
| La Clinica | Non-profit organizations | Non-homeless special needs | Region |

**Table 50 - Institutional Delivery Structure**

## Assess of Strengths and Gaps in the Institutional Delivery System

Table 56 identifies the institutional structure and entities that are expected to be instrumental in implementing the priorities identified in the City of Ashland Consolidated Plan. At this time the City is unable to list all of the potential entities that may be involved in the delivery of funded projects, as some organizations have yet to be selected for funding in the coming five-year period; rather the City has identified the entities based on previous grantees and current organizations offering services within the community who present as potential future applicants. Some of the identified entities may be funded with City CDBG funding while others may receive funding through local, state or other federal sources only, or most likely a combination of all of the sources identified above. While others may not receive funding directly from the City but will coordinate or work collaboratively with the City to provide services or other programs/resources to City residents.

## Availability of services targeted to homeless persons and persons with HIV and mainstream services

| Homelessness Prevention Services | Available in the Community | Targeted to Homeless | Targeted to People with HIV |
|---|---|---|---|
| **Homelessness Prevention Services** | | | |
| Counseling/Advocacy | X | | |
| Legal Assistance | | | |
| Mortgage Assistance | | | |
| Rental Assistance | X | X | |
| Utilities Assistance | X | X | |
| **Street Outreach Services** | | | |
| Law Enforcement | X | | |
| Mobile Clinics | X | X | |
| Other Street Outreach Services | | | |
| **Supportive Services** | | | |
| Alcohol & Drug Abuse | | | |
| Child Care | X | | |
| Education | X | | |
| Employment and Employment Training | X | X | |
| Healthcare | X | X | |
| HIV/AIDS | X | | |
| Life Skills | | | |
| Mental Health Counseling | X | X | |
| Transportation | X | X | |
| **Other** | | | |
| Other | | | |

**Table 51 - Homeless Prevention Services Summary**

**Describe how the service delivery system including, but not limited to, the services listed above meet the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth)**

The institutional delivery system identified to carry out the goals and strategies identified in the 2025-2029 Consolidated plan have many strengths. First and foremost, among them is coordination and partnership. The challenges faced by all communities in meeting the housing and service needs of low- and moderate-income households and those with special needs are great, while funding for such activities continues to dwindle. Consequently, working collaboratively and maximizing community partnerships is often the only way that small communities can meet community needs. Similarly, the City of Ashland and many of its local providers of services have a strong and committed volunteer base which evaporated during the pandemic but is building up again. However, there are still several barriers to effectively serving homeless populations.

**Describe the strengths and gaps of the service delivery system for special needs population and persons experiencing homelessness, including, but not limited to, the services listed above**

As stated elsewhere in this document the greatest gap for the local service delivery system is for homeless populations. While the City now has more services for homeless populations than it did at any other time in its history there are still several gaps in services. Namely a lack of emergency shelter beds, and transitional and permanent supportive housing units to meet the level of need that exists in Ashland and in the County. In Ashland and throughout the County there is a critical need for emergency and long-term housing interventions and support such as funding to provide rental assistance, eviction prevention, security deposit assistance, and assistance with moving costs, housing navigation services and ongoing case management. Emergency hotel vouchers, which were more available during the pandemic, are still needed to address emergent short-term housing needs. Similarly, there continues to be a need for supportive services such as on-going case management, advocacy for homeless and special needs populations, assistance with transportation costs and basic needs such as food insecurity.

Some of the strengths of the existing service delivery system, reiterated from the paragraph above, include a strong dedicated volunteer base, good working relationships and partnerships with agencies and organizations that provide services to homeless and special needs populations. Lastly, Ashland has several organizations that serve special needs populations.

Oregon Housing and Community Services receives federal and state resources to be used to support services benefitting homeless populations. These funds include: Emergency Housing Account (EHA), Emergency Shelter Grants (ESG), State Homeless Assistance Program (SHAP), and the Housing Stabilization Program (HSP). Additionally, under the Federal Continuum of Care program administered by HUD, local governments and agencies can apply for federal funding for programs and services to prevent and combat homelessness. The Jackson County Continuum of Care is an annual recipient of HUD funding. The City of Ashland does not directly receive any funds to assist homeless people or people at risk of becoming homeless from HUD through the Continuum of Care, however organizations that serve homeless and at-risk populations in Ashland are eligible to receive Continuum of Care grant funds.

Opportunities for Housing Resources and Assistance has grown significantly since that organization was first established in 2012. The City of Ashland and OHRA have worked closely together and over the years the City has provided financial support through direct funding, of Social Service grants, affordable housing trust funds and CDBG funding. OHRA provides a wide variety of resources including essential services such as computer access and vital document replacement, resource referrals, employment and housing supports, a shower facility with laundry and bathroom access, and a space for service providers who do not currently have locations within the City to meet with clients locally. OHRA owns and manages a comprehensive shelter program which includes case management and housing navigation. City of Ashland residents can also access available services, programs, and funds through ACCESS, Inc. the regional CAP agency that serves Jackson and Josephine Counties. Similarly, many non-

profit agencies that provide housing or support services for homeless populations are eligible to apply for funds through Oregon Housing and Community Services or through the Jackson County Continuum of Care.

### Provide a summary of the strategy for overcoming gaps in the institutional structure and service delivery system for carrying out a strategy to address priority needs

To summarize the City's primary strategy for overcoming the gaps in the institutional structure and service delivery system for carrying out identifies strategies to address the priority needs of special needs and homeless populations; the City prioritizes activities that address these identified deficiency, such as the acquisition and/or development of housing targeted to low- and moderate-income households, services to homeless populations, and services to those experiencing mental illness or drug and alcohol addiction and or both (dual-diagnosis). Furthermore, the City is committed to continuing involvement with regional planning groups such as the Jackson County Continuum of Care, the Jackson County Homeless Task Force, and the City of Medford to better coordinate services and leverage resources across the region.

## SP-45 Goals Summary – 91.215(a)(4)

**Goals Summary Information**

| Sort Order | Goal Name | Start Year | End Year | Category | Geographic Area | Needs Addressed | Funding | Goal Outcome Indicator |
|---|---|---|---|---|---|---|---|---|
| **1** | Housing Goals | 2025 | 2030 | Affordable Housing | | | | Rental units constructed:<br>15 Household Housing Unit<br><br>Homeowner Housing Rehabilitated:<br>15 Household Housing Unit |
| **2** | Homeless Goals | 2025 | 2030 | Homeless | | | | Public service activities other than Low/Moderate Income Housing Benefit:<br>100 Persons Assisted<br><br>Public service activities for Low/Moderate Income Housing Benefit:<br>50 Households Assisted<br><br>Homeless Person Overnight Shelter:<br>50 Persons Assisted<br><br>Overnight/Emergency Shelter/Transitional Housing Beds added:<br>50 Beds<br><br>Homelessness Prevention:<br>50 Persons Assisted<br><br>Housing for Homeless added:<br>5 Household Housing Unit |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **3** | Special Needs Goal | 2025 | 2030 | Non-Homeless Special Needs | | | | Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted<br><br>Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit: 5 Households Assisted<br><br>Public service activities other than Low/Moderate Income Housing Benefit: 25 Persons Assisted |
| **4** | Public Infrastructure Goals: | 2025 | 2030 | Non-Housing Community Development | | | | Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted<br><br>Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit: 5 Households Assisted |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **5** | Economic Development Goals: | 2025 | 2030 | Non-Homeless Special Needs Non-Housing Community Development | | | | Public service activities other than Low/Moderate Income Housing Benefit: 5 Persons Assisted<br><br>Jobs created/retained: 5 Jobs |

**Table 52 – Goals Summary**

## Goal Descriptions

| | | |
|---|---|---|
| **1** | **Goal Name** | Housing Goals |
| | **Goal Description** | Access to Housing units that are affordable and suitable to low-, and moderate-income and special needs households continues to be a priority identified through the consolidated planning process. Consequently, the City is continuing to identify the goal of developing and maintaining affordable housing as the highest priority use of CDBG funds. Furthermore, in recognition of the City's aging population the City would has also included the priority of funding to projects and activities which provide and/or incentivize remodeling and rehabilitation to new and existing owner and rental properties that promote ADA accessibility, architectural barrier removal and other modifications and improvements that increase the supply of housing suitable for all ages and abilities. Encourage projects that promote Accessibility/lifelong livability. The City of Ashland has adopted a Climate Energy Action Plan (CEAP), which, among other things, seeks to expand participation in energy efficiency programs and promote climate-friendly practices in building and construction. In consideration of the policies contained in CEAP, housing projects supported with Community Development Block Grant Funding will be assessed for consistency with the policies contained in that document. The City will strongly encourage projects that promote CEAP goals through funding prioritization. |

| | | |
|---|---|---|
| 2 | **Goal Name** | Homeless Goals |
| | **Goal Description** | The City has been making headway with providing resources and services to assist those populations experiencing housing instability and homelessness. Goals set in the 2020-2024 Consolidated Plan were met and exceeded each program year, yet the issues and problems of homelessness continue to persist within the community. The City, partner agencies, and community volunteers have made huge strides in creating more resources and better access to existing resources for homeless and at-risk populations, but these efforts must be continued and expanded in order to meet the continuing need. Consequently, the City is continuing the high priority designation of activities which provide resources or services to homeless populations. |
| 3 | **Goal Name** | Special Needs Goal |
| | **Goal Description** | The City has utilized CDBG funding to support a variety of activities to support special needs populations. The inclusion of diversity of incomes, ethnicities and abilities makes the community stronger, and the City of Ashland wants to maintain that tradition of inclusion. Prioritizing the needs of special needs citizens will continue to be a priority for the use of CDBG funding over the next five-year period. |
| 4 | **Goal Name** | Public Infrastructure Goals: |
| | **Goal Description** | Citizen Input identified the need for transportation options. The City of Ashland values multi-modal transportation options and continues to prioritize activities which improve safety and access of public infrastructure for all Ashland residents. |
| 5 | **Goal Name** | Economic Development Goals: |
| | **Goal Description** | In recognition of the intrinsic link between employment, housing stability and general wellbeing the City has identified the priority of services that assist and/or promote increased access to economic opportunities through job or work skills training, employment supports such as job search skills and work readiness training and access to micro-enterprise funding. |

**Estimate the number of extremely low-income, low-income, and moderate-income families to whom the jurisdiction will provide affordable housing as defined by HOME 91.315(b)(2)**

The City does not receive funding from the HOME program.

## SP-50 Public Housing Accessibility and Involvement – 91.215(c)

### Need to Increase the Number of Accessible Units (if Required by a Section 504 Voluntary Compliance Agreement)

The Housing Authority of Jackson County is the Public Housing Authority that serves all of Jackson County. Currently HAJC does not own or operate any public housing units in Jackson County. Consequently, no actions are needed to address that public housing.

### Activities to Increase Resident Involvements

Not Applicable

### Is the public housing agency designated as troubled under 24 CFR part 902?

No

### Plan to remove the 'troubled' designation

Not Applicable

## SP-55 Barriers to affordable housing – 91.215(h)

### Barriers to Affordable Housing

Over the years that City has spent considerable resources identifying and working to remove or mitigate barriers to the development of affordable housing. As with the housing market, barriers to affordable housing development are an ever-changing target and consequently require ongoing work to identify and remediate.

### Strategy to Remove or Ameliorate the Barriers to Affordable Housing

Over the years the city has explored many strategies and taken several steps to reduce the barriers identified above. Some of these actions include allowing Accessory Residential Units without a land use process, removing barriers to the placement and inclusion of Manufactured Housing within Single Family zones, and evaluating further land use incentives to promote the development of affordable single family and multi-family development. These land use incentives include the cottage housing ordinance, the transit triangle project, and the Accessory Dwelling Unit program.

Some of the barriers to affordable housing identified previously, also serve as barriers to addressing impediments to fair housing choice. Primarily the lack of multi-family inventory which tends to concentrate low-income and/or minority populations in the areas of town which contain the largest supply of multi-family and rental housing, which also happens to be the census block groups near the university. The City is committed to following HUD guidance regarding fair housing implementation. The City also regularly contracts with the Fair Housing Council of Oregon to provide ongoing fair housing education, outreach, and training to citizens, elected and appointed officials and other populations as identified.

Education and Outreach is a significant role of the Housing and Human Services Advisory Committee and such activities often have the benefit of not just disseminating information, but collecting information as well. Such a dialogue within the City facilitates an awareness of the barriers to affordable housing and highlights mechanisms available to address such barriers. In the last few years, the Housing and Human Services Advisory Committee has undertaken several activities, which addressed some aspects of this goal. These activities include hosting housing and community resource fairs, and conducting extensive community engagement activities to gain a better understanding of the gaps and needs of various populations within the Ashland Community. The HHSAC works to identify strategies for addressing the ongoing affordable housing crisis in Ashland.

#### Housing and Human Services Advisory Committee

In 1996, the City established a commission to focus specifically on issues of housing. The Ashland Housing Commission was tasked with encouraging housing that is available and affordable to a wider range of city residents, to enhance cooperation between the public and private sectors, to encouraging financial entities to support housing programs in the city, and to coordinating housing and supportive

services programs. In 2014 the Ashland City Council created a new commission, the Housing and Human Services Advisory Committee, in recognition that housing issues and human service issues are often intertwined. The Housing and Human Services Advisory Committee continues the mission and goals of the Housing Commission but also oversees the broader continuum of housing and service needs for vulnerable and at-risk populations, such as homeless and special needs populations, and must consider the service needs of such populations along with and in relation to their housing needs.

**Land Use Regulations**

Several land use regulations have been amended or created to promote the development and retention of affordable housing types. Examples of this are the Annexation and Zone change ordinances which require a percentage of affordable housing be provided for developments which are seeking to become annexed into the city or which are requesting a zone change to a higher density to facilitate the development. Similarly, the Condominium conversion which was amended in 2007 requires that a percentage of units in a multi-family property be designated as affordable if certain circumstances apply.

Potential approaches that have been identified (some of which have been enacted or are in the process of being enacted) to help ameliorate barriers to affordable housing are listed below;

- Increase the land supply
- Consider restriction uses in certain zones to apartments
- Encourage more affordable single-family housing types-like small housing on small lots
- Make more land available for manufactured housing
- Develop more government-assisted housing.
- Reduce development fees for low-income projects.
- Consider incentives to promote housing over commercial developments

## SP-60 Homelessness Strategy – 91.215(d)

### Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The Jackson County Continuum of Care (CoC) is the coordinating body for planning and coordinating homeless activities throughout Jackson County. Access is the lead agency for the HMIS system and the Continuum of Care grant application process. In 2009 Jackson County's board of Commissioners adopted the 10-year plan to end homelessness, a strategic plan to comprehensively address homelessness on a regional level that was developed by the HTF. In 2024 the CoC adopted an updated board charter, and in 2025 the CoC board adopted a new strategic plan.

Several members of the CoC board and the CoC general membership conduct outreach to homeless populations and populations at risk of homelessness as a regular part of the programs and services they offer. The CoC board also conducts the annual Point in Time Count, which is another way to gather information about the needs of homeless individuals and families.

### Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again.

The City has prioritized the use of CDBG funds to support activities which promote the transition from homelessness to housing stability in a variety of ways including; providing more affordable housing to alleviate housing cost burden which can lead to housing instability. The provision of services such as employment supports and life skills training to promote employment opportunities and to help ease the transition from homelessness to stably housed for chronically homeless populations or populations with special needs and/or mental illness are also a priority for CDBG funding. Within the community, Ashland provides funding through the general fund to OHRA, which offers employment supports, laundry shower services, and housing navigation as well as providing space for partner organizations to meet with clients, both Maslow Project and St. Vincent De Paul, who are both CDBG grantees, work with OHRA to streamline services to homeless and at-risk populations. In recent years, OHRA has partnered with La Clinica, to open a small clinic in the shelter building to better provide mental and physical health care access to residents of the shelter as well as community members who come to the OHRA Resource Center for resources and services.

### Help low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families who are likely to become homeless after being discharged from a publicly funded institution or system of care, or who are receiving

**assistance from public and private agencies that address housing, health, social services, employment, education or youth needs**

It is a priority of the CoC board to ensure that discharge planning for those transitioning back into the community is taking place in the community. To this end the Jackson County Continuum of Care board has representation from law enforcement, mental health institutions, health service providers, and the Department of Human Services. There are new resources within the community, in terms of programming, funding and capacity, to accomplish these goals. More robust programming around rapid rehousing and connecting homeless and individuals transitioning from institutions with resources to address substance use disorder and co-occurring disorders. Similarly, the City has allocated CDBG funding in prior years to activities which promote housing stability for low-income and at-risk populations to avoid homelessness. The City has identified a goal and an outcome for the continued use of program funds to aid in efforts to avoid homelessness.

## SP-65 Lead based paint Hazards – 91.215(i)

### Actions to address LBP hazards and increase access to housing without LBP hazards

The primary actions the City uses to address LBP hazards in buildings built prior to 1979, and to increase access to housing units that are free of LPB hazards will be the delivery of housing rehabilitation loans and grants, including energy efficiency activities. These activities will be carried out in accordance with state and federal regulations as they relate to LBP. When the opportunity arises the City will provide education and outreach activities to inform program participants and the public in general about potential health impacts of lead-based paint, and about how to best prevent them.

### How are the actions listed above related to the extent of lead poisoning and hazards?

The age of the housing unit is a leading indicator of the presence of lead hazard, along with building maintenance. Lead was banned from residential paint in 1978. Of the 10,373 total housing units in the City of Ashland 68% (7,000) were built prior to 1980. The 1999 national survey found that 67% of housing built before 1940 had significant LBP hazards. This declined to 51% of houses built between 1940 and 1959, 10% of houses built between 1960 and 1977 and just 1% after that. Based on those estimates, over 3,300 homes pose potential lead-based paint hazards in Ashland. However, the Clickner study also noted that there were regional differences in the probability of a hazard; the risk was more prevalent on the east coast (43%) than on the west coast (19%).

### How are the actions listed above integrated into housing policies and procedures?

The Housing Authority of Jackson County has several lead-based paint risk assessors and inspectors on staff. The Housing Authority periodically hosts the “Working Safe with Lead” training that certifies contractors in lead safe work practices by teaching them how to reduce the risk of hazards to the workers and to occupants by mitigating contamination by lead dust and construction debris. The Housing Authority and the U.S. Department of Agriculture’s Rural Development offer Housing Rehabilitation and Repair programs to homeowners in the City of Ashland, both of these programs work to mitigate or abate lead hazards when completing needed home repairs and offer the participants the pamphlet “Lead hazards in your home”. All of these programs work to educate the community about the health hazards that lead contamination pose to children and pregnant women.

The City of Ashland will review all projects funded with CDBG dollars to determine if the lead-based paint regulations apply. Prior to the execution of a subrecipient agreement, City staff will inform participants of projects covered by the regulation of their responsibilities and work with the subrecipient to ensure compliance.

| Date Built | Total Units | Potential Hazards | |
|---|---|---|---|
| | | % | Number |
| Before 1940 | 1,385 | 67 | 928 |

| | | | |
|---|---|---|---|
| 1940-1959 | 1,528 | 51% | 779 |
| 1960-1979 | 2,840 | 10% | 284 |
| 1980-2000 | 3,318 | 1% | 33 |
| 2000-2004 | 940 | 1% | 9 |
| After 2005 | 406 | 1% | 4 |
| Total | | | 2,037 |

**Table 53 - Potential Lead-Based Paint (LBP) Hazards in Ashland**

## SP-70 Anti-Poverty Strategy – 91.215(j)

### Jurisdiction Goals, Programs and Policies for reducing the number of Poverty-Level Families

The Housing and Community Development Act of 1992 requires communities to include in their Consolidated Plan a description of an anti-poverty strategy. This strategy takes into consideration factors over which the City has control. The City of Ashland has limited resources for addressing the issues involved in reducing poverty and improving the self-sufficiency of low-income residents. Affordable housing is one of the factors directly related to poverty that the City of Ashland does have some ability to influence. In addition, the City supports housing, social service, and economic development programs targeted at the continuum of care needs of the homeless.

The City has identified several goals in the five-year strategic plan to reduce the number of families and individuals in poverty within the City of Ashland. The City has prioritized activities that; support organizations that provide job training and access to employment, promote and support activities within the community, that improve or provide access to economic opportunities for extremely low- and low-income residents, and the development, maintenance, and retention of affordable housing units targeted to the lowest incomes, as well as support services that integrates elements of life skills training, employment training, and other benefits that promote self-sufficiency.

### How are the Jurisdiction poverty reducing goals, programs, and policies coordinated with this affordable housing plan

The City works to support and coordinate with community partners toward poverty reduction. The City supports a staff member within the planning department that offers resource referrals to assist residents with a variety of housing and service needs. The City also has its own small affordable housing program,

**Individual Development Account Programs**

The City provides education about and referrals to programs that assist individuals living at or below the poverty level in building stability and assets, such as Individual Development Accounts (IDA's) that promote homeownership, further education, and promote micro-enterprise. The Housing Authority of Jackson County's Family Self-Sufficiency Program offers an IDA program to individuals and families who reside in public housing and/or receive Section 8/Housing Choice Voucher assistance. ACCESS, Neighborworks Umpqua, and Habitat for Humanity Rogue Valley also offer IDA programs and homebuyer education.

**HAJC**

The City has prioritized support for activities undertaken by the Housing Authority of Jackson County (HAJC). Activities undertaken by HAJC often incorporate benefits that promote self-sufficiency, such as the Family Self-sufficiency program mentioned previously. Similarly, housing authority developments

offer such assistance benefits as computer classes, resource referrals, and in some instances free or reduced memberships to the local YMCA.

**City of Ashland Living Wage Ordinance**

The City adopted a Living Wage Ordinance in 2001 that stipulated that all employees, contractors, or recipients of city grants or funds must meet minimum living wage requirements adjusted annually to the Consumer Price Index. The Living wage ordinance continues to provide the benefits of a higher wage scale for all people working to provide the City with services, or working on City funded projects. The City of Ashland recently added the position of Economic Development coordinator to increase the number of living wage jobs located within the city by promoting the expansion, retention and relocation of local and national businesses.

**Ashland Low-Income Energy Assistance Program (ALIEAP)**

As the City of Ashland owns and operates the Electric Utility, the City is in the unique position to assist very-low income households in meeting their energy needs, specifically during the winter months when energy costs and use are highest. To this end the City targets assistance to Low-income Ashland utility customers who need help to pay their heating bills over the course of each winter. Applicants must have an active electric utility account with the City and the Applicant's household income may not exceed 125% of the Federal Poverty Guidelines. On average the City provides assistance to approximately 250 extremely low-, low- and moderate-income individuals annually, providing over $100,000 in assistance from our Utility funds. Similarly, the City provides utility discounts to seniors and the disabled, assisting approximately 275 special needs residents providing over $100,000 to these residents.

## SP-80 Monitoring – 91.230

### Describe the standards and procedures that the jurisdiction will use to monitor activities carried out in furtherance of the plan and will use to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

The Community Development Block Grant (CDBG) program requires that recipients of federal funds are monitored to provide information about the program effectiveness, management efficiency, as well as identifying instances of fraud, waste, and abuse. To this end the City shall conduct a Risk Analysis to estimate the level of risk associated with each project. This analysis will allow the City to best allocate limited staff time to regularly monitor subrecipients. Participants in the CDBG program will be rated and a "risk profile" is to be established to summarize specific risks associated with a subrecipient or particular project, as well as establishing the monitoring objectives.

*The HUD Monitoring Desk Guide, Policies and Procedures for Program Oversight* is a guide produced by the Department of Housing and Urban Development provides the basis for the City's monitoring practices. This document, and the following outlined procedures, provides the methodology for conducting on-site and desk reviews of activities to ensure they are carried out in compliance with CDBG requirements.

The evaluation criteria to be applied in evaluating the potential of risk include the following.

- Financial management: The extent to which program participants account for and manage financial resources in accordance with approved financial management standards. Additionally, this criterion relates to the amount of potential monetary exposure to the City, and the Department of Housing and Urban Development. Analysis to include assessment of:
    - Amount of current/total funding obligated and/or expended
    - Audits and/or Investigations
    - Staff experience with CDBG
    - History of performance

- Physical asset maintenance and operation: The extent to which HUD-funded physical assets are maintained and operated. Analysis to include assessment of:
    - History of Performance
    - Condition of HUD funded physical assets
    - Use of facilities or physical assets in conformance with CDBG regulations
- Management: The extent to which the program participant has the administrative capacity to carry out CDBG requirements. Analysis to include assessment of:
    - Experience level of Key staff particularly as it relates to CDBG funded activities
    - Program History including performance indicators
    - Reporting consistency

- Satisfaction: Extent to which client's express satisfaction or dissatisfaction with the delivery of the program services. Analysis to include assessment of:
  - Types of program activities
  - Complaints or compliments received

- Services: Extent to which HUD program participants effectively and efficiently deliver services to the intended beneficiaries/clientele. Analysis to include assessment of:
  - Types of program activities
  - Accomplishments
  - Timeliness
  - Project development including timing benchmarks

The City shall review each CDBG activity and rank the subrecipients risk factor by assigning recommended points for each of the rating criteria on the form provided. The designated points on the rating form are established to prove a means of quantifying a Risk Factor and are useful as tool in determining the extent of monitoring for a given activity. Other factors, as deemed relevant by the City of Ashland, can be used in establishing a higher or lower risk factor than the numerical rating system. In the event City Staff changes a risk factor, a detailed explanation will be provided justifying the modification.

A *Risk Analysis* shall be conducted yearly for each activity funded in whole, or in part, with CDBG funds. Upon completion of the risk analysis an annual monitoring strategy will be developed. This strategy will outline the number of program participants that will be monitored during the fiscal year, the monitoring approach (comprehensive vs. focused and on-site vs. remote), and the timeframes within which monitoring should be completed, and a determination of which programs or participants provide the most significant risk.

The monitoring approach for each participant is dependent upon the nature of risk, the type of project, and the relative ability to collect the pertinent information.

*5 Year Strategic Monitoring Response: Each* Community Development Block Grant (CDBG) Program Year the City reviews each CDBG activity that was underway and ranks the sub-recipient's risk factors by assigning points for each of the rating criteria. The designated points on the rating form are established to prove a means of quantifying a Risk Factor and are useful as tools in determining the extent of monitoring for a given activity. Other factors, as deemed relevant by the City of Ashland, can be used in establishing a higher or lower risk factor than the numerical rating system. A CDBG monitoring visit may consist of on-site monitoring or a desk monitoring. All CDBG grantees will be monitored once prior to a contract being administratively closed. The areas monitored may include:

The CDBG staff objectives for monitoring are to determine if grantees are:

- Carrying out their CDBG-funded activities as described in their contracts (as modified or amended);

- Carrying out the program or project in a timely manner in accordance with the scheduled included in the CDBG contract;
- Charging costs to the program or project which are eligible under applicable regulations;
- Complying with other applicable laws, regulations and terms of the CDBG contract;
- Conducting the program in a manner which minimizes the opportunity for fraud, waste and mismanagement; and
- Have a continuing capacity to carry out the approved program or project.
- Overall management system, record keeping and progress in activities.

When a grantee is found to be out of compliance, CDBG staff will identify a specific period of time in which compliance should be achieved. Usually, the grantee will have 30 days to correct deficiencies. Copies of supporting documentation demonstrate that corrective action has been taken will be required. Additional time for corrective action may be allowed on a case-by-case basis. Failure by the grantee to correct deficiencies may result in funds being withheld and possible restrictions on future grants.

# Expected Resources

## AP-15 Expected Resources – 91.220(c)(1,2)

### Introduction

The City of Ashland has a very small allocation of CDBG funding. The City's annual allocation often includes a carried over balance from prior years unallocated funds.

### Anticipated Resources

| Program | Source of Funds | Uses of Funds | Expected Amount Available Year 1 | | | | Expected Amount Available Remainder of ConPlan $ | Narrative Description |
|---|---|---|---|---|---|---|---|---|
| | | | Annual Allocation: $ | Program Income: $ | Prior Year Resources: $ | Total: $ | | |
| | | | | | | | | |

**Table 54 - Expected Resources – Priority Table**

### Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

In general the City of Ashland grantees provide the matching funds from a variety of sources including state and private foundation grant funds, donations and fundraising activities. Grantees often cite CDBG as “first in” funds that help to raise additional resources; however, the City would still require the applicant to provide a 10% match to the amount of CDBG funds requested.

**If appropriate, describe publicly owned land or property located within the jurisdiction that may be used to address the needs identified in the plan**

Not applicable

**Discussion**

# Annual Goals and Objectives

## AP-20 Annual Goals and Objectives

### Goals Summary Information

| Sort Order | Goal Name | Start Year | End Year | Category | Geographic Area | Needs Addressed | Funding | Goal Outcome Indicator |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |

**Table 55 – Goals Summary**

### Goal Descriptions

| Goal Name | Goal Description |
|---|---|
| <TYPE=[pivot_table] REPORT_GUID=[8259A9F3469186F518038A8E2F9CBDBA]> | |
| | |

# Projects

## AP-35 Projects – 91.220(d)

### Introduction

### Projects

| # | Project Name |
|---|---|
| | |

**Table 56 – Project Information**

### Describe the reasons for allocation priorities and any obstacles to addressing underserved needs

## AP-38 Project Summary

### Project Summary Information

| Project Name | Target Area | Goals Supported | Needs Addressed | Funding | Description | Target Date | Est nu of wil the act |
|---|---|---|---|---|---|---|---|
| <TYPE=[pivot_table] REPORT_GUID=[54A4ED67473EDAEE248792836A1D83B0]> | | | | | | | |
| | | | | | | | |



OMB Control No: 2506-0117 (exp. 09/30/2021)

## AP-50 Geographic Distribution – 91.220(f)

### Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

### Geographic Distribution

| Target Area | Percentage of Funds |
|---|---|
| | |

**Table 57 - Geographic Distribution**

### Rationale for the priorities for allocating investments geographically

### Discussion

# Affordable Housing

## AP-55 Affordable Housing – 91.220(g)

### Introduction

| One Year Goals for the Number of Households to be Supported |
|---|
| Homeless |
| Non-Homeless |
| Special-Needs |
| Total |

**Table 58 - One Year Goals for Affordable Housing by Support Requirement**

| One Year Goals for the Number of Households Supported Through |
|---|
| Rental Assistance |
| The Production of New Units |
| Rehab of Existing Units |
| Acquisition of Existing Units |
| Total |

**Table 59 - One Year Goals for Affordable Housing by Support Type**

### Discussion

## AP-60 Public Housing – 91.220(h)

### Introduction

### Actions planned during the next year to address the needs to public housing

### Actions to encourage public housing residents to become more involved in management and participate in homeownership

### If the PHA is designated as troubled, describe the manner in which financial assistance will be provided or other assistance

### Discussion

## AP-65 Homeless and Other Special Needs Activities – 91.220(i)

**Introduction**

**Describe the jurisdictions one-year goals and actions for reducing and ending homelessness including**

**Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs**

**Addressing the emergency shelter and transitional housing needs of homeless persons**

**Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again**

**Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs**

**Discussion**

## AP-75 Barriers to affordable housing – 91.220(j)

**Introduction:**

**Actions it planned to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment**

**Discussion:**

## AP-85 Other Actions – 91.220(k)

**Introduction:**

**Actions planned to address obstacles to meeting underserved needs**

**Actions planned to foster and maintain affordable housing**

**Actions planned to reduce lead-based paint hazards**

**Actions planned to reduce the number of poverty-level families**

**Actions planned to develop institutional structure**

**Actions planned to enhance coordination between public and private housing and social service agencies**

**Discussion:**

# Program Specific Requirements

## AP-90 Program Specific Requirements – 91.220(l)(1,2,4)

**Introduction:**

**Community Development Block Grant Program (CDBG)**
**Reference 24 CFR 91.220(l)(1)**

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed
2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan
3. The amount of surplus funds from urban renewal settlements
4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan.
5. The amount of income from float-funded activities

Total Program Income

**Other CDBG Requirements**

1. The amount of urgent need activities

1. If applicable to a planned HOME TBRA activity, a description of the preference for persons with special needs or disabilities. (See 24 CFR 92.209(c)(2)(i) and CFR 91.220(l)(2)(vii)). *<TYPE=[text] REPORT_GUID=[A0BBB986408D8C25582AC4BE59FA99C5]>*

## Appendix - Alternate/Local Data Sources

| Sort order | Type | Data Source Name | List the name of the organization or individual who originated the data set. | Provide a brief summary of the data set. | What was the purpose for developing this data set? | Provide the year (and optionally month, or month and day) for when the data was collected. | Briefly describe the methodology for the data collection. | Describe the total population from which the sample was taken. | Describe the demographics of the respondents or characteristics of the unit of measure, and the number of respondents or units surveyed. | How comprehensive is the coverage of this administrative data? Is data collection concentrated in one geographic area or among a certain population? | What time period (provide the year, and optionally month, or month and day) is covered by this data set? | What is the status of the data set (complete, in progress, or planned)? |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| <TYPE=[pivot_table] VERSION=[2] REPORT_GUID=[884DC1E44796F035A521FE96F1A3ABF2]> | | | | | | | | | | | | |
| | | | | | | | | | | | | |

# Council Business Meeting

**Date**: April 15, 2025

| | |
|---|---|
| **Agenda Item** | Second Reading of Ordinance 3259: "An Ordinance Annexing Property and Withdrawing an Annexed Area from Jackson County Fire District No. 5 (300 Clay Street)" and adoption of Findings and Conclusions of Law for Planning Action #PA-T3-2024-00010. |
| **From** | Brandon Goldman, Director of Community Development, Aaron Anderson |
| **Contact** | brandon.goldman@ashland.or.us |

**SUMMARY**

A request for annexation and zone change of a 4.8-acre property and 0.45 acres of adjacent Right of Way. The application also includes a request for Outline Plan approval for a Performance Standards Option (PSO) subdivision.

On April 1st City Council approved first reading of Ordinance 3259 as presented without amendment, and directed staff to prepare Council findings and conclusions of law approving planning action #PA-T3-2024-00010 reflecting the approval of Outline Plan and the exception to the standard for bedroom mix at AMC 18.5.8.050.G3.

**POLICIES, PLANS & GOALS SUPPORTED**

- The Adopted Housing Production Strategy
- The Ashland Land Use Ordinance: Annexation 18.5.8
- The Ashland Comprehensive Plan Section VI: Housing
  - 6.10.01 Goal : Ensure a range of different dwelling types that provide living opportunities for the total cross section of Ashland's population.
  - 6.10 Policies: Provide for a mix of housing types that are attractive and affordable to a diversity of ages, incomes, household sizes, and household types.
- The Ashland Comprehensive Plan Section XII: Urbanization
  - 12.09 Goal : It is the City of Ashland's goal to maintain a compact urban form and to include and adequate supply of vacant land in the City so as not to hinder natural market forces within the City, and to ensure and orderly and sequential development of land in the City limits.
  - 12.10 Policies: The City shall incorporate vacant land only after a showing that land of similar qualities does not already exist in the City limits, or if annexation is necessary to alleviate a probable public health hazard.

**BACKGROUND AND ADDITIONAL INFORMATION**

The annexation of the 4.8-acre property at 300 Clay Street, along with 0.45 acres of adjacent right-of-way, has undergone a public review and legislative process consistent with the Ashland Land Use Ordinance and Comprehensive Plan goals. The proposal includes a 29-lot (37-unit) Performance Standards Option subdivision and a request for a limited activities permit for utility improvements within the Water Resource Protection Zone. The Planning Commission held public hearings on February 11 and March 11, 2025, and ultimately issued a recommendation for City Council approval of the annexation, while conditionally approving the Outline Plan subdivision.

On April 1, 2025, the City Council considered the full application and granted approval of the annexation, Outline Plan, and the requested exceptions. Council's direction acknowledged that the applicant's phasing plan—wherein all eight affordable housing units would be constructed first—adequately demonstrated a timely commitment to affordable housing development, satisfying the exception criteria in AMC 18.5.8.050.G. The Council concluded that the deviation from a directly comparable bedroom mix was justified by the early delivery of affordable units and the resulting benefit to the community. Accordingly, the Council approved the first reading of Ordinance No.

3259 annexing the property and withdrawing it from Jackson County Fire District No. 5, while directing staff to prepare final findings reflecting the approval of the exception and overall application as proposed.

The Council's Findings and Conclusions of Law, provided as an attachment for consideration, incorporate the Planning Commission's findings and conditions of approval, except for the condition related to the affordable housing bedroom mix, which was modified per Council direction.

The full Planning Action record for the annexation and Outline Plan application—including the applicant submittals, public comments received, and the Staff Report—was presented to the City Council on April 1, 2025, and is available online at https://ashlandor.portal.civicclerk.com/event/792/overview.

## FISCAL IMPACTS

The proposed annexation has no immediate fiscal impact, but the inclusion of the property within city limits will require police, fire, and city utility services. As the property develops, it will add at least 21 homes and 16 multifamily dwellings to the property tax revenue.

## SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move to approve Second Reading of Ordinance no. 3259, an ordinance annexing property and withdrawing an annexed area from Jackson County Fire District no. 5 and approving findings for planning action #PA-T3-2024-00010.

## REFERENCES & ATTACHMENTS

1. Clay_300_ORD3259
2. Clay_300_ORD3259_Exhibits_A&B
3. Clay_300_PA-T3-2024-00010_CouncilFin_041525

# ORDINANCE NO. 3259

## AN ORDINANCE ANNEXING PROPERTY AND WITHDRAWING AN ANNEXED AREA FROM JACKSON COUNTY FIRE DISTRICT NO. 5
## (300 Clay Street: Planning Action #PA-T3-2025-000010)

**WHEREAS,** the owners of the property described in the attached Exhibits "A" have consented to the annexation of this property into the City of Ashland. With the exception of the subject property there are no electors residing in the tract to be annexed; and

**WHEREAS,** The Planning Commission, following proper public notice, held a public hearing on February 11, 2025, on the questions of annexation and outline plan approval for a Performance Standard Option (PSO) Subdivision. The Planning Commission reconvened on March 11, 2025, and adopted findings addressing each of the approval criteria; and

**WHEREAS,** pursuant to ORS 222.120 and ORS 222.524 a public hearing was held on April 1, 2025, on the questions of annexation and withdrawal of the property from Jackson County Fire District No. 5.

**THE PEOPLE OF THE CITY OF ASHLAND DO ORDAIN AS FOLLOWS:**

**SECTION 1.** The above recitals are true and correct and are fully incorporated herein by this reference.

**SECTION 2.** The land described in the attached Exhibit “A” and depicted in Exhibit “B” is declared to be annexed to the City of Ashland.

**SECTION 3.** The land described in the attached Exhibit “A” and depicted in Exhibit “B” is declared to be withdrawn from Jackson County Fire District No 5, pursuant to the provisions of ORS 222.111.

**SECTION 4.** **Severability.** Each section of this ordinance, and any part thereof, is severable, and if any part of this ordinance is held invalid by a court of competent jurisdiction, the remainder of this ordinance shall remain in full force and effect.

The foregoing ordinance was first reading by title only in accordance with Article X, Section 2(C) of the City Charter on the _____day of_____, 2025, and duly PASSED and ADOPTED this _____day of_____, 2025.

ATTEST:

_____

Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this _____ day of _____, 2025.

_____

Tonya Graham, Mayor

Reviewed as to form:

_____

Douglas M. McGeary, Acting City Attorney

REGISTERED
PROFESSIONAL
LAND SURVEYOR

OREGON
July 12, 2016
PHILIP J. DROSSOS
90718

RENEWAL: Dec. 31, 2025

# EXHIBIT A

## LEGAL DESCRIPTION

**BEGINNING** at a point on the existing City of Ashland Boundary, said point being the Southeast corner of Lot 27 of BUD'S DAIRY, A PLANNED COMMUNITY, according to the official plat thereof, now of record, in Jackson County, Oregon and being a point on the West line of that tract or parcel of land as set forth in City of Ashland Ordinance No. 2293; thence along said existing City of Ashland Boundary and said West line, South 00°07'22" West, 316.90 feet to a 5/8" rebar situated at the Southwest corner of said tract or parcel of land as set forth in the hereinabove mentioned referred to OrdinanceNo. 2293 and also being situated at the Northwest corner of that tract or parcel of land as set forth in City of Ashland Ordinance No. 2109; thence continue along said existing City of Ashland Boundary and along the West line of said tract or parcel of land as set forth in the hereinabove mentioned referred to Ordinance No. 2109, South 00°18'53" East, 13.40 feet to a 5/8" rebar situated at the Northeast corner of that tract of parcel of land as set forth in City of Ashland Ordinance No. 2928; thence leaving said West line and continue along said existing City of Ashland Boundary and along the North line of said hereinabove mentioned referred to Ordinance No. 2928, North 89°36'10" West, 636.98 feet to the East line of Clay Street; thence continue North 89°36'10" West, 60.00 feet to the West line of Clay Street; thence along said West line, North 00°04'41" East, 330.17 feet; thence leaving said West line, South 89°55'19" East, 60.00 feet to a 5/8" rebar being a point on the East line of Clay Street and marking the Southwest corner of hereinabove mentioned BUD'S DAIRY, A PLANNED COMMUNITY and being a point on the South line of that tract or parcel of land as set forth in City of Ashland Resolution No. 2003-40; thence along said South line of the existing City of Ashland Boundary and of BUD'S DAIRY, A PLANNED COMMUNITY, South 89°38'04" East, 255.60 feet; thence continue along said South line, South 89°34'07" East, 381.53 feet to the **POINT OF BEGINNING.**

TRACT TO BE ANNEXED
391E11CB TAX LOT 1100 &
CLAY STREET RIGHT-OF-WAY

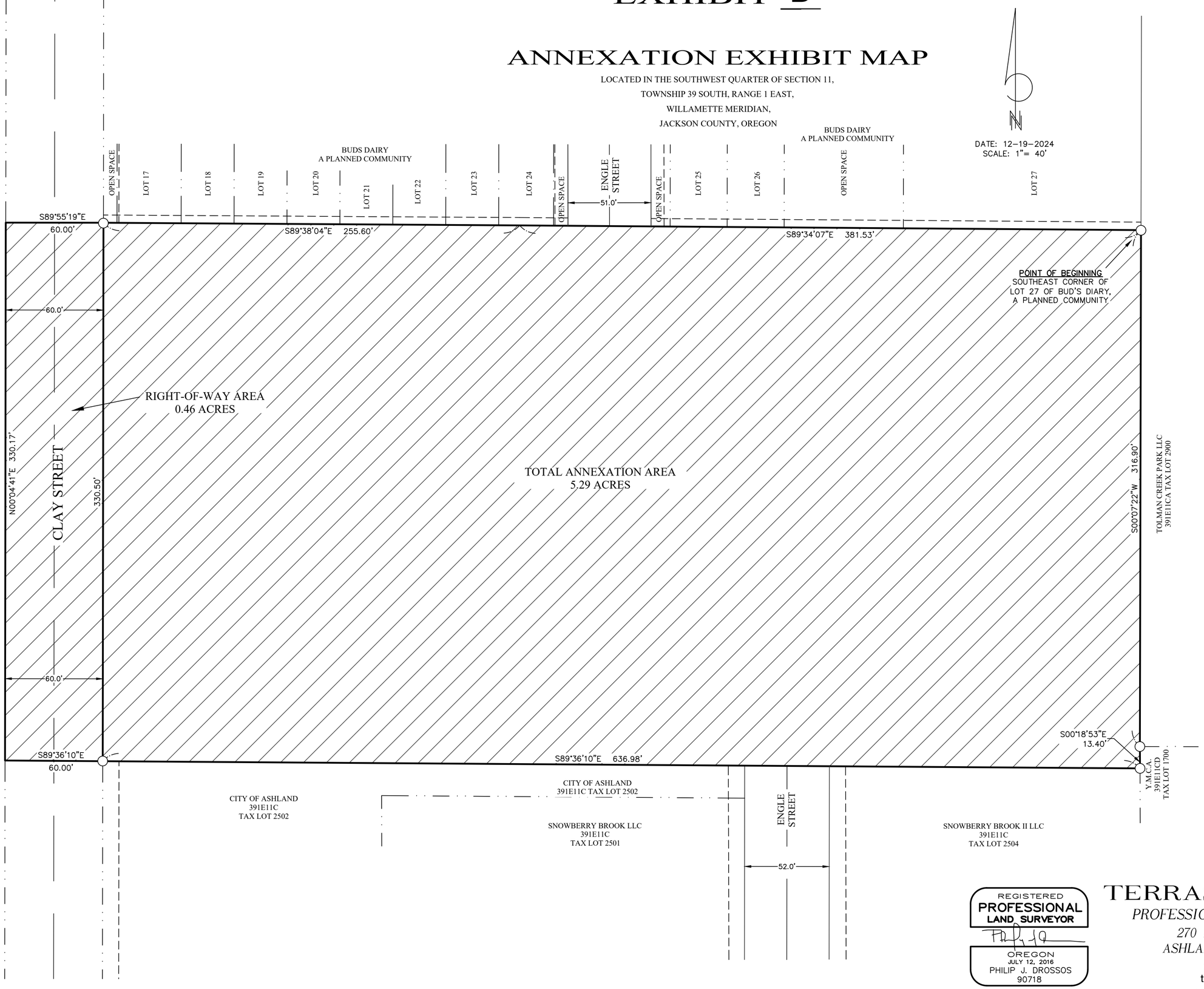
Prepared by Terrasurvey, Inc
270 4th Street
Ashland, OR 97520
December 19, 2024

# EXHIBIT B

## ANNEXATION EXHIBIT MAP

LOCATED IN THE SOUTHWEST QUARTER OF SECTION 11,
TOWNSHIP 39 SOUTH, RANGE 1 EAST,
WILLAMETTE MERIDIAN,
JACKSON COUNTY, OREGON

DATE: 12-19-2024
SCALE: 1"= 40'




REGISTERED
PROFESSIONAL
LAND SURVEYOR
OREGON
JULY 12, 2016
PHILIP J. DROSSOS
90718

RENEWS: 12-31-2025


TERRASURVEY, INC.
*PROFESSIONAL LAND SURVEYORS*
*270 FOURTH STREET*
*ASHLAND, OREGON 97520*
(541) 482-6474
terrain@bisp.net


JOB NO. 1653-23

ASSESSOR'S MAP NO. 39 1E 11 CD, TAX LOT 1100 & A PORTION OF CLAY STREET RIGHT-OF-WAY

**THE CITY OF ASHLAND**

**BEFORE THE CITY COUNCIL**

April 15, 2025

| | | |
|---|---|---|
| IN THE MATTER OF PLANNING ACTION #PA-T3-2024-00010 A REQUEST FOR ANNEXATION AND ZONE CHANGE FOR A 4.8-ACRE PROPERTY, ALONG WITH ADJACENT RIGHT-OF-WAY (ROW), FOR THE PROPERTY LOCATED AT 300 CLAY STREET AND A REQUEST FOR OUTLINE PLAN APPROVAL FOR A PERFORMANCE STANDARDS OPTION (PSO) SUBDIVISION, AS WELL AS A LIMITED ACTIVITIES WRPZ PERMIT. | ) | **FINDINGS, CONCLUSIONS, AND ORDERS.** |
| **OWNER:** BENTELLA LLC<br>**APPLICANT:** ROGUE PLANNING & DEVELOPMENT SERVICES | ) | |

**RECITALS:**

1) The subject property is Tax lot #1100 of Assessor Map 39-1E-11-CB and is addressed as 300 Clay Street. The property is 4.8 acres and slopes gently to the north. A comprehensive physical description of the property and its location are included in the Planning Commission Findings dated March 11, 2025 attached hereto, and for brevity are not repeated here.

2) The application is for a request for annexation and approval of outline plan for a Performance Standard Option (PSO) subdivision, a limited activities and uses permit for the WRPZ, and a tree removal permit to remove four non-hazard trees. The applicant provided detailed responses to all applicable approval criteria in the form of findings of fact, a trip generation assessment and TPR findings, legal description and survey of the property, and civil engineering plans. These application materials are on file at the Department of Community Development and by their reference are incorporated herein as if set out in full.

3) The Land Use Ordinance states that: "*all annexations shall be processed under the Type III procedure.*" Type III planning actions are reviewed by the Planning Commission, which makes a recommendation to the City Council. The Council makes final decisions on legislative proposals through the enactment of an ordinance.

4) The relevant approval criteria include Annexation at AMC 18.5.8.050, Outline Plan at AMC 18.3.9.040.A.3, a WRPZ Limited Activities and Uses Permit at AMC 18.3.11.060.D, and Tree Removal Permit for a tree that is not a hazard at AMC 18.5.7.040.B.2. These are set out in full in the Planning Commission Findings referenced above, and for brevity are not repeated here.

5) The Planning Commission, following proper public notice, held a public hearing on February 11, 2025. Testimony was received, and exhibits were presented. The Planning Commission deliberated and approved the application subject to conditions of approval. On March 11,

2025, the Planning Commission adopted findings, conclusions and orders addressing the relevant approval criteria and conditions of approval.

a. The application included a requested exception to the standard at AMC 18.5.8.050.G.3 that requires that "*the affordable units shall be comparable in bedroom mix with the market-rate units in the development.*"

b. Instead of approving the requested exception as presented, the Planning Commission approved the application with the following condition: “That the final plan submittal shall identify a mix of bedrooms for the affordable units comparable to the bedroom mix of the market-rate units and include necessary deed restrictions to ensure compliance."

6) The City Council, following proper public notice, held a public hearing on April 1, 2025. Testimony was received, and exhibits were presented by both Staff and the applicant. The City Council deliberated and approved the application including the requested exception to the standard at AMC 18.5.8.050.G.3 requiring compatibility of bedroom mix between the affordable and market rate units.

Now, therefore, the City Council of the City of Ashland finds, concludes, and recommends as follows:

**SECTION 1. EXHIBITS**

For the purposes of reference to these Findings, the attached index of exhibits, data, and testimony will be used.

Staff Exhibits lettered with an "S"

Proponent's Exhibits, lettered with a "P"

Opponent's Exhibits, lettered with an "O"

Hearing Minutes, Notices, and Miscellaneous Exhibits lettered with an "M"

**SECTION 2. CONCLUSORY FINDINGS OF FACT**

2.1 The City Council notes that chapter 18 of the Ashland Municipal Code (AMC) is the City’s Land Use Ordinance (LUO). The LUO regulates the development pattern envisioned by the Comprehensive Plan and encourages efficient use of land resources among other goals.

2.2 The City Council finds that it has received all information necessary to render a decision based on the application materials itself, the February 11th Staff Report, the March 11th Planning Commission Findings of Fact, the public testimony received, and the testimony from both staff and the applicant at the public hearings.

2.3 The City Council finds that the proposal for Annexation meets all applicable approval criteria described in AMC 18.5.8.050. These are addressed in the attached Planning Commission Findings and the City Council adopts them as their own with the following exception:

2.3.1 The City Council notes that the standard at AMC 18.5.8.050.G.3 requires that “*The*

*affordable units shall be comparable in bedroom mix with the market rate units in the development.*" and that the applicant is requesting an exception to this standard.

2.3.2 The City Council notes that AMC 18.5.8.050.G.6 provides that "*Exceptions to the requirements of subsections 18.5.8.050.G.2 through 18.5.8.050.G.5, above, may be approved by the City Council upon consideration*" of three different situations. The second of those is that "*That the alternative phasing proposal not meeting subsection 18.5.8.050.G.4 provided by the applicant provides adequate assurance that the affordable housing units will be provided in a timely fashion.*"

2.3.3 The City Council notes that the phasing schedule requirements of AMC 18.5.8.050.G.4 requires "*That 50 percent of the affordable units shall have been issued building permits prior to issuance of a certificate of occupancy for the last of the first 50 percent of the market rate units.*" and that "*Prior to issuance of a building permit for the final ten percent of the market rate units, the final 50 percent of the affordable units shall have been issued certificates of occupancy.*"

2.3.4 The City Council finds that a thorough review of the application materials confirms that the proposed phasing of the affordable housing, ensuring its completion prior to any market-rate units, provides adequate assurance that the development of a needed housing type and will be "*provided in a timely fashion.*" The City Council concludes that the requested exception is beneficial to the community and finds that the approval criterion for the exception is met based on the proposed phasing.

2.4 The City Council finds that the proposal for Outline Plan of a Performance Standard Option (PSO) subdivision meets all applicable criteria for described in AMC 18.3.9.040.A.3. These are addressed in the attached Planning Commission Findings and the City Council adopts them as their own.

2.5 The City Council finds that the proposal for a Limited Activities and Uses Permit in the Water Resource Protection Zone (WRPZ) meets all of the applicable criteria described in AMC 18.5.5.050. These are addressed in the attached Planning Commission Findings and the City Council adopts them as their own.

2.6 The City Council finds that the request to remove four "Trees that [are] not a hazard" meets all of the applicable criteria described in AMC 18.5.7.040.B.2. These are addressed in the attached Planning Commission Findings and the City Council adopts them as their own.

2.7 The City Council notes that following proper public notice, a public hearing was held on April 1, 2025, where testimony was received, and exhibits were presented.

2.8 Following the close of the public hearing the City Council deliberated and voted (5-0) in favor of the following motion:

> "I move to approve the first reading of Ordinance No. 3259, an ordinance annexing property and withdrawing an annexed area from Jackson County Fire District No. 5, and direct staff to prepare findings for Planning Action #PA-T3-2024-00010 reflecting the approval of the applicant's requested exception to the

bedroom mix standard under AMC 18.5.8.050.G.3, while incorporating the remainder of the Planning Commission's March 11, 2025, recommended conditions of approval, and to return for second reading on April 15, 2025.

**SECTION 3. DECISION**

3.1 Based on the record of the Public Hearings on this matter, the City Council approves the application for annexation, outline plan approval, limited activities and uses permit for the WRPZ and a tree removal permit to remove four non-hazard trees.

3.2 In addition to the findings set out above, the City Council hereby adopts the Planning Commission March 11, 2025 Findings of Fact and conditions of approval as the City Council's own, with the specific excluding section 2.4.7.1 and condition of approval #2d. A copy of these findings is attached hereto including explicit strikethrough of sections 2.4.7.1 and condition of approval #2d.

_____ _____

City Council Approval Date

**THE CITY OF ASHLAND**

**BEFORE THE PLANNING COMMISSION**

March 11, 2025

| | | |
|---|---|---|
| IN THE MATTER OF PLANNING ACTION #PA-T3-2024-00010 A REQUEST FOR ANNEXATION AND ZONE CHANGE FOR A 4.8-ACRE PROPERTY, ALONG WITH ADJACENT RIGHT-OF-WAY (ROW), FOR THE PROPERTY LOCATED AT 300 CLAY STREET AND A REQUEST FOR OUTLINE PLAN APPROVAL FOR A PERFORMANCE STANDARDS OPTION (PSO) SUBDIVISION, AS WELL AS A LIMITED ACTIVITIES WRPZ PERMIT. | ) | **FINDINGS, CONCLUSIONS, AND ORDERS.** |
| **OWNER:** BENTELLA LLC<br>**APPLICANT:** ROGUE PLANNING & DEVELOPMENT SERVICES | ) | |

**RECITALS:**

1) The subject property is Tax lot #1100 of Assessor Map 39-1E-11-CB and is addressed as 300 Clay Street. The property is 4.8 acres and slopes gently to the north. The property has 330-feet of frontage along Clay Street which is fully improved to city standards. Engle Street terminates on both the north and south side of the property.

2) The subject property is located on the east side of Clay Street, with "East Village Subdivision" (formally known as "Bud's Dairy") to the north, and the "Snowberry Brook" development to the south. To the east of the subject property is the rear of a mobile home park that fronts Tolman Creek Road. The property is within the UGB and is adjacent to the City Limits on the north, east and south sides.

3) The adopted Wetland Resource Protection Zone (WRPZ) maps indicate wetlands in two locations; however, the application materials include a wetland delineation, reviewed and approved by the Department of State Lands (DSL), which determined that there is only a single identified wetland that is 0.0096 acres. The application materials propose a twenty-foot buffer around the identified wetland to be dedicated as open space.

4) The application is a request for annexation and outline plan approval for a Performance Standard Option (PSO) subdivision. The applicant provided detailed responses to all applicable approval criteria in the form of findings of fact, a trip generation assessment and TPR findings, legal description and survey of the property, landscaping and civil engineering plans, and conceptual building design for future Site Design Review. These materials are on file at the Department of Community Development and by their reference are incorporated herein as if set out in full.

    a. The proposed PSO subdivision includes a total of 25-lots for residential development, 21 of them are proposed for single family residential (SFR)

development, four lots proposed with four-plex townhomes, and four additional lots to be dedicated as open space area. The SFR lots may be developed with either Accessory Residential Units (ARU) or duplexes as permissible by House Bill 2001.

b. The 16 dwellings in the fourplexes plus the 21 SFR lots sums to a proposed density of 37 dwelling units.

c. The application also includes a limited activities permit for public utilities within the Water Resource Protection Zone (WRPZ).

d. The application also includes a request to remove four non-hazard trees.

5) Annexations require that at least 25% of the base density be affordable housing. In the present application there are eight affordable housing units proposed at 80% area median income (AMI) to meet this requirement.

6) The Land Use Ordinance states that: "all annexations shall be processed under the Type III procedure." Type III planning actions are legislative decisions by definition, and are reviewed by the Planning Commission, which makes a recommendation to the City Council. The Council makes final decisions on legislative proposals through the enactment of an ordinance.

7) The criteria of approval for Annexation are described in **AMC 18.5.8.050** as follows:

An application for an annexation may be approved if the proposal meets the applicable criteria in subsections A through H below. The approval authority may, in approving the application, impose conditions of approval consistent with the applicable criteria and standards, and grant exceptions and variances to the criteria and standards in this section in accordance with subsection I.

**A.** The annexed area is within the City's Urban Growth Boundary.

**B.** The annexation proposal is consistent with the Comprehensive Plan designations applicable to the annexed area, including any applicable adopted neighborhood, master, or area plan, and is an allowed use within the proposed zoning.

**C.** The annexed area is contiguous with the City limits.

**D.** Adequate City facilities for the provision of water to the annexed area as determined by the Public Works Department; the transport of sewage from the annexed area to an approved waste water treatment facility as determined by the Public Works Department; the provision of electricity to the annexed area as determined by the Electric Department; urban storm drainage as determined by the Public Works Department can and will be provided from the annexed area. Unless the City has declared a moratorium based upon a shortage of water, sewer, or electricity, it is recognized that adequate capacity exists system-wide for these facilities. All required public facility improvements shall be constructed and installed in accordance with subsection 18.4.6.030.A.

**E.** Adequate transportation can and will be provided to serve the annexed area. For the purposes of this section, "adequate transportation" for annexations consists of vehicular, bicycle, pedestrian, and transit transportation meeting the following standards:

1. For vehicular transportation a minimum 22-foot-wide paved access exists, or can and will be constructed, providing access to the annexed area from the nearest fully improved collector or arterial street. All streets bordering on the annexed area shall be improved, at a minimum, to an applicable City half-street standard. The approval authority may, after assessing the impact of the development, require the full improvement of streets bordering on the annexed area. All streets located within annexed areas shall be fully improved to City standards unless exception criteria apply. Where future street

dedications are indicated on the Street Dedication Map or required by the City, provisions shall be made for the dedication and improvement of these streets and included with the application for annexation.

2. For bicycle transportation, safe and accessible bicycle facilities according to the safety analysis and standards of the governing jurisdiction of the facility or street (e.g., City of Ashland, Jackson County, Oregon Department of Transportation) exist, or can and will be constructed. Should the annexed area border an arterial street, bike lanes shall be constructed along the arterial street frontage of the annexed area. Likely bicycle destinations within a quarter of a mile from the annexed area shall be determined and the approval authority may require the construction of bicycle lanes or multiuse paths connecting the annexed area to the likely bicycle destinations after assessing the impact of the development proposed concurrently with the annexation.

3. For pedestrian transportation, safe and accessible pedestrian facilities according to the safety analysis and standards of the governing jurisdiction of the facility or street (e.g., City of Ashland, Jackson County, Oregon Department of Transportation) exist, or can and will be constructed. Full sidewalk improvements shall be provided on one side of all streets bordering on the proposed annexed area. Sidewalks shall be provided as required by ordinance on all streets within the annexed area. Where the annexed area is within a quarter of a mile of an existing sidewalk system or a location with demonstrated significant pedestrian activity, the approval authority may require sidewalks, walkways or multiuse paths to be constructed and connect to either or both the existing system and locations with significant pedestrian activity.

4. For transit transportation, should transit service be available to the annexed area, or be likely to be extended to the annexed area in the future based on information from the local public transit provider, the approval authority may require construction of transit facilities, such as bus shelters and bus turnout lanes.

5. Timing of Transportation Improvements. All required transportation improvements shall be constructed and installed in accordance with subsection 18.4.6.030.A.

**F.** For all residential annexations, a plan shall be provided demonstrating that the development of the annexed area will ultimately occur at a minimum density of 90 percent of the base density for the zone, unless reductions in the total number of units are necessary to accommodate significant natural features, topography, access limitations, or similar physical constraints. The owner or owners of the annexed area shall sign an agreement, to be recorded with the County Clerk after approval of the annexation, ensuring that future development will occur in accord with the minimum density indicated in the development plan. For purposes of computing maximum density, portions of the annexed area containing unbuildable lots, parcels, or portions of the annexed area such as existing streets and associated rights-of-way, railroad facilities and property, wetlands, floodplain corridor lands, slopes greater than 35 percent, or land area dedicated as a public park, shall not be included.

**G.** Except as provided in subsection 18.5.8.050.G.7, below, annexations with a density or potential density of four residential units or greater and involving residential zoned lands, or commercial, employment or industrial lands with a Residential Overlay (R-Overlay) shall meet the following requirements:

1. The total number of affordable units provided to qualifying buyers, or to qualifying renters, shall be equal to or exceed 25 percent of the base density as calculated using the unit equivalency values set forth herein. The base density of the annexed area for the purpose of calculating the total number of affordable units in this section shall exclude any unbuildable lots, parcels, or portions of the annexed area such as existing streets and associated rights-of-way, railroad facilities and property, wetlands, floodplain corridor lands, water resource areas, slopes greater than 35 percent, or land area dedicated as a public park.

a. Ownership units restricted to households earning at or below 120 percent of the area median income shall have an equivalency value of 0.75 unit.

b. Ownership units restricted to households earning at or below 100 percent of the area median income shall have an equivalency value of 1.0 unit.

c. Ownership or rental units restricted to households earning at or below 80 percent of the area median income shall have an equivalency value of 1.25 unit.

2. As an alternative to providing affordable units per section 18.5.8.050.G.1, above, the applicant may provide title to a sufficient amount of buildable land for development complying with subsection 18.5.8.050.G.1.b, above, through transfer to a non-profit (IRC 501(3)(c)) affordable housing developer or public corporation created under ORS 456.055 to 456.235.

a. The land to be transferred shall be located within the project meeting the standards set forth in sections 18.5.8.050.G.5 and 18.5.8.050.G.6.

b. All needed public facilities shall be extended to the area or areas proposed for transfer.

c. Prior to commencement of the project, title to the land shall be transferred to the City, an affordable housing developer which must either be a unit of government, a non-profit 501(c)(3) organization, or a public corporation created under ORS 456.055 to 456.235.

d. The land to be transferred shall be deed restricted to comply with Ashland's affordable housing program requirements.

e. Transfer of title of buildable land in accordance with this subsection shall exempt the project from the development schedule requirements set forth in subsection 18.5.8.050.G.4.

3. The affordable units shall be comparable in bedroom mix with the market rate units in the development.

a. The number of bedrooms per dwelling unit in the affordable units within the residential development shall be in equal proportion to the number of bedrooms per dwelling unit in the market rate units within the residential development. This provision is not intended to require the same floor area in affordable units as compared to market rate units. The minimum square footage of each affordable unit shall comply with the minimum required floor area based as set forth in Table 18.5.8.050.G.3, or as established by the U.S. Department of Housing and Urban Development (HUD) for dwelling units developed under the HOME program.

4. A development schedule shall be provided that demonstrates that the affordable housing units per subsection 18.5.8.050.G shall be developed, and made available for occupancy, as follows:

a. That 50 percent of the affordable units shall have been issued building permits prior to issuance of a certificate of occupancy for the last of the first 50 percent of the market rate units.

b. Prior to issuance of a building permit for the final ten percent of the market rate units, the final 50 percent of the affordable units shall have been issued certificates of occupancy.

5. That affordable housing units shall be constructed using comparable building materials and include equivalent amenities as the market rate units.

a. The exterior appearance of the affordable units in any residential development shall be visually compatible with the market rate units in the development. External building materials and finishes shall be substantially the same in type and quality for affordable units as for market rate units.

b. Affordable units may differ from market rate units with regard to floor area, interior finishes and materials, and housing type; provided, that the affordable housing units are provided with comparable features to the market rate units, and

shall have generally comparable improvements related to energy efficiency, including plumbing, insulation, windows, appliances, and heating and cooling systems.

6. Exceptions to the requirements of subsections 18.5.8.050.G.2through 18.5.8.050.G.5, above, may be approved by the City Council upon consideration of one or more of the following:

a. That an alternative land dedication as proposed would accomplish additional benefits for the City, consistent with the purposes of this chapter, than would development meeting the on-site dedication requirement of subsection 18.5.8.050.G.2.

b. That the alternative phasing proposal not meeting subsection 18.5.8.050.G.4 provided by the applicant provides adequate assurance that the affordable housing units will be provided in a timely fashion.

c. That the materials and amenities applied to the affordable units within the development, that are not equivalent to the market rate units per subsection 18.5.8.050.G.5, are necessary due to local, state, or federal affordable housing standards or financing limitations.

7. The total number of affordable units described in this subsection shall be determined by rounding up fractional answers to the nearest whole unit. A deed restriction or similar legal instrument shall be used to guarantee compliance with affordable criteria for a period of not less than 60 years for units qualified as affordable rental housing, or 30 years for units qualified as affordable for-purchase housing.

**H.** One or more of the following standards are met:

1. The annexation proposal shall meet the requirements of subsection 18.5.8.050.B, above.

2. A current or probable danger to public health exists within the proposed area for annexation due to lack of full City sanitary sewer or water services in accordance with the criteria in ORS chapter 222 or successor state statute.

3. Existing development in the proposed area for annexation has inadequate water or sanitary sewer service, or the service will become inadequate within one year.

4. The proposed area for annexation has existing City water or sanitary sewer service extended, connected, and in use, and a signed consent to annexation agreement has been filed and accepted by the City.

5. The proposed area for annexation is an island surrounded by lands within the City limits.

**I.** Exceptions and Variances to the Annexation Approval Criteria and Standards. The approval authority may approve exceptions to and variances from the approval criteria and standards in this section using the criteria in section 18.4.6.020.B.1, Exceptions to the Street Design Standards, or chapter 18.5.5, Variances.

8) The criteria of approval for Outline Plan of a PSO subdivision are described in **AMC 18.3.9.040.A.3** as follows:

3. Approval Criteria for Outline Plan. The Planning Commission shall approve the outline plan when it finds all of the following criteria have been met:

A. the development meets all applicable ordinance requirements of the city.

B. adequate key city facilities can be provided including water, sewer, paved access to and through the development, electricity, urban storm drainage, police and fire protection, and adequate transportation; and that the development will not cause a city facility to operate beyond capacity.

C. the existing and natural features of the land; such as wetlands, floodplain corridors, ponds, large trees, rock outcroppings, etc., have been identified in the plan of the development and significant features have been included in the common open space, common areas, and unbuildable areas.

D. the development of the land will not prevent adjacent land from being developed for the uses shown in the comprehensive plan.

E. there are adequate provisions for the maintenance of common open space and common areas, if required or provided, and that if developments are done in phases that the early phases have the same or higher ratio of amenities as proposed in the entire project.

F. the proposed density meets the base and bonus density standards established under this chapter.

G. the development complies with the street standards.

H. the proposed development meets the common open space standards established under section 18.4.4.070. Common open space requirements may be satisfied by public open space in accordance with section 18.4.4.070 if approved by the city of Ashland.

9) The criteria of approval for a WRPZ Limited Activities and Uses Permit are described in **AMC 18.3.11.060.D** as follows:

D. Limited Activities and Uses Permit. All limited activities and uses described in section 18.3.11.060 shall be subject to a Type I procedure in section 18.5.1.050. An application for a limited activities and uses permit shall be approved if the proposal meets all of the following criteria:

1. All activities shall be located as far away from streams and wetlands as practicable, designed to minimize intrusion into the Water Resource Protection Zone and disturb as little of the surface area of the Water Resource Protection Zone as practicable.

2. The proposed activity shall be designed, located and constructed to minimize excavation, grading, area of impervious surfaces, loss of native vegetation, erosion, and other adverse impacts on water resources.

3. On stream beds or banks within the bank-full stage, in wetlands, and on slopes of 25 percent or greater in a Water Resource Protection Zone, excavation, grading, installation of impervious surfaces, and removal of native vegetation shall be avoided except where no practicable alternative exists, or where necessary to construct public facilities or to ensure slope stability.

4. Water, storm drain, and sewer systems shall be designed, located and constructed to avoid exposure to floodwaters, and to avoid accidental discharges to streams and wetlands.

5. Stream channel repair and enhancement, riparian habitat restoration and enhancement, and wetland restoration and enhancement will be restored through the implementation of a mitigation plan prepared in accordance with the standards and requirements in section 18.3.11.110, Mitigation Requirements.

6. Long-term conservation, management and maintenance of the Water Resource Protection Zone shall be ensured through preparation and recordation of a management plan as described in subsection 18.3.11.110.C, except a management plan is not required for residentially zoned lots occupied only by a single-family dwelling and accessory structures.

10) The criteria of approval for a Tree Removal Permit for a non-hazardous tree are described in **AMC 18.5.7.040.B.2** as follows:

2. Tree That is Not a Hazard. A Tree Removal Permit for a tree that is not a hazard shall be granted if the approval authority finds that the application meets all of the following criteria, or can

be made to conform through the imposition of conditions.

a. The tree is proposed for removal in order to permit the application to be consistent with other applicable Land Use Ordinance requirements and standards, including but not limited to applicable Site Development and Design Standards in part 18.4 and Physical and Environmental Constraints in part 18.3.10.

b. Removal of the tree will not have a significant negative impact on erosion, soil stability, flow of surface waters, protection of adjacent trees, or existing windbreaks.

c. Removal of the tree will not have a significant negative impact on the tree densities, sizes, canopies, and species diversity within 200 feet of the subject property. The City shall grant an exception to this criterion when alternatives to the tree removal have been considered and no reasonable alternative exists to allow the property to be used as permitted in the zone.

d. Nothing in this section shall require that the residential density to be reduced below the permitted density allowed by the zone. In making this determination, the City may consider alternative site plans or placement of structures of alternate landscaping designs that would lessen the impact on trees, so long as the alternatives continue to comply with the other provisions of this ordinance.

e. The City shall require the applicant to mitigate for the removal of each tree granted approval pursuant to section 18.5.7.050. Such mitigation requirements shall be a condition of approval of the permit.

11) The Planning Commission, following proper public notice, held a public hearing on February 11, 2025.

12) Testimony was received, and exhibits were presented. The Planning Commission deliberated and approved the application subject to conditions of approval.

Now, therefore, the Planning Commission of the City of Ashland finds, concludes, and recommends as follows:

## SECTION 1. EXHIBITS

For the purposes of reference to these Findings, the attached index of exhibits, data, and testimony will be used.

Staff Exhibits lettered with an "S"

Proponent's Exhibits, lettered with a "P"

Opponent's Exhibits, lettered with an "O"

Hearing Minutes, Notices, and Miscellaneous Exhibits lettered with an "M"

## SECTION 2. CONCLUSORY FINDINGS OF FACT

2.1 The Planning Commission notes that chapter 18 of the Ashland Municipal Code (AMC) is the City's Land Use Ordinance (LUO). The LUO regulates the development pattern envisioned by the Comprehensive Plan and encourages efficient use of land resources among other goals. The Planning Commission notes that when considering the decision to approve or deny an application the Planning Commission considers the application materials against the relevant approval criteria in the LUO.

2.2 The Planning Commission finds that it has received all information necessary to render a decision based on the application itself, the February 11th Staff Report, the applicant's testimony, the exhibits received, and public testimony received at the public hearing.

2.3 The Planning Commission notes that the application was deemed complete and that the notice for the public hearing was both posted on, January 6 (20 days prior to the February 11th Meeting) at the frontage of the subject property, as well as the street stubs on the north and south side of the property. Notice was also mailed to all property owners within 200-feet of the subject property.

2.4 The Planning Commission finds that the proposal for Annexation meets all applicable approval criteria described in AMC 18.5.8.050 and detailed below.

2.4.1 The first approval criterion for annexation is that "*The annexed area is within the City's Urban Growth Boundary (UGB).*" The Planning Commission notes that the UGB runs along the north side of East Main in this portion of town which is approximately 0.2 miles to the north. The Planning Commission concludes that the property is within the UGB and finds that this approval criterion has been met.

2.4.2 The second approval criterion for annexation is that "*The annexation proposal is consistent with the Comprehensive Plan designations applicable to the annexed area.*" The Planning Commission notes that the comprehensive plan designation of the property is suburban residential, and the property does not yet have an assigned zone. The application requests a zone change to R-1-3.5 which is appropriate for the comprehensive plan designation of suburban residential. The Planning Commission notes that the table at AMC 18.3.9.050 provides the residential density for a PSO subdivision, and that for the R-1-3.5 zone it specifies a residential density of 7.2 dwelling unit per acre. The Planning Commission notes that the subject property is 4.8 acres and concludes that the allowed base density for the subject property is 34.56. (4.8 x 7.2 = 34.56). The Planning Commission notes that the present proposal leverages an affordable housing density bonus to exceed the base density for a total of 37 dwellings.

The Planning Commission notes that AMC 18.3.9.050.B.3 provides a density bonus of two units for each affordable housing unit provided up to maximum bonus of 35-percent, this would allow for up to an additional 12 units over the based density. The proposed 37 dwellings utilize only 3 of the available bonus units for a calculated bonus of 8.7%, which is well below the 35 percent available. The Planning Commission concludes that the proposed 37 dwellings are within the allowed base and bonus density standards and find that the proposed density of residential development, including the proposed affordable housing, is consistent with the Comprehensive Plan Designation. The Planning Commission concludes that based on the proposed number of dwellings, the size of the property, and the requested zoning, and finds that this approval criterion has been met.

2.4.3. The third approval criterion for annexation is that "*The annexed area is contiguous with the City limits.*" The Planning Commission notes that the subject property is shown on the map below. The Planning Commission notes that the map is from the City Geographic Information System (GIS) and has a yellow and grey dashed

line that indicates the city limits. The Planning Commission note that the subject property is contiguous with the City limits to the north, south, and east and finds that this approval criterion has been met.

2.4.4 The fourth approval criterion for annexation is that "*Adequate City facilities for the provision of water to the annexed area as determined by the Public Works Department; the transport of sewage from the annexed area to an approved waste water treatment facility as determined by the Public Works Department; the provision of electricity to the annexed area as determined by the Electric Department; urban storm drainage as determined by the Public Works Department can and will be provided from the annexed area.*" The Planning Commission notes that the application indicates that the property is served by all city utilities and that the Public Works Department has confirmed that there are no concerns regarding the capacity of any City facilities. The Planning Commission notes that Clay Street contains an eight-inch water main, eight-inch sewer main, and an 18" storm water main, that Engle Street has eight-inch water mains at both the north and south of the property as well as an eight-inch sewer main and a ten-inch sewer main at the north stub of Engle Street. The Planning Commission notes that due to the nature of gravity systems and the topography of the site no sewer or storm is needed on the southern stub of Engle Street. The Planning Commission notes that the application includes a complete set of plans for the proposed civil improvements prepared by Powell Engineering & Consulting which provide complete details on street improvements including curb, gutter, planter strip and sidewalk as well as a protected bike lane all designed to meet city standards. The Planning Commission concludes that based on the existing and proposed improvements that this approval criterion is met.

2.4.5 The fifth approval criterion for annexation is that "*Adequate transportation can and will be provided to serve the annexed area. For the purposes of this section, "adequate transportation" for annexations consists of vehicular, bicycle, pedestrian, and transit transportation.*" The Planning Commission notes that the LUO requires a

minimum 22-foot-wide paved access and for both bicycle and pedestrian facilities be safe and accessible pursuant to the governing jurisdiction.

The Planning Commission notes that the application material includes a trip generation assessment and Transportation Planning Rule (TPR) findings prepared by Southern Oregon Transportation and Engineering. These materials detail the expected trip generation of the proposed development and show that the proposed development is below the requirements for a complete Traffic Impact Analysis (TIA) as the development is expected to only generate 30 weekday peak hour trips where the threshold for a TIA is 50 newly generated vehicle trips.

The Planning Commission notes that the proposed development includes the creation of new local neighborhood roads connecting Engle Street, as well as a new neighborhood street connecting to Clay Street and that all proposed public facilities are to be constructed to City of Ashland Standards. The Planning Commission notes that all proposed roads meet or exceed the 22-foot wide paved width. The Planning Commission finds, based on the fact that all proposed transportation facilities are to be built to the City Standards, and that those standards were created to provide adequate safe and accessible transportation that this approval criterion is met.

2.4.6 The sixth approval criteria for annexation is that "For *all residential annexations, a plan shall be provided demonstrating that the development of the annexed area will ultimately occur at a minimum density of 90 percent of the base density for the zone, unless reductions in the total number of units are necessary to accommodate significant natural features, topography, access limitations, or similar physical constraints.*" The Planning Commission notes, as stated above, that the subject property is 4.8 acres and has an allowed base density of 7.2 dwellings per acre for a calculated base density of ~34 (4.8 x 7.2 = 34.56). The Planning Commission notes that 90% of the calculate base density is ~32 dwelling units. (34.56 x 0.9 = 31.1). The Planning Commission notes that the proposed density for the subdivision is 37 dwellings which exceeds the minimum requirement of 32 dwellings and therefore find that the approval criterion is met.

2.4.7 The seventh approval criteria for annexation is that "*annexations with a density or potential density of four residential units or greater and involving residential zoned lands … The total number of affordable units provided to qualifying buyers, or to qualifying renters, shall be equal to or exceed 25 percent of the base density as calculated using the unit equivalency values set forth herein.*" The Planning Commission notes that the applicant proposes affordable housing restricted to households earning at or below 80 percent of the area median income (AMI), and that such units each have an equivalency value of 1.25 unit. The Planning Commission notes that AMC 18.5.8.050.G.1 provides that "*The base density of the annexed area for the purpose of calculating the total number of affordable units in this section shall exclude any unbuildable area including wetlands.*" Additionally, AMC 18.5.8.050.G.7 provides that "*The total number of affordable units described in this subsection shall be determined by rounding up fractional answers to the nearest whole unit.*" As discussed above the wetland delineation determined that the area of the wetland is 0.0096 acres. Therefore, for the purpose of calculating the total number of affordable units we calculate the density excluding the

wetland area, as follows: 4.8 acres - 0.0096 acres = 4.79 acres x 7.2 dwelling units per acer = 34.49 dwelling units x 0.25 = 8.6 ~ 9 affordable dwelling units. The Planning Commission reaffirms that affordable units designated for households earning 80% AMI or less have an equivalent value of 1.25 per AMC 18.5.8.050G.1.c. To determine the required number of 80% AMI units needed to satisfy the affordable housing requirement, the total required affordable units—in this case, nine—is divided by 1.25 (the equivalency value).

Calculation: 9 affordable units ÷ 1.25 = 7.2, which rounds up to 8 units.

Therefore, providing eight units at 80% AMI fulfills the requirement for nine affordable units. Based on this calculation, the Planning Commission concludes that the approval criterion is met.

~~2.4.7.1 The Planning Commission notes that the application includes a request for an Exception to AMC 18.5.8.050.G.3 which requires the affordable units to have a comparable bedroom mix with the market rate units. In this instance, the market rate units are a mix of attached and detached two-, three- and four-bedroom units as well as potential Accessory Dwelling Units, while the affordable units are all proposed as attached two-bedroom townhomes. The application asserts that the applicant intends to build the townhomes as rental units themselves but will not build all of the other detached residential units on the single-family lots and thus cannot control the number of bedrooms. The Planning Commission notes that the City Council will ultimately make a decision with regard to the Annexation criteria, including this Exception request, and will rely on the Planning Commission's recommendation. The Planning Commission finds that the Exception request does not independently meet the burden of proof. However, with the following condition of approval as recommended by the Commission, the Commission finds that the criterion will be met: "*That the final plan submittal shall identify a mix of bedrooms for the affordable units comparable to the bedroom mix of the market rate units and include necessary deed restrictions to ensure compliance*."~~

2.4.8 The eighth approval criterion for annexation requires at least one of five standards to be met. The first of these standards is [*] that "*The annexation proposal shall meet the requirements of subsection 18.5.8.050.B, above.*" The referenced section is the second approval criteria which states, "*that the proposal is consistent with the Comprehensive Plan designations*" and was discussed in section 2.4.2 above. The Planning Commission notes again that the proposal is consistent with the Comprehensive Plan and finds that since the second approval criterion was satisfied that this approval criterion has also been

[*] The other four options are for the situations where the annexation would be allowed even if the development is not consistent with the Comprehensive plan:

2. A current or probable danger to public health exists within the proposed area for annexation due to lack of full City sanitary sewer or water services in accordance with the criteria in ORS chapter 222 or successor state statute.
3. Existing development in the proposed area for annexation has inadequate water or sanitary sewer service, or the service will become inadequate within one year.
4. The proposed area for annexation has existing City water or sanitary sewer service extended, connected, and in use, and a signed consent to annexation agreement has been filed and accepted by the City.
5. The proposed area for annexation is an island surrounded by lands within the City limits.

met.

2.4.9 The ninth and final approval criteria for annexation relates to requested exceptions. The only exception requested, which was discussed above, was an exception to AMC 18.5.8.050.G.3, which requires the affordable units to have a comparable bedroom mix with the market rate units. The Planning Commission made findings that there was insufficient evidence in the record to support such an exception and included a condition of approval to ensure that the standard is met at final plan approval. With the denial of the exception The Planning Commission finds that this approval criterion is met.

2.4.10 Finally, the Land Use Ordinance requires that "*the applicant for the annexation shall also declare which procedure under ORS chapter 222 the applicant proposes that the Council use, and supply evidence that the approval through this procedure is likely*" (AMC 18.5.8.070). The application states that the annexation procedure outlined in ORS 222.125 should be utilized for the annexation and goes on to say that "*This procedure allows for annexation without the need for an election when all landowners in the proposed territory, as well as a majority of the electors, consent in writing. The applicant is the sole owner and can provide written consent within the annexation territory*." Based on the fact that there is a single property is proposed for annexation, the Planning Commission finds that this standard is met.

The Planning Commission concludes based on the above that all applicable approval criteria for annexation approval have been satisfied.

2.5 The Planning Commission finds that the proposal for Outline Plan of a Performance Standard Option (PSO) subdivision meets all applicable criteria for described in AMC 18.3.9.040.A.3 and detailed below.

2.5.1 The first approval criterion for Outline Plan approval is that "*The development meets all applicable ordinance requirements of the City.*" The Planning Commission notes that this is an all-encompassing criterion and that it has considered which City Ordinances are applicable. The Planning Commission notes that for the purposes of resolving this criterion we rely on the entirety of the record including the applicant's submittal, and the Staff Report, and testimony provided. The Planning Commission notes that with the findings that are set out below, and the adopted conditions of approval that the proposal will meet all applicable ordinance requirements and finds that this criterion of approval is satisfied.

2.5.2 The second approval criterion for Outline Plan approval is that "*Adequate key City facilities can be provided including water, sewer, paved access to and through the development, electricity, urban storm drainage, police and fire protection, and adequate transportation; and that the development will not cause a City facility to operate beyond capacity.*" The Planning Commission notes that city facilities were discussed at length in the fourth approval criterion for annexation and restate them for the record here. The Planning Commission notes that the application indicates that the property is served by all city utilities and that the Public Works Department has confirmed that there are no concerns regarding the capacity of any City facilities. The Planning Commission notes

that Clay Street contains an eight-inch water main, eight-inch sewer main, and an 18" storm water main, that Engle Street has eight-inch water mains at both the north and south of the property as well as an eight-inch sewer main and a ten-inch sewer main at the north stub of Engle Street. The Planning Commission notes that due to the nature of gravity systems and the topography of the site no sewer or storm is needed on the southern stub of Engle Street. The Planning Commission notes that the application includes a complete set of plans for the proposed civil improvements prepared by Powell Engineering & Consulting which provide complete details on street improvements including curb, gutter, planter strip and sidewalk as well as a protected bike lane all designed to meet city standards. The Planning Commission concludes that based on the existing and proposed improvements that this approval criterion is met.

2.5.3 The third criterion for approval of an Outline Plan is that "*The existing and natural features of the land; such as wetlands, floodplain corridors, ponds, large trees, rock outcroppings, etc., have been identified in the plan of the development and significant features have been included in the open space, common areas, and unbuildable areas.*" The Planning Commission notes that aside from the proposed tree removals, which are discussed below, that the only other natural feature to address is the delineated wetland. The Planning Commission notes that the wetland along with a twenty-foot buffer is proposed to be in a lot dedicated to open space. The Planning Commission notes that there are no other natural features to address and find that this approval criteria is satisfied.

2.5.4 The fourth criterion for approval of an Outline Plan is that "*The development of the land will not prevent adjacent land from being developed for the uses shown in the Comprehensive Plan.*" The Planning Commission notes that to the west is Clay Street, and that the surrounding property is fully developed, with "East Village" Subdivision to the north, the "Snowberry Brook" development to the south and to the east is the rear of a mobile home park that fronts Tolman Creek Road. The Planning Commission notes that there is no adjacent vacant land and that with the foregoing find that this approval criterion is met.

2.5.5 The fifth criterion for approval of an Outline Plan is that is that "*There are adequate provisions for the maintenance of open space and common areas, if required or provided, and that if developments are done in phases that the early phases have the same or higher ratio of amenities as proposed in the entire project.*" The Planning Commission notes that the draft HOA governing instruments have obligations for the maintenance of the open space and other common amenities. The Planning Commission finds that there are adequate provisions for the maintenance of the open space and common areas and finds that this criterion of approval is satisfied.

2.5.6 The sixth criterion for approval of an Outline Plan is that is that "*The proposed density meets the base and bonus density standards established under this chapter*." The Planning Commission notes that density was discussed in the second approval criterion of annexation and restate those findings again here. The Planning Commission notes that the table at AMC 18.3.9.050 provides the residential density for a PSO subdivision, and that for the R-1-3.5 zone it specifies a residential density of 7.2 dwelling unit per acre. The Planning Commission notes that the subject property is 4.8 acres and concludes that the

allowed density for the subject property is 34.56. (4.8 x 7.2 = 34.56). The Planning Commission notes that the present proposal leverages affordable housing density bonus to exceed the base density for a total of 37 dwellings. The Planning Commission notes that AMC 18.3.9.050.B.3 provides a density bonus of two units for each affordable housing unit provided up to maximum bonus of 35-percent, this would allow for up to an additional 12 units over the based density. The proposed 37 dwellings utilize only 3 of the available bonus units for calculated bonus of 8.7%, which is well below the 35 percent available. The Planning Commission concludes that the proposed 37 dwellings are within the allowed base and bonus density standards and finds that this criterion of approval is satisfied.

2.5.7 The seventh Outline Plan approval criterion is that "*The development complies with the Street Standards.*" The Planning Commission notes that transportation facilities were discussed at length in the fifth approval criterion for annexation and restate them for the record here. The proposed development includes the creation of new local neighborhood roads connecting Engle Street, as well as a new neighborhood street connecting to Clay Street and that all proposed public facilities are proposed to be constructed to City of Ashland Standards. The Planning Commission notes that the application includes detailed civil engineering plans including street cross sections showing a 47' ROW, 22' paved width including seven-foot planter strip and five-foot sidewalk which meets the standards shown in Figure 18.4.6.040.G.4.b. 'Neighborhood Street, Parking One Side.' The Planning Commission notes that there are two locations on the preliminary plat and civil site plans that show only 46' feet of proposed ROW dedication. A condition of approval is included below that will require the revised civil plans at Final Plan approval to indicate 47' of ROW dedication. The Planning Commission finds that with the included condition of approval below that all proposed transportation facilities are built to the City Standards that this approval criterion is met.

2.5.8 The final criterion for approval of an Outline Plan is that is that "*The proposed development meets the common open space standards established under section 18.4.4.070. Common open space requirements may be satisfied by public open space in accordance with section 18.4.4.070 if approved by the City of Ashland.*" The Performance Standards Option Chapter requires that at least eight percent of the total lot area be provided in common open space for developments with a base density of ten units or greater. The Planning Commission notes that the proposed subdivision includes four open space areas totaling 16,102 square feet. The requirement for minimum open space for a PSO subdivision is five percent of total lot area for developments with a base density of 10 units or more. The subject property is 209,088 square feet in size, five percent of that is 10,454 square feet. Based on the calculation above the applicant is providing a total of 7.7% in open space which exceeds the required minimum and find that this approval criterion is met.

The Planning Commission concludes based on the above and finds that all applicable approval criteria for Outline Plan subdivision approval have been satisfied.

2.6 The Planning Commission finds that the proposal for a Water Resource Protection Zone (WRPZ) Limited Activities and Uses Permit meets all of the applicable criteria described in AMC

18.5.5.050 and as detailed below. As explained above the property has locally identified wetlands from the City's Local Wetland Inventory (LWI). The Planning Commission notes that the application states that based on the area of the wetland, the wetland is not a Significant Wetland, but a small, 418.76 square foot (.0096 acre) wetland area, as such they propose a twenty-foot buffer around this 419 square foot area. The Planning Commission notes that among the listed "limited activities and uses" that are allowed in the WRPZ area is the installation of public and private storm water treatment facilities. The application states that "*The proposed stormwater lateral dispersal trench is a permitted use within the Water Resource Protection Zone. The utility is outside of the wetland area and is proposed at the outer edge of the 20-foot wetland buffer zone.*", and that "*The areas of disturbance will be reseeded with a native grass mix that is appropriate for planting in the wetland buffer zone.*" The Planning Commission notes that all disturbance activities shall be as far away from the wetland as practicable. The Planning Commission further notes that the proposed storm water infrastructure is at the edge of the buffer area and concludes that the nature of the storm water system requires that it be within some proximity to the wetland. The Planning Commission notes that the proposal has been designed to minimize the excavation area, that the wetland is located on HOA open space, and that the long-term conservation will be ensured through the HOA management documents. The Planning Commission concludes based on the forgoing that the proposed storm water facility meets all the required approval criteria.

2.7 The approval criteria for "Tree that is not a hazard" first require that "*The tree is proposed for removal in order to permit the application to be consistent with other applicable Land Use Ordinance requirements and standards.*" The Planning Commission note that the application includes a request to remove four trees. The application describes the removals as follows: "*There are three deciduous trees that have a DBH of 12-inches or more that are proposed for removal and one tree conifer tree greater than 16 inches DBH. These trees are within the area of the public streets, the alley and within the building envelope area of the development area of the lots. The tree removal is necessitated by the construction of public streets, an alley and residential dwellings.*" (Applicant findings p. 46). The Planning Commission notes that to approve the removal of a non-hazard tree it needs to be shown that "*The tree is proposed for removal in order to permit the application to be consistent with other applicable Land Use Ordinance requirements and standards.*" The Planning Commission notes that the location of these trees being within the proposed street dedication and building envelopes, the proposed removals are found to meet the standards. The Planning Commission notes that the applicant will be required to mitigate for the removal of each tree and further notes that preliminary landscape plan, shows that the number of trees to be planted far exceeds the four that are required to mitigate these proposed removals. The Planning Commission find, based on the forgoing, that the applicable approval criteria are met.

2.8 The Planning Commission notes that following proper public notice, a public hearing was held on February 11, 2025, where testimony was received, and exhibits were presented.

2.8.1 The Planning Commission deliberated, and a motion was made to recommend approval to the City Council. The recommendation to approve the application was subject to the conditions of approval in the Staff Report along with added condition of approval: ""*That the final plan submittal shall identify a mix of bedrooms for the affordable units*

*comparable to the bedroom mix of the market rate units and include necessary deed restrictions to ensure compliance.*"

2.9 The Planning Commission notes that the record includes the applicant's submittal, the Staff Report, as well as the testimony received at the public hearing, each of these by their reference are incorporated herein as if set out in full.

2.9.1 The Planning Commission finds that there is substantial evidence in the record to make findings that each of the criteria of **approval** for annexation and Outline Plan have been met.

## SECTION 3. DECISION

3.1 Based on the record of the Public Hearings on this matter, the Planning Commission concludes that the request Annexation and Outline Plan Approval is supported by evidence contained within the whole record and forwards a recommendation of **approval** to City Council including the conditions of approval below.

The conditions of approval are below:

1) That all proposals of the applicant shall be conditions of approval unless otherwise specifically modified herein.
2) That the applicant applies for final plan approval pursuant to AMC 18.3.9.040.B within 18 months of this outline plan approval. The application for Final Plan approval will be required to include the following:
    a. That the revised civil and site plans that are to be submitted with Final Plan approval indicate 47' of ROW for both Engle and Street and Caldera Lane.
    b. Provide CC&R's for review that include sufficient maintenance for the private drive and all common area amenities.
    c. That pursuant to AMC 13.24.010.C that the applicant shall consult with the Public Works Director for approval of the proposed street name of Caldera Lane.
    ~~d. That the final plan submittal shall identify a mix of bedrooms for the affordable units comparable to the bedroom mix of the market rate units and include necessary deed restrictions to ensure compliance.~~
3) That permits shall be obtained from the Ashland Public Works Department prior to any additional work in the public right of way.
4) That a final survey plat shall be submitted within 12 months of Final Plan approval and approved by the City of Ashland within 18 months of this approval. Prior to submittal of the final subdivision survey plat for signature:
    a. All easements including but not limited to public and private utilities, public pedestrian and public bicycle access, drainage, irrigation, and fire apparatus access shall be indicated on the final subdivision plat submittal for review by the Planning, Engineering, Building and Fire Departments.

b. Subdivision infrastructure improvements including but not limited to utilities, driveways, streets and common area improvements shall be completed according to approved plans, inspected and approved.

c. Electric services shall be installed underground to serve all lots, inspected and approved. The final electric service plan shall be reviewed and approved by the Ashland Electric, Building, Planning and Engineering Divisions prior to installation.

d. That the sanitary sewer laterals and water services including connection with meters at the street shall be installed to serve all lots within the applicable phase, inspected and approved.

5) That a final Fire Prevention and Control Plan addressing the General Fuel Modification Area requirements in AMC 18.3.10.100.A.2 of the Ashland Land Use Ordinance shall be provided prior to bringing combustible materials onto the property, and any new landscaping proposed shall comply with these standards and shall not include plants listed on the Prohibited Flammable Plant List per Resolution 2018-028.

6) That the building permit submittals shall include the following:

a. Identification of all easements, including but not limited to any public and private utility easements, mutual access easements, and fire apparatus access easements.

b. For Lots #1-16 & 25 Solar setback calculations demonstrating that all units comply with Solar Setback Standard A in the formula [(Height –6) / (0.445 + Slope) = Required Solar Setback] and elevations or cross section drawings clearly identifying the highest shadow producing point(s) and the height(s) from natural grade.

c. For Lots #17-24 Demonstrate compliance with the approved solar setback showing that any shadows cast do not exceed five feet above the finished floor elevation of the main level of a house on the respective lots to their north, assuming the affected house is built six feet from the shared property line.

d. Final lot coverage calculations demonstrating how lot coverage is to comply with the applicable coverage allowances of the R-1-3.5 zoning district. Lot coverage includes all building footprints, driveways, parking areas and other circulation areas, and any other areas other than natural landscaping.

e. That storm water from all new impervious surfaces and runoff associated with peak rainfalls must be collected on site and channeled to the City storm water collection system through the curb or gutter at a public street, a public storm pipe, an approved public drainage way, or through an approved alternative in accordance with Ashland Building Division policy BD-PP-0029. On-site collection systems shall be detailed on the building permit submittals.

/s/ Lisa Verner _____ 3/11/2025 ____
Planning Commission Approval Date

# Council Business Meeting

**Date**: April 15, 2025

| | |
|---|---|
| **Agenda Item** | Resolutions related to Public Safety, Wildfire and Parks Fees |
| **From** | Sabrina Cotta, Mariane Berry, Finance Director |
| **Contact** | sabrina.cotta@ashland.or.us, mariane.berry@ashland.or.us |

## SUMMARY

Per the Study Session on March 31, 2025 and the guidance by City Council, Staff is presenting Resolution 2025-04 that will, if approved, increase the Public Safety and Wildfire Risk Reduction (previously, AFR - Ashland Forest Resiliency) fees.

Per the Study Session on March 31, 2025 and the guidance by City Council, Staff is presenting Resolution 2025-07 that will, if approved, establish a Parks Fee of $5.00.

## POLICIES, PLANS & GOALS SUPPORTED

Vision Statements of Success
Community -

- Environmental resilience, including addressing climate change and ecosystem conservation
- Belonging through mutual respect and openness, inclusion, and equity

Environmental Resilience, including addressing climate change and ecosystem conservation
Quality of life that underpins the City's economic vibrancy

Organization -

- Excellence in governance and city services
- Public safety, including emergency preparedness for climate change risk

Council Priorities for 23-25 Biennium

- Wildfire risk reduction
- Livability including Community Character, Parks & Recreation, and Mobility

## BACKGROUND AND ADDITIONAL INFORMATION

### PUBLIC SAFETY AND WILDFIRE FEES

Please refer to the Staff report on the Fees Discussion from the Study Session on March 31, 2025.

Based on the Study Session, Staff is putting forth a resolution to increase the Public Safety (PS) and the Wildfire Risk Reduction (WRR) fees in the City's utility billing statements. These fees have not increased since 2018 and 2019, respectively. Meanwhile, costs in the General Fund have continued to rise substantially due to inflationary pressures, while revenues have remained flat or have increased marginally by comparison. Public safety, which includes the Wildfire Division, is a large part of the General Fund. Due to community and council priorities for continued wildfire mitigation work and ambulance services, a dedicated fee source to cover this work will assist in ensuring these programs remain funded.

Resolution 2025-04, if approved, shall enact the following:

1. Increase the Public Safety fee from $1.50 to $5.00 for each electric meter
2. Increase the Wildfire Risk Reduction fee from $3.00 to $7.00 for each 3/4 inch water meter

3. Add an annual escalator such as CPI-U

*Public Safety Fee:*
The increase of the PS fee will transition the Emergency Medical Single Role program from a pilot program to permanent, four single-role positions. It will allow the division to continue to maintain the call volume response rate, which has increased this past year and a half since the program started.

*Wildfire Risk Reduction Fee:*
The revenue would fully fund the Wildfire Division in BN 25-27, retaining 2.0 FTE and adding a temporary 1.0 FTE to assist with continued work in the forest interface. It will allow for dedicated funding for ongoing mitigation work while also building a reserve for large-scale, one-time funding needs. A new Special Revenue fund will be created that will track this work and allow for funds to be restricted for these specified purposes, providing funding autonomy for the Wildfire Division to manage its own budget.

The continuity of these programs has been communicated as priorities by Council, and as such, having a dedicated funding source allows for a healthier rebalancing of the General Fund budget.

**PARKS FEE**
Please refer to the Parks & Recreation section of the Staff report on the Fees Discussion from the Study Session on March 31, 2025.

Ashland currently does not have a dedicated funding source for Parks and Recreation's operations and programs. It must compete with general government expenditures such as administration and overall public safety. Given the expansive and unrivaled parks, trails and open space system that Ashland maintains, along with such integral community programs such as Senior Services and the Nature Center, it has been necessary to implement a funding source for Parks in order to prioritize Council's vision statement of "being an open, welcoming community for all with a positive economic future". Our Parks system is integral to that vision.

The current biennial 25-27 budget is built with the $5 fee. Should the resolution not pass, additional staffing and programs will be cut. Please see attached Parks Budget Impact Table. Staff will discuss these implications in more detail during the presentation.

**FISCAL IMPACTS**
An increase from $1.50 to $5.00 for the Public Safety fee equates to $1,519,500 for the biennium. This is dedicated funding for the EMS Single Role Program.

An increase from $3.00 to $7.00 for the Wildfire Risk Reduction fee equates to $1,902,207 for the biennium. This is dedicated funding for the Wildfire Division.

Establishing a Parks Fee of $5.00 equates to $1,125,000 for the 25-27 biennium, and $750,000 annually ongoing, plus inflationary escalators. This is dedicated funding for the Ashland Parks and Recreation Department and will allow the current proposed budget for the department to go forth as part of the City's Proposed Budget, without any additional cuts to services and personnel.

**SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS**
Staff recommends approval of both resolutions.

I move to approve Resolution 2025-04 to increase the Public Safety Fee to $5.00 and the Wildfire Mitigation Fees to $7.00 with normal annual inflationary escalators.

I move to approve Resolution 2025-06 to establish a Parks Fee of $5.00 per electric meter, with normal annual inflationary escalators.

**REFERENCES & ATTACHMENTS**

1. CC Fees Discussion March 31, 2025
2. Parks Budget Impact Table
3. Resolution 2025-04 Public Safey_Wildfire Fees
4. Resolution 2025-07 Parks Fee

# Council Business Meeting

**March 31, 2025**

| | | |
|---|---|---|
| **Agenda Item** | Budget-Related Fees Discussion: Public Safety, Wildfire, and Parks | |
| **From** | Sabrina Cotta / Mariane Berry | City Manager / Finance Director |
| **Contact** | citymanagersoffice@ashlandoregon.gov, finance@ashlandoregon.gov | |
| **Item Type** | Requested by Council ☐ Update ☐ Request for Direction ☒ Presentation ☒ Consent ☐ Public Hearing ☐ New Business ☐ Unfinished Business ☐ | |

## SUMMARY

Like other cities in Oregon, overall governmental expenditures for the City of Ashland continue to rise more quickly than revenues. This pattern is anticipated to exacerbate in the coming biennium due to economic volatility at the national level, significant increases to health care and pension costs, restrictions on general fund revenue sources and likely reductions in federal grant funding.

This agenda item will focus on the Public Safety Fee, Ashland Forest Resiliency Fee and a potential Park Fee to support maintaining General Fund services at current levels over the next biennium. The discussion will include historical context, city comparables, and levels of service.

## POLICIES, PLANS & GOALS SUPPORTED

Administrative/Governance Goal:

"To ensure ongoing fiscal ability to provide desired and required services at an acceptable level."

**Vision and Values**

*Community*

- Quality of life that underpins the City's economic vibrancy

*Organization*

- Excellence in governance and city services
- Sustainability through creativity, affordability, and rightsized service delivery
- Public safety, including emergency preparedness for climate change risk
- Quality infrastructure and facilities through timely maintenance and community investment

## BACKGROUND AND ADDITIONAL INFORMATION

### BACKGROUND

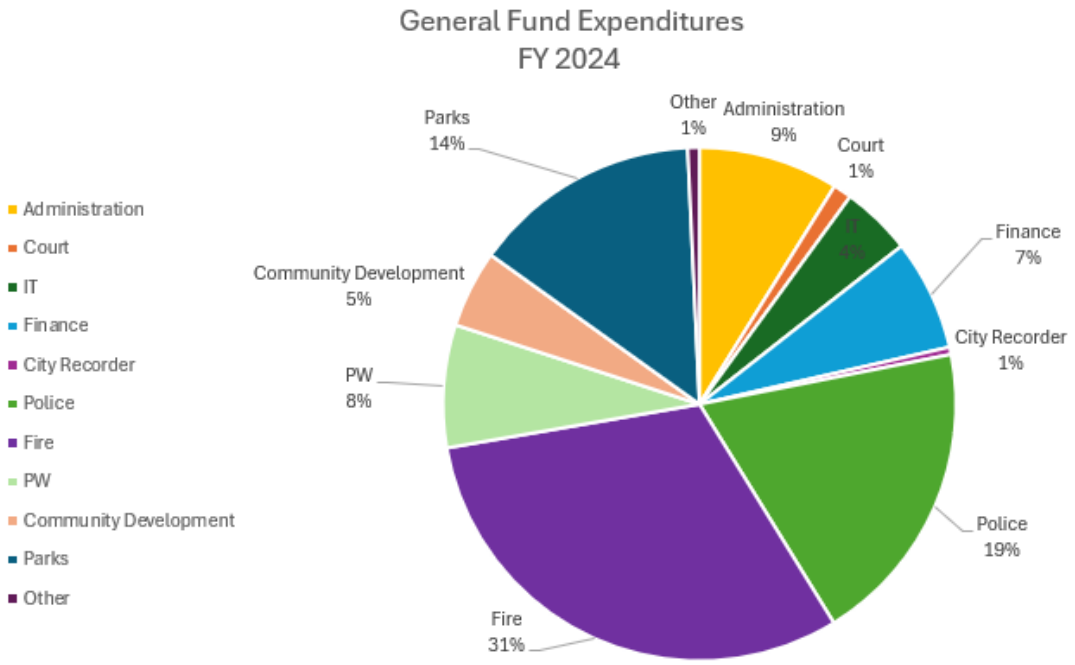
From 2015 to 2023, revenues increased, on average, by 4% annually, while expenses increased, on average, by 6% annually. Over the same period, our revenue streams have shifted to rely more heavily on fees due to property tax limitations that cap the growth of property taxes. These fees, like property tax revenues, have not kept up with the rising costs of services. Without adjusting our revenues from fees, it is anticipated that the City will need to reduce General Fund levels of service in BN25-27. Due to Oregon's Measure 50, all tax districts have a permanent rate limit, set at local assessed values from 1995-96 market levels, thereby capping growth. For Ashland, our current and capped permanent rate of 4.2865 has been set since 2019. Over the course of the last 10 years, property taxes, which

mainly fund governmental activities, have only increased $3.8M or 35%. Meanwhile, expenditures over the same period for governmental activities, not including Streets - public safety, parks and recreation, and general government administration - have increased by $21.6M, or 104%.

*Major General Fund Expenses*

This has left the City' General Fund to rely on other revenue sources that have also not kept up with the rising costs of services. As an example, since 2020 the Electric User Tax has only increased marginally since 2020, reflecting greater conservation initiatives with our community. Further, water rates have not increased since 2019, which has impacted the general fund through franchise fees. The Public Safety fee of $1.50 per electric meter has not increased since 2018, and the AFR fee of $3.00 per water meter since 2019. Finally, costs of maintaining our parks make up approximately 14% of the overall cost of general government services, which must compete with all other services within the shrinking pool of funds.

Also worth noting is that the last couple bienniums, the City received Covid grants and other state grants that will not be available for government services in this coming biennium. These large grants helped fund general government operations and specifically services for the unhoused.




**Fire & Rescue**

Fire & Rescue represents the largest costs to our General Fund at 31% of total General Fund expenditures. Fire & Rescue includes Operations, Life & Safety, Wildfire Mitigation, and Emergency Medical Services. This department has seen the highest increase in costs year over year due to the addition of Firefighter and single-role EMS roles in the FY24 budget. The addition of the EMS roles in the last biennium have addressed the call volume needs for Ashland, and, over the long run, the division has the potential to grow Ambulance Revenue that will aid in funding the department.

**Police**

Police represent 19% of the General Fund expenditures. While our police force has not grown significantly since 2017, the personnel costs impacting all departments - including cost-of-living adjustments, increases to pension costs, and increases to health care costs - have increased over the years.

**Parks & Recreation**

Parks & Recreation represented 14% of General Fund expenditure in FY24, the third costliest program after Police. Since 2015, Ashland park acreage has increased by 169 acres, for a total of 811 acres and has added 13 miles of trails, bringing the total to 53 miles in the Ashland trail system. The City has struggled to identify and maintain a dedicated funding mechanism for Parks & Recreation operations, historically making the Parks Department most vulnerable to cuts during difficult budget cycles.

*General Fund Fee Revenues*

**Public Safety Fee**

In April 2017, the City Council voted to approve the hiring of five additional police officers, with the intent to develop funding mechanisms later. Ultimately, funding was identified for 3 officer positions. Today, that funding only covers the cost of 2.5 officer positions, and additional funding is needed for supporting current ambulance service levels.

- In July 2017, a $0.50 Public Safety Fee was placed on every electric meter account which, in combination with newly appropriated state marijuana tax revenue, covered the cost of one Police Officer.
- In July 2018, the Public Safety Fee was increased to $1.50 to cover the cost of an additional Police Officer.
- In August 2018, the Transient Occupancy Tax was increased by 1%, 70% of which was to fund an additional Police Officer.
- Since 2021, reductions in tourism has decreased the amount of Transient Occupancy Tax collected.
- In 2022, Measure 110 reduced the annual State Marijuana Tax appropriations to local jurisdictions.
- Today, the combination of the Public Safety Fee, State Marijuana Tax appropriation, and Transient Occupancy Tax, covers the cost of 2.5 officer positions.
- Development of the single -role EMS program has increased the need to identify additional funding to support the program long-term.

Looking forward if the desire is to maintain the single-roll EMS program at its current level an increase in the public safety fee is necessary.

**Ashland Forest Resiliency Fee**

The Ashland Forest Resiliency (AFR) is a partnership program that brings many stakeholders together to decrease fire risk in the Ashland watershed. Historically, this work has majority been funded through large-scale grants, with the City covering all or some of the costs of City employees dedicated to the program.

- Prior to 2015, the City used unanticipated Water Fund revenues to pay roughly $175,000 a year to cover the costs of 1.7 employees working on the AFR program.
- In May 2015, City Council approved a new water bill charge based on meter size to generate $175,000 a year to shift those costs from the Water Fund. ($1.39 for a ¾ inch meter).
- In May 2019, City Council raised the water bill charge to increase revenue to $377,500 per year for the AFR program to cover an increase in personnel costs due to an increase in acreage ($3 for a ¾ inch meter).
- Since 2021, the AFR program has ~$450,000 in personnel costs per year, while the AFR fee regularly collects ~$377,500 per year. The City has been covering the cost gap through unanticipated revenues, such as interest income. Last BN a large scale tree removal required significant general fund resources.

Looking forward, if the desire is to maintain two dedicated staff people in the wildfire division and continue mitigation work versus education only work, an increase in the AFR fee is necessary.

**Parks Fee**

Ashland has no dedicated funding source for Parks & Recreation operations. Other jurisdictions have incorporated a Parks fee to address the increased and ongoing maintenance of city parks. Looking forward if the desire is to

maintain the current level of parks and move forward with the development of the East Main Park and the current level of senior center services the establishment of a parks fee is necessary.

**Fees in Other Jurisdictions**

The following table provides a comparative analysis of neighboring jurisdictions.

| CITY COMPARATIVES | | Ashland | Medford | Central Pt. | Talent | Grants Pass |
|---|---|---|---|---|---|---|
| Population | | 22,086 | 84,423 | 19,918 | 5,228 | 39,112 |
| Fees | Public Safety | $ 1.50 | $ 16.07 | $ 2.00 | $ 4.00 | $ 12.36 |
| | Parks | 0.00 | 5.35 | 6.00 | 8.43 | 0.00 |
| | Wildfire | 3.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | $ 4.50 | $ 21.42 | $ 8.00 | $ 12.43 | $ 12.36 |
| Aurhotized FTE | | | | | | |
| | Police | 39.00 | 130.70 | *31.00* | 10.65 | 57.00 |
| | Fire | 47.00 | 108.20 | *0.00* | 0.00 | 31.00 |
| | Parks | 37.00 | 70.00 | *7.15* | *4.00* | 28.00 |
| | | 86.00 | 238.90 | 31.00 | 10.65 | 88.00 |
| Parks Acreage | | 811 | 2,227 | not available | 36 | 196 |
| Number of Parks | | 20 | 37 | 9 | not available | 24 |
| Trails | | 53 | not available | not available | not available | not available |

Notes: Central Point FTE data based on 2021 ACFR, all else were pulled from the most current ACFR.
Talent Parks FTE derived from available reporting

**OTHER RELEVANT INFORMATION**

The City Council has identified livability and economic development as key areas for the community moving forward. Public safety and the Parks and Recreation Department will continue to be key elements in these identified priorities. The 25% of the Food & Beverage (F&B) tax currently goes to fund the Parks CIP Fund for capital improvements and property purchases. The F&B ballot measure in May 2023, had it been approved by the voters, would have assisted in funding overall Parks operations and maintenance, providing flexibility in spending and the capabilities to meet natural inflationary pressures.

Finally, Ashland prohibits the use of herbicides. Due to this, it takes multiple Parks employees to provide maintenance for city parks than it would with the use of herbicides.

**SUGGESTED ACTIONS, MOTIONS and/or OPTIONS**

Staff is presenting data to Council to discuss options for fee increases and establishing proper service levels for the identified areas. Based on Council direction, staff will return for the adoption of a resolution to increase the public safety and wildfire fees to properly fund corresponding desired service levels, and establishing a parks fee to ensure proper funding for corresponding desired service levels.

**REFERENCES & ATTACHMENTS**

>> attach resolutions

**Original Proposed Budget:** **$15,795,925** **39 staff**

| **5% Reductions Impacts (Required)** | **$15,200,000** | **37 staff** |
|---|---|---|
| Item | Impact | |
| Organization Restructure | Consolidation and re-classification of some positions to ensure we meet regulatory requirements and minimize future cuts | |
| Golf grill termination | Review potential outsourcing, will reduce costs and revenues | |
| Recreation Coordinator | • Reduction of (1) FTE, resulting in:<br>o No re-opening of Pioneer Hall & Community Center<br>o Pool – Open Wednesday thru Sunday only<br>o Ice Rink – Weekday closure, reduced hours on Weekends | |
| Seasonal Staff Reductions | • 50% reduction in seasonal staff for park operations<br>• Close 33% restrooms:<br>o Skate Park<br>o Garden Way<br>o Lithia (Cottonwood, 3rd Parking Lot, Bandshell, Swim Area (seasonal closure)<br>• Reduced services to neighborhood and community parks.<br>o Irrigation, mowing reductions<br>o Reduced vegetation management, etc.<br>• Reduction in VIP program related to volunteer work parties.<br>• Reduction in days that Garfield Splashpad can be open.<br>o Weekends and days that are over 90 degrees<br>• Reduction in ability to manage and assist events.<br>o No staff for restroom or trash and/or other services | |
| 50% reduction in Environmental Education | Layoff of (1) staff, closure of Nature Center (except for events, classes, etc.) and reduction to programming. Bear Creek Salmon Festival and Bird Day would be eliminated. | |
| Professional services, advertising Reduction | No recreation guides printed or mailed, etc. | |
| Park Fees increases | Sport Fields, Court Fees, use fees increased to offset some general fund usage | |
| **10% Reductions Impacts (If no Park Fee)** | **$14,450,000** | **34 staff** |
| Item | Impact | |
| Elimination of Env. Education Programs | Layoff of (1) staff, no programs (community gardens, education, salmon festival, etc.). Nature Center would be closed. | |

| | |
|---|---|
| Senior Center Reduced Services | 2 days per week for programming, reduction of (1) FTE |
| No East Main Park | Loss of $1 million grant, reduction of (1) FTE |
| Pool & Ice Rink Closure | Creates additional $350,000 in lost revenue |
| Operational Reduced levels | • Focus on fuels reduction and associated regulatory requirements.<br>o All restrooms are closed<br>o Splash pad closure<br>o Reductions to sport fields operations, etc. |

# RESOLUTION NO. 2025-04

**A RESOLUTION SETTING THE PUBLIC SAFETY SUPPORT FEE AND WILDFIRE RISK REDUCTION FEE (PREVIOUSLY AFR, ASHLAND FOREST RESILIENCY FEE) AND REPEALING RESOLUTION 2018-09 AND 2019-20.**

## RECITALS:

A. The City of Ashland operates water and electric utilities to provide all residential and commercial electric and water service within the City of Ashland.
B. The City of Ashland maintains a police and fire department that strive to provide excellent and full-service emergency services to the community.
C. Using the existing electric and water billing system to charge and collect a public safety support fee and wildfire mitigation fee is an equitable and reasonable way of generating additional revenue for the City's General Fund, allowing the City to better fund public safety resources.
D. Funds generated through this assessment will exclusively fund public safety and wildfire operations and activities, respectively.
E. In order to maintain and preserve these services, the City wishes to impose the following fees.

**THE CITY OF ASHLAND HEREBY RESOLVES AS FOLLOWS:**

SECTION 1. A Public Safety Support Fee of $5.00 shall be charged each month to each City of Ashland utility customer with an active electric meter to fund the Fire Department in the General Fund, for the purpose of Emergency Medical Services.

SECTION 2. A $7.00 per 3/4" meter surcharge and on each water meter per Section 2A below shall be added monthly to the bill of each Ashland water utility customer to provide as a Wildfire Risk Reduction Fee to fund the Wildfire Division.

A.

| Meter Size | Meter Fee |
|---|---|
| 1 | $7.00 |
| 1.5 | $19.10 |
| 2 | $28.02 |
| 3 | $52.04 |
| 4 | $79.06 |
| 6 | $154.12 |
| 8 | $244.19 |

SECTION 3. An annual escalator such as Consumer Price Index shall be applied on July 1st of each fiscal year to adjust for inflationary increases. The Finance Department shall use the escalator that is relevant and consistent with the City's practice of adjusting costs due to inflation.

SECTION 4. Clarification of Fee Nature and Enforcement.

(a) The Public Safety Support Fee and Wildfire Risk Reduction Fee are hereby designated as service charges and not taxes, special assessments, or systems development charges.

(b) The obligation to pay these fees arises solely from the use of and connection to City services and is the responsibility of the utility customer of record. These fees shall not be imposed upon property or property owners as a direct consequence of ownership.

(c) Nonpayment of these fees shall not result in a lien on real property and shall not be enforced through foreclosure, unless the customer of record on the utility bill is also the owner of the property.

(d) Nothing in this Resolution shall be construed to authorize the imposition of any charge subject to the limitations of Article XI, Sections 11 or 11b of the Oregon Constitution.

SECTION 5. This resolution is effective upon adoption.

This resolution was duly PASSED and ADOPTED this _____ day of _____, 2025 and takes effect upon signing by the Mayor.

_____
Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this _____ day of _____, 2025.

_____
Tonya Graham, Mayor

Reviewed as to form:

_____
Carmel Zahran, Assistant City Attorney

# RESOLUTION NO. 2025-07

**A RESOLUTION SETTING THE PARKS FEE.**

**RECITALS:**

A. The City of Ashland operates an electric utility that provides all residential and commercial electric service within the City of Ashland.
B. The City of Ashland Parks and Recreation Department provides and promotes recreational opportunities and preserves and maintains public lands.
C. Using the existing electric billing system to charge and collect a parks fee is an equitable and reasonable way of generating additional revenue for the City's General Fund, allowing the City to better fund its parks operations.
D. Funds generated through this assessment will exclusively fund Ashland Parks and Recreation in the General Fund.
E. In order to maintain and preserve these services, the City wishes to impose the following fee.

**THE CITY OF ASHLAND HEREBY RESOLVES AS FOLLOWS:**

SECTION 1. A Parks Fee of $5.00 shall be charged each month to each City of Ashland utility customer with an active electric meter to fund the Parks and Recreation Department in the General Fund.

SECTION 2. An annual escalator such as Consumer Price Index shall be applied on July 1st of each fiscal year to adjust for inflationary increases. The Finance Department shall use the escalator that is relevant and consistent with the City's practice of adjusting costs due to inflation.

SECTION 3. Clarification of Fee Nature and Enforcement.

(a) The Parks Fee is hereby designated as a utility service charge and not a tax, special assessment, or systems development charge.

(b) The obligation to pay this fee arises solely from the use of and connection to City electric utility services and is the responsibility of the utility customer of record. This fee shall not be imposed upon property or property owners as a direct consequence of ownership.

(c) Nonpayment of this fee shall not result in a lien on real property and shall not be enforced through foreclosure, unless the customer of record on the utility bill is also the owner of the property.

(d) Nothing in this Resolution shall be construed to authorize the imposition of any charge subject to the limitations of Article XI, Sections 11 or 11b of the Oregon Constitution.

SECTION 4. This resolution is effective upon adoption.

This resolution was duly PASSED and ADOPTED this _____ day of _____, 2025 and takes effect upon signing by the Mayor.

_____
Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this _____ day of _____, 2025.

_____
Tonya Graham, Mayor

Reviewed as to form:

_____
Carmel Zahran, Assistant City Attorney

# Council Business Meeting

**Date**: April 15, 2025

| | |
|---|---|
| **Agenda Item** | Second Reading ORD 3258 An Ordinance Amending AMC Chapter 10.30 to Prohibit Hazardous Fire Use |
| **From** | Tighe O'Meara, Police Chief |
| **Contact** | tighe.omeara@ashland.or.us |

## SUMMARY

**SUMMARY**

This ordinance amends AMC Chapter 10.30 by establishing a municipal offense for Hazardous Fire Use—unauthorized fire behavior that creates a substantial risk to persons or property but does not meet the threshold for reckless burning under state law (ORS 164.335).
At the first reading on April 1, 2025, the Council approved redlined changes recommended by staff. These changes clarified that:

- The use of portable cooking devices is not prohibited in designated areas unless fire restrictions apply.
- Campfires and cooking fires authorized under AMC 10.30.010 and 10.30.020 are exempt from the ordinance's general prohibitions on ignition sources in restricted areas.

In addition to incorporating those redlined edits, this final version includes two clarifying, non-substantive revisions made by legal staff after the first reading:

1. **Section 10.30.060(A)(1):**
   The list of fire-related risks now includes an **"or"** before the last item to clarify that each listed risk (escape, endangerment, or spread) is individually sufficient to constitute a violation. This avoids ambiguity and confirms that all alternatives are enforceable independently.
2. **Section 10.30.060(C):**
   An **"and"** was added to the list of enforcement actions to clarify that the Fire Marshal, Fire Chief, or Police Chief may exercise any one or more of the listed remedies (issuing citations, ordering extinguishment, or taking other action). This does not change enforcement authority but ensures clarity.

These final changes do not alter the substance or scope of the ordinance; they are purely clarifying in nature and ensure that the ordinance reads clearly and enforces as intended.

## POLICIES, PLANS & GOALS SUPPORTED

This amendment aligns with Ashland's public safety goals, particularly in addressing increasing wildfire risks. It also complements existing state and local fire regulations while ensuring effective municipal enforcement.

## BACKGROUND AND ADDITIONAL INFORMATION

The ordinance is intended to fill an enforcement gap in fire-related laws by allowing municipal prosecution where fires pose a public danger but do not trigger state statutes such as ORS 164.335 (Reckless Burning) or ORS 163.195 (Recklessly Endangering Another Person).

State law generally requires either actual property damage with market value or a specific threat to an individual to establish a criminal offense. This ordinance, by contrast, focuses on the hazardous use of fire itself—allowing the City to intervene when someone creates a serious risk through their conduct, even if no damage or injury has yet occurred.

In short, the ordinance enables the City to respond before harm is done, based on behavior that reflects poor judgment or disregard for safety under hazardous conditions.

The language draws upon models used by other cities—most notably Medford—but is tailored to Ashland's code structure and focuses on integration with AMC Chapter 10.30 (Controls on Open Burning).

**FISCAL IMPACTS**

- Minimal financial impact: Enforcement will be handled through existing Fire and Police resources.
- Potential cost savings: Preventing uncontrolled fires reduces emergency response and suppression costs.
- Restitution for response costs may be required for offenders under this ordinance.

**SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS**

Staff recommends that the Council approve the ordinance.
Recommended motion: "I move to approve the second reading and adoption of Ordinance No. 3258, as amended."

**REFERENCES & ATTACHMENTS**

1. Ordinance 3258-Hazardous Burning v2 (04-01-25)
2. Ordinance 3258-Hazardous Burning v2 (04-15-25)

# ORDINANCE NO. 3258

## AN ORDINANCE AMENDING AMC CHAPTER 10.30 TO PROHIBIT HAZARDOUS FIRE USE

Annotated to show deletions and additions to the Ashland Municipal Code sections being modified. Deletions are ~~**bold lined through**~~, and additions are **bold underlined.**

**WHEREAS,** Article 2. Section 1 of the Ashland City Charter provides:

> Powers of the City. The City shall have all powers which the constitutions, statutes, and common law of the United States and of this State expressly or impliedly grant or allow municipalities, as fully as though this Charter specifically enumerated each of those powers, as well as all powers not inconsistent with the foregoing; and, in addition thereto, shall possess all powers hereinafter specifically granted. All the authority thereof shall have perpetual succession.

**WHEREAS**, The City of Ashland recognizes the increasing fire danger posed by unauthorized or hazardous fire use, particularly in sensitive areas such as city parks, open spaces, and the Ashland watershed; and; and

**WHEREAS,** Existing state laws addressing reckless burning (ORS 164.335) require actual property damage of ascertainable market value, limiting enforcement in cases where a fire creates a serious risk but has not yet caused harm; and

**WHEREAS,** Oregon's endangerment statutes (e.g., ORS 163.195) require proof of substantial risk of serious physical injury to a specific person, which may not apply in fire-related incidents that endanger the general public, property, or natural resources; and

**WHEREAS,** Unauthorized small fires—especially in greenways, parks, and wildfire-prone areas—pose significant risks even before damage occurs; and

**WHEREAS,** The City Council finds that this ordinance is necessary to provide a municipal enforcement tool allowing for misdemeanor prosecution of hazardous fire use before it escalates to reckless burning or arson, therefore,

**THE PEOPLE OF THE CITY OF ASHLAND DO ORDAIN AS FOLLOWS:**

**SECTION 1. Amendment to AMC Chapter 10.30**

AMC Chapter 10.30 **Controls on Open Burning** is hereby amended at **10.30.005 Definitions,** to read as follows:

**10.30.005 Definitions**

The following words and phrases whenever used in this chapter shall be construed as defined in this section unless from the context a different meaning is intended.

A. "Fire Chief" means the City of Ashland Fire Chief or the Chief's representative.

B. "Campfire" means any fire for cooking located outside of a building or recreational vehicle.

C. "Outdoor fire" includes any fire except a fire for cooking.
D. "Person in charge" means a person or a representative or an employee of a person who has lawful control of the site of the fire by ownership, tenancy, official position or other legal relationship.
E. "Ventilation index" means the National Weather Service's indicator of the relative degree of air circulation in the Rogue Valley.
F. "Noxious weed" means any plant classified by the Oregon State Weed Board that is injurious to public health, agriculture, recreation, wildlife, or any public or private property.

**For the purposes of this chapter, nothing shall be construed to prohibit the lawful use of portable cooking devices, such as propane stoves or grills, in designated picnic or recreation areas, unless otherwise restricted due to declared fire danger or burn bans.**

**SECTION 2.** Amendment to **10.30.060 – Hazardous Fire Use Prohibited**, to read as follows:

**10.30.060 Hazardous Fire Use Prohibited**

**A. Prohibited Conduct**
**It shall be unlawful for any person to:**

1. **Ignite, maintain, or allow a fire in a manner that creates a substantial risk of:**
    a. **The fire escaping control;**
    b. **Endangering persons, structures, or property;**
    c. **Spreading to public lands, forested areas, or designated fire-prone zones.**
2. **Fail to take reasonable measures to confine, control, or extinguish an authorized fire before leaving the area.**
3. **Operate any ignition source, including open flames, spark-producing devices, or heat-generating equipment (such as stoves, heaters, or any device capable of igniting nearby combustible materials) in a prohibited area, except where such use is authorized under this chapter, including but not limited to cooking fires and campfires as permitted under AMC 10.30.010 and 10.30.020. Prohibited areas include, but are not limited to:**
    a. **City-owned parks, open spaces, or wildfire-prone lands**
    b. **Any area subject to a burn ban or emergency restriction, or order of the Fire Chief or Fire Marshal.**
4. **Burn prohibited materials, including but not limited to:**
    a. **Plastics, chemicals, treated wood, tires, or any material producing toxic emissions.**
    b. **Unauthorized debris or waste without a valid permit.**
5. **Refuse or fail to comply with an order from the Fire Chief, Fire Marshal, or law enforcement to extinguish or control a fire.**

**B. High-Risk Areas and Aggravated Offenses**

**1. A violation of this section shall be considered an aggravated offense subject to enhanced penalties when:**
    a. **The hazardous fire use occurs in city-owned parks, watershed lands, or greenways.**

b. **The offense takes place during a declared fire season or under emergency fire restrictions.**
c. **The fire is left unattended and requires an emergency response from the Fire Department.**

**C. Enforcement and Authority**

1. **The Fire Marshal, Fire Chief, Police Chief, or their designees shall have the authority to:**
   (a) **Issue citations;**
   (b) **Order the immediate extinguishment of a fire;**
   (c) **Take additional enforcement action as necessary.**
2. **Failure to comply with a lawful order to extinguish or control a fire may result in immediate municipal prosecution.**

**SECTION 3. Amendment to AMC 10.30.050 (Penalties and Schedule)**
AMC 10.30.050 **Penalties and Schedule** is amended as follows:

10.30.050 Penalties and Schedule
A. Any person who violates any provision of this Chapter is subject to Section 1.08.020 of the Ashland Municipal Code.

1. Any violation of this section is a Class I Violation.
2. Outdoor burning without a permit or a campfire in violation of this chapter is a public nuisance and may be abated per AMC Chapter 1.08 by the Fire Chief, Chief of Police, or their representatives.
3. **A violation of AMC 10.30.060 (Hazardous Fire Use) shall be enforced as follows:**
   **a. Class 1 Violation – A general violation shall be subject to a fine of up to $500 (AMC 1.08.030B.**
   **b. Class B Misdemeanor – An offense in a high-risk area or during fire season, or by a repeat offender, shall be subject to:**
   i. **A fine up to $500.**
   ii. **Up to 60 days imprisonment. (Ashland Charter Art IX, Sec 1)**
   iii. **Mandatory fire prevention education or community service.**
   iv. **Restitution – Offenders may be required to reimburse emergency response costs.**

**SECTION 4. Remaining Provisions Unaffected.** Except as specifically amended herein, all remaining provisions of AMC Chapter 10.30 shall remain in full force and effect.

**SECTION 5. Severability.** Each section of this ordinance, and any part thereof, is severable, and if any part of this ordinance is held invalid by a court of competent jurisdiction, the remainder of this ordinance shall remain in full force and effect.

**SECTION 6. Codification**. Provisions of this Ordinance shall be incorporated in the City Code and the word "ordinance" may be changed to "code", "article", "section", "chapter" or another word, and the sections of this Ordinance may be renumbered, or re-lettered, provided however

that any Whereas clauses and boilerplate provisions (i.e. Sections 3-5) need not be codified and the City Recorder is authorized to correct any cross-references and any typographical errors.

The foregoing ordinance was first read by title only in accordance with Article X, Section 2(C) of the City Charter on the 2nd day of April, 2025, and duly PASSED and ADOPTED this 15th day of April, 2025

PASSED by the City Council this _____ day of April, 2025.

ATTEST:

_____
Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this _____ day of April, 2025.

_____
Tonya Graham, Mayor

Reviewed as to form:

_____
Douglas M. McGeary, Acting City Attorney

# ORDINANCE NO. 3258

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2. **Fail to take reasonable measures to confine, control, or extinguish an authorized fire before leaving the area.**
3. **Operate any ignition source, including open flames, spark-producing devices, or heat-generating equipment (such as stoves, heaters, or any device capable of igniting nearby combustible materials) in a prohibited area, except where such use is authorized under this chapter, including but not limited to cooking fires and campfires as permitted under AMC 10.30.010 and 10.30.020. Prohibited areas include, but are not limited to:**
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PASSED by the City Council this _____ day of April, 2025.

ATTEST:

_____
Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this _____ day of April, 2025.

_____
Tonya Graham, Mayor

Reviewed as to form:

_____
Douglas M. McGeary, Acting City Attorney

# Council Business Meeting

**Date**: April 15, 2025

| | |
|---|---|
| **Agenda Item** | 2025-2027 Transient Lodging Tax (TLT) Revenue Use for Tourism Promotion |
| **From** | Jordan Rooklyn |
| **Contact** | jordan.rooklyn@ashland.or.us |

## SUMMARY

Continuation of City Council discussion on the proposed use of Transient Lodging Tax (TLT) revenues to promote tourism in BN25-27.

## POLICIES, PLANS & GOALS SUPPORTED

Community Value: Quality of life that underpins the City's economic vibrancy.

## BACKGROUND AND ADDITIONAL INFORMATION

The City collects a 10% Transient Lodging Tax (TLT) on temporary or short-term lodging within Ashland's city limits. Roughly 30% of the revenues collected are reinvested into supporting and growing tourism.

On March 17, 2025, at the City Council study session, City Council discussed the approach for the use of TLT funds in the upcoming biennium. A draft strategy and specific projects linked to tourism promotion were presented to City Council for feedback and discussion at the April 1, 2025, regular business meeting. This agenda item is a continuation of that discussion, and the feedback heard will help shape the proposed BN25-27 budget.

## FISCAL IMPACTS

None

## SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

Discussion opportunity to provide feedback on proposed projects for BN25-27 tourism spending

## REFERENCES & ATTACHMENTS

1. Proposed TLT Strategic Plan_BN25-27
2. Proposed TLT Expenditures_BN25-27

# City of Ashland Tourism Promotion Strategy

## MISSION

Grow overnight visitors for a vibrant, year-round economy.

## VISION

Ashland achieves year-round economic growth through strategic coordination and exceptional visitor experience.

## DESIRED OUTCOMES

- Maintain summer tourism
- Increase tourism from November through May, with particular emphasis on January, February, and March
- Diversify tourist persona

## KEY METRICS

*Overarching*

- Visitor-Days Volume
- Overnight Visitor Volume
- Visitor Spending
- Visitor Demographics

*Programmatic*

- Hotels Booked via Campaign/Program
- Tickets Booked via Campaign/Program

## STRATEGIES

- Develop and implement a strategic marketing plan with other local organizations that have significant visitor draw.
- Market Ashland to visitors within a 2- to 6-hour drive (drive market), with direct flights to Medford, and within channels that attract identified tourist personas.
- Increase the ability of local businesses to market to and attract visitors.
- Invest in infrastructure that increases our capacity to host tourists and/or improves visitor experience.
- Identify, recruit, and host events that serve 300-800 people and align with new or growing tourist personas.
- Keep dollars local.

DRAFT

| BN25-27 Proposed TLT Projects | FY26 | FY27 |
|---|---|---|
| ***Expected Revenue*** | $ 900,000 | $ 900,000 |
| ***Expected Expenditures*** | $ 911,000 | $ 886,000 |
| *Destination Marketing* | | |
| Destination Marketing | 350,000 | 350,000 |
| Business Marketing Program | 50,000 | 50,000 |
| *Visitor Experience* | | |
| Downtown Cleaning | 37,000 | 37,000 |
| Seasonal Downtown Beautification | 34,000 | 34,000 |
| Chamber Programs: Visitor Guide, Volunteer Greeter Program | 15,000 | 15,000 |
| *Infrastructure* | | |
| Pedestrian Wayfinding | 100,000 | - |
| Parking Infrastruture | - | 100,000 |
| Public Art | 25,000 | 25,000 |
| Outdoor Rec Shuttle Program | 5,000 | 5,000 |
| *Events & Attractions* | | |
| Event Partnership Grant & Event Recruitment | 150,000 | 150,000 |
| City Band | 15,000 | 15,000 |
| Event Calendar | 50,000 | 15,000 |
| Festival of Light | 15,000 | 15,000 |
| *Overhead* | | |
| .25 FTE | 40,000 | 40,000 |
| Data, Analytics & Research | 25,000 | 35,000 |

# Council Business Meeting

**Date**: April 15, 2025

| **Agenda Item** | Proposed Changes to Enhanced Law Enforcement Area Process |
|---|---|
| **From** | Tighe O'Meara, Police Chief |
| **Contact** | tighe.omeara@ashland.or.us |

**SUMMARY**

Staff is coming back before Council to seek direction on possible changes to the expulsion process within an Enhanced Law Enforcement Area.

**POLICIES, PLANS & GOALS SUPPORTED**

N/A

**BACKGROUND AND ADDITIONAL INFORMATION**

Currently, under Ashland Municipal Code (AMC) 10.30.020, a chronic offender may be expelled from an Enhanced Law Enforcement Area (ELEA) after being convicted of at least three qualifying violations, or after being convicted of two crimes and one qualifying violation, or three crimes. While this framework has been a useful tool since its adoption in 2012, it is slow to respond to actual chronic negative behavior. In practice, it allows harmful behavior to go unaddressed while the offender continues to negatively impact the community. It can take several months for a criminal case to move through the court system, and violation-level offenses often take weeks or even months to reach conviction. Until that time, no expulsion can be sought through the municipal court by the City Attorney's Office.

Other communities have adopted expulsion ordinances that allow officers to issue an exclusion after a single qualifying violation—without waiting for a conviction. While that model may work for other jurisdictions, it is not the right approach for Ashland. At the same time, Ashland's current ordinance does not adequately address ongoing negative behavior that diminishes quality of life and creates an unsafe environment for all.

Staff proposes amending the AMC to allow a law enforcement officer to petition the municipal court judge directly for an expulsion order when the officer is aware of at least three qualifying violations committed within an ELEA, or at least one qualifying crime. The officer would present evidence of the substantiated offenses and affirm that the individual had been advised of the potential consequences of continued negative behavior.

Qualifying violations would include:

- AMC 10.40.030 – Consumption of alcoholic liquors in public places
- AMC 9.16.010 – Dogs, control required
- AMC 10.40.030 – Open containers (of alcohol) prohibited
- ORS 475B.381 – Use of marijuana in public place prohibited
- AMC 9.08.110 – Scattering rubbish
- AMC 9.08.170 – Unnecessary noise

Under the proposed procedure, when an officer issues a citation or makes an arrest for a qualifying offense within an ELEA, the officer would also provide the individual with written notice

explaining the potential consequences of continued violations. When the threshold for petitioning the court is met, the officer would submit a request to the municipal court judge, summarizing the prior violations or crimes and confirming that the individual had received the advisory.
If the court issues an expulsion order, the individual would be notified and instructed to leave and not return to the ELEA. The person would have **10 days to appeal** the expulsion order, which would remain in effect unless and until reversed by the court.
The proposed expulsion periods are:

- 60 days for violation-level offenses
- 90 days for misdemeanor-level crimes
- 180 days for felony-level crimes
-

This approach achieves the efficiency that the current system lacks by allowing the City to respond quickly to public safety concerns and chronic behavior—without short-circuiting due process. By placing the decision in the hands of the court, a neutral and independent authority, the proposed process ensures that expulsion is imposed only when the legal threshold is met and that each case is evaluated fairly based on its individual circumstances. It preserves the fundamental rights of the individual while addressing harmful conduct in a timely and responsible manner.

**FISCAL IMPACTS**

There should not be a financial impact for this change, as the ability to expel a chronic offender already exists. This is a procedural change. There is a perception with some that expulsion order violators are exclusively lodged in jail beds paid for via the City's contract with the County to rent jail beds. This is inaccurate information. Expulsion order violators, like any person arrested for a municipal court misdemeanor, generally do not trigger a rented jail bed.

**SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS**

Staff requests Council give direction on whether proposed changes should be brought back before Council at a later date,

**REFERENCES & ATTACHMENTS**

1. ELEA 2.19.25
2. Final ELEA 02192025
3. 2024-11-19 Council Meeting
4. ELEA PP

# Council Study Session

**Date:** February 19, 2025

| | |
|---|---|
| **Agenda Item** | Enhanced Law Enforcement Area Changes |
| **From** | Tighe O'Meara, Police Chief |
| **Contact** | tighe.omeara@ashland.or.us |

## SUMMARY

Staff is bringing forward information to further the discussion around amending the Enhanced Law Enforcement Area (ELEA) ordinance. Council recently authorized the application of the current ELEA framework to the Ashland Street business corridor. Staff is bringing information in support of modifying the current ordinance to allow for more flexible response for APD officers to address chronic negative behavior.

Legal staff will also bring forward information on other cities' efforts to offer similar solutions, as well as providing options to allow for more tools to address incidents of reckless/unauthorized burning.

## POLICIES, PLANS & GOALS SUPPORTED

NA

## BACKGROUND AND ADDITIONAL INFORMATION

The ELEA framework has been part of Ashland Municipal Code since 2012. While this has been an effective tool in addressing chronic negative behavior, it has also proven to have some pitfalls that do not allow for officers to efficiently address chronic negative behavior.

## FISCAL IMPACTS

The police department has a contract with the Jackson County Sheriff's Office to rent up to three jail beds at a cost of $110 per night per bed. However, a person arrested under this ordinance is not automatically placed a jail bed pursuant to that contract. An arrest that does not fall under that contract does not incur any additional cost for the City.

## SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

Staff is seeking Council direction on how to proceed, if at all, on changes to the ELEA and other related ordinances.

## REFERENCES & ATTACHMENTS

None

# Enhanced Law Enforcement Area

Chief Tighe O'Meara
February 19, 2025

Overview

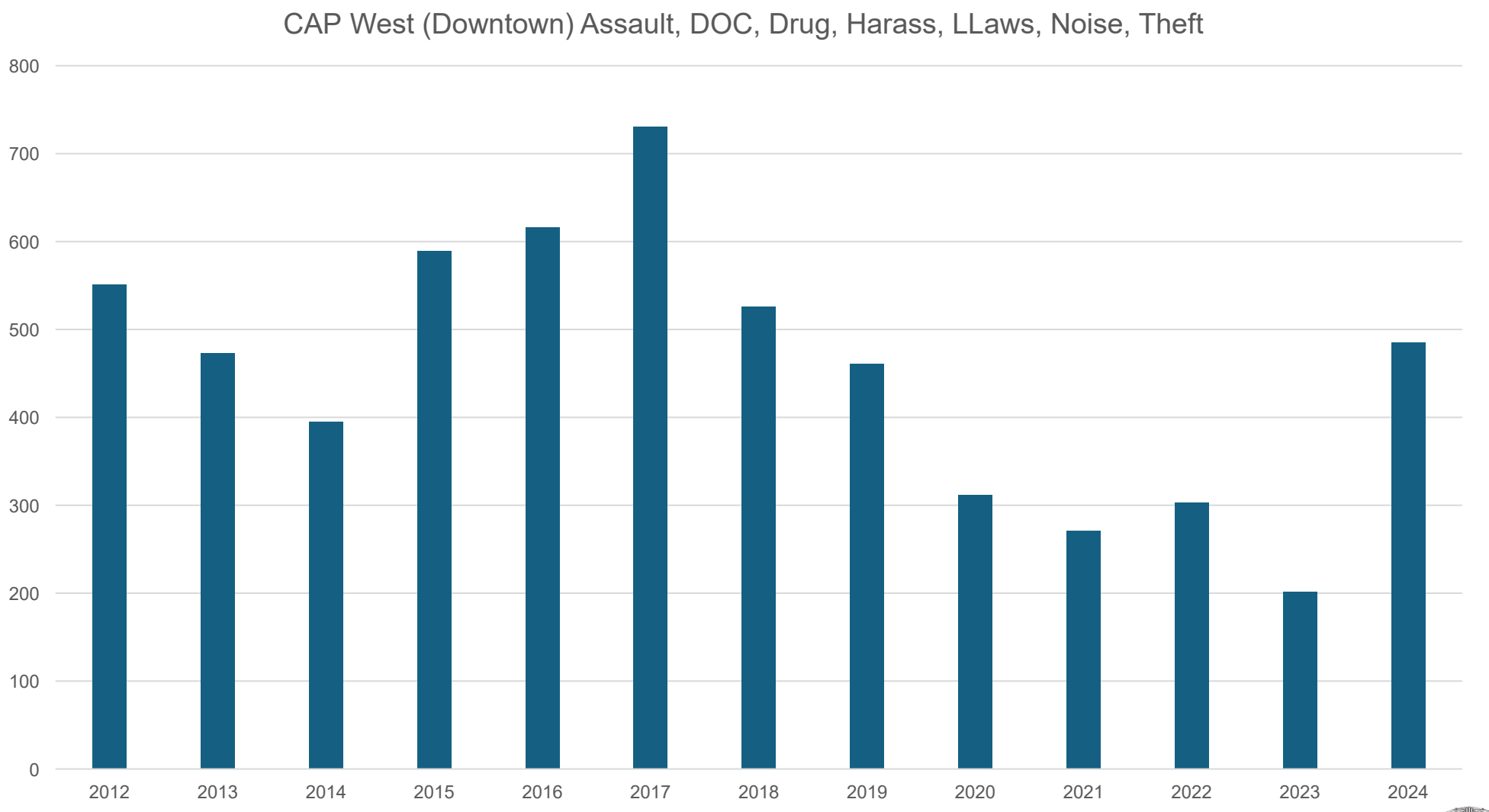
# Today's conversation

Crime Data

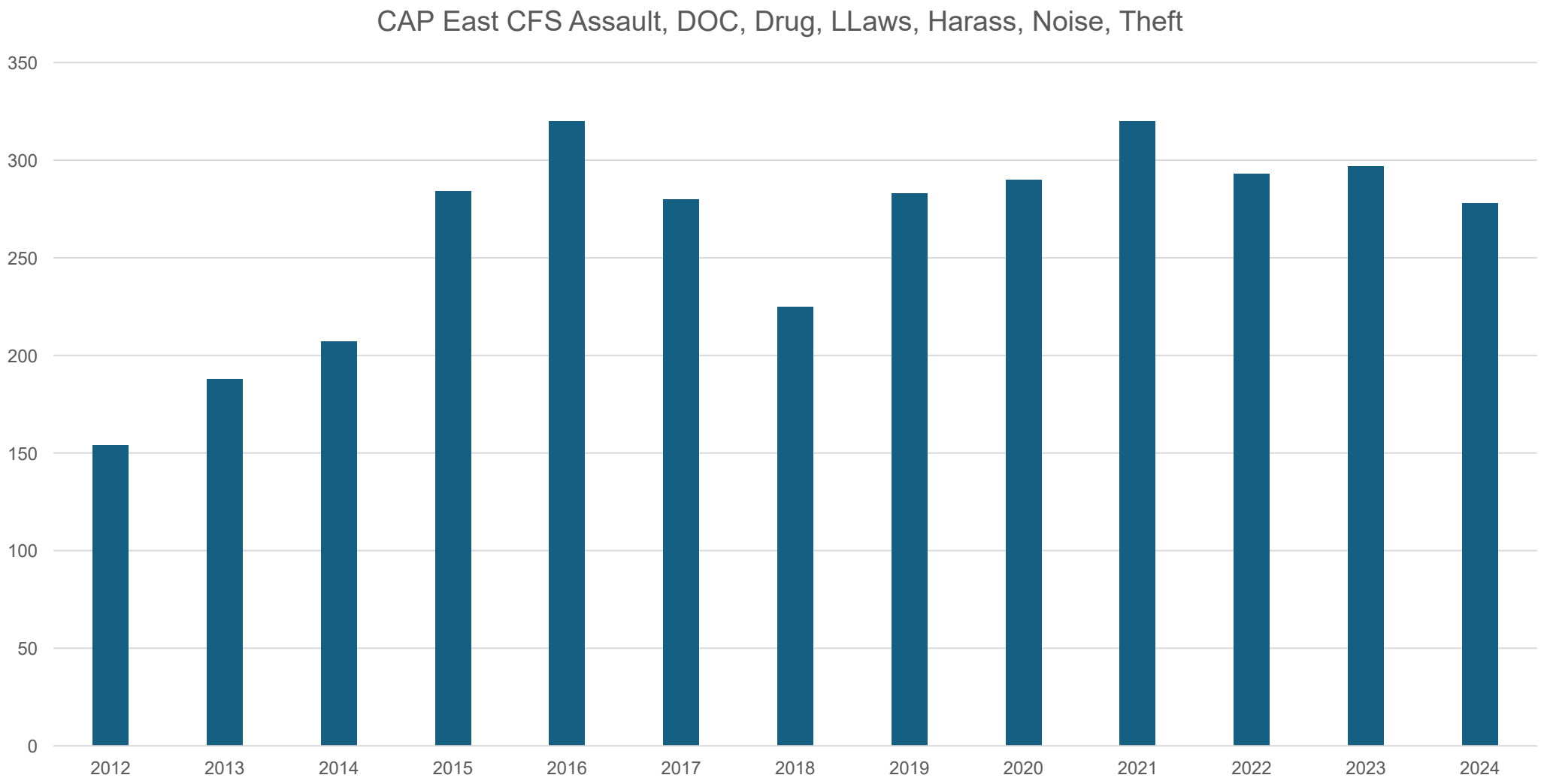
Current Issues with ELEA+potential changes

Legal topics

# CAP West Data



# CAP East Data



# Definitions

"Unlawful" does not automatically mean a crime

Crime: something that is unlawful and that might result in a period of incarceration in a jail or prison (e.g. assault, robbery, DUI)

Violation: something that is unlawful that can only result in an administrative sanction (e.g. drinking in public, unnecessary noise, smoking downtown)

Current ELEA

# Current ord. is based on multiple ***convictions***

- 3 or more qualifying violation convictions or at least 2 crime convictions. (Qual. Vio. =scattering rubbish, noise, dogs control, open cont., drinking in public, dog license)
  - This can take at least several weeks, to 2-3 months best case scenario
- There is one person who is chronic offender in the DT area with multiple crime charges pending going back over a year

Current ELEA

# Current ord. is based on multiple ***convictions***

- Examples
  - Person A: if expelled from CAP E in February of 2024 based on an arrest could have avoided 10 additional actions with throughout the rest of 2024
  - Person B: if expelled from CAP E in January of 2024 after 3 qualifying violations could have avoided 11 additional actions throughout the rest of 2024
  - Person C: if expelled from CAP W in January of 2024 after an arrest could have avoided six additional incidents in 2024

Better Together

Current ELEA

# Current ord. is based on multiple ***convictions***

- Examples
  - Person D: if expelled from CAP E in February of 2024 for an arrest could have avoided 10 additional cases in 2024
  - Person E: if expelled from CAP W in May 2024 after 3 qualifying violation could have avoided eight additional incidents in 2024 including two assault charges
  - Person F: if expelled from CAP E in February of 2024 for an arrest could have avoided eight additional incidents in 2024
  - Person G: if expelled from CAP E in April of 2024 for an arrest could have avoided eight additional incidents in 2024

Better Together

Proposed ELEA

# Proposed changes

- 3 or more violation qualifying charges (violations), expelled on an officer's authority, with an option to appeal to the Judge within 10 days
- 1 or more criminal charges (any court) with option to appeal to the Judge within 10 days

*Built in access to shopping, medical, work, services, etc. would only apply if person is "remaining in" and not going to or from*

Better Together

Current Parks

# Proposed changes

Officers have had the authority to expel from parks for rules violations for a long time. There has never been a complaint of them targeting anyone or applying that authority inequitably. Like the current and proposed ELEA ord., this authority is reactive to objective behavior witnessed by the officer.

Officers also have the ability to order someone to refrain from stalking a victim, issue a stalking citation which requires an appearance at Circuit Court, and in the meantime prohibits more stalking behavior

Current Parks

# Current Appeal

## Notice of Expulsion

### Warning of Consequences

No person shall knowingly enter or remain in the sleeping area at any time in violation of an expulsion order as issued and served upon the person. Entering the sleeping area in violation of an expulsion order constitutes Criminal Trespass in the Second Degree (ORS 164.245), which is a class C misdemeanor and may result in your arrest.

### Appeal Process

The person receiving this notice may appeal within 10 days in accordance with AMC 2.30 to have written notice rescinded or the period shortened. The appeal notice shall include a statement of the nature of the decision being appealed and a short and plain narrative statement, including the reason the original decision is alleged to be incorrect. The written appeal should be delivered to: City Recorder, 20 East Main Street, Ashland, Oregon, 97520.

The Hearing Officer shall uphold the expulsion if, upon de novo review, the preponderance of the evidence convinces the Hearing Officer that, more likely than not, the person in fact committed the crime or violation, and that the expulsion is otherwise in accordance with law.

Unless the basis for the expulsion involves a safety concern, if an appeal of the expulsion is timely filed under AMC 2.30, the effectiveness of the expulsion shall be stayed, pending the outcome of the appeal. If the expulsion is affirmed, the expulsion shall be effective immediately upon issuance of the written decision and then shall commence and run for the specified number of days thereafter.

### Expulsion Periods

Any peace officer or city code compliance officer may expel any person who violates any applicable provision of law in the Dusk to Dawn Sleeping Area for a period of up to 30 days but not to exceed six months.

CITY OF ASHLAND

ASHLAND POLICE DEPT. Tel: 541-482-5211
1155 E. Main St. Fax: 541-488-5351
Ashland, OR 97520 TTY: 800-735-2900

## Notice of Expulsion

### Warning of Consequences

No person shall knowingly enter or remain in any park at any time in violation of a park expulsion order as issued and served upon the person in accordance to AMC 10.68.350. Entering a park in violation of an expulsion order constitutes Criminal Trespass in the Second Degree (ORS 164.245), which is a class C misdemeanor.

### Appeal Process

The person receiving this notice may appeal within 10 days in accordance with AMC 2.30 to have written notice rescinded or the period shortened. The appeal notice shall specify the relief sought and the reason for said relief. The written appeal should be delivered to: City Recorder, 20 East Main Street, Ashland, Oregon, 97520.

The Hearing Officer shall uphold the expulsion if, upon de novo review, the preponderance of the evidence convinces the Hearing Officer that, more likely than not, the person in fact committed the crime or violation, and that the expulsion is otherwise in accordance with law. If an appeal of the expulsion is timely filed under AMC 2.30, the effectiveness of the expulsion shall be stayed, pending the outcome of the appeal. If the expulsion is affirmed, the expulsion shall be effective immediately upon issuance of the written decision and then shall commence and run for the specified number of days thereafter.

### Expulsion Periods

Any peace officer, or park official or city code compliance officer may expel any person who violates any applicable provision of law in a city park from any or all city parks for a period of 30 days for any violation or for a period not to exceed the maximum jail period for any particular criminal offenses. If the person to be expelled from any park has been expelled from a city park on two or more occasions within two years before the date of the present expulsion for criminal offenses, the expulsion shall be for a period not to exceed 180 days.

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Better Together

Current Fire

# Current AMC and ORS on fires

AMC 10.30.010 Unauthorized Burning-violation

ORS 164.335 Reckless Burning-misdemeanor but can’t be charged unless damage to real property has been established

Proposed Fire

# Current AMC and ORS on fires

Elevate AMC 10.30.010 to a Municipal Court misdemeanor

# Defensibility

Medford has officer-based expulsions, it has been challenged in federal court and upheld in the case Bilodeau v. City of Medford

The same language the federal Judge leaned on to uphold the case has been included in the previous proposed draft.

Other Communities

# These cities have some form of expulsion ordinance in place

Brookings
Canby
Corvallis
Cottage Grove
Eugene
Gresham
Hillsboro
Lake Oswego
Lincoln City
McMinnville
Medford
Milwaukie
Oregon City
Reedsport
Roseburg
Salem
Silverton
Tigard
Tualatin

# Metrics

Trying to minimize crimes and calls for service for negative behavior in a way that maintains fairness and equity for all, while allowing the police officers flexibility to address ongoing negative behavior concerns

# Clarification

Some people have incorrectly conflated the rented jail beds with persistent violator arrests, these are not the same thing.

Recommended

There are four recommendations, which can be taken as a whole or individually:

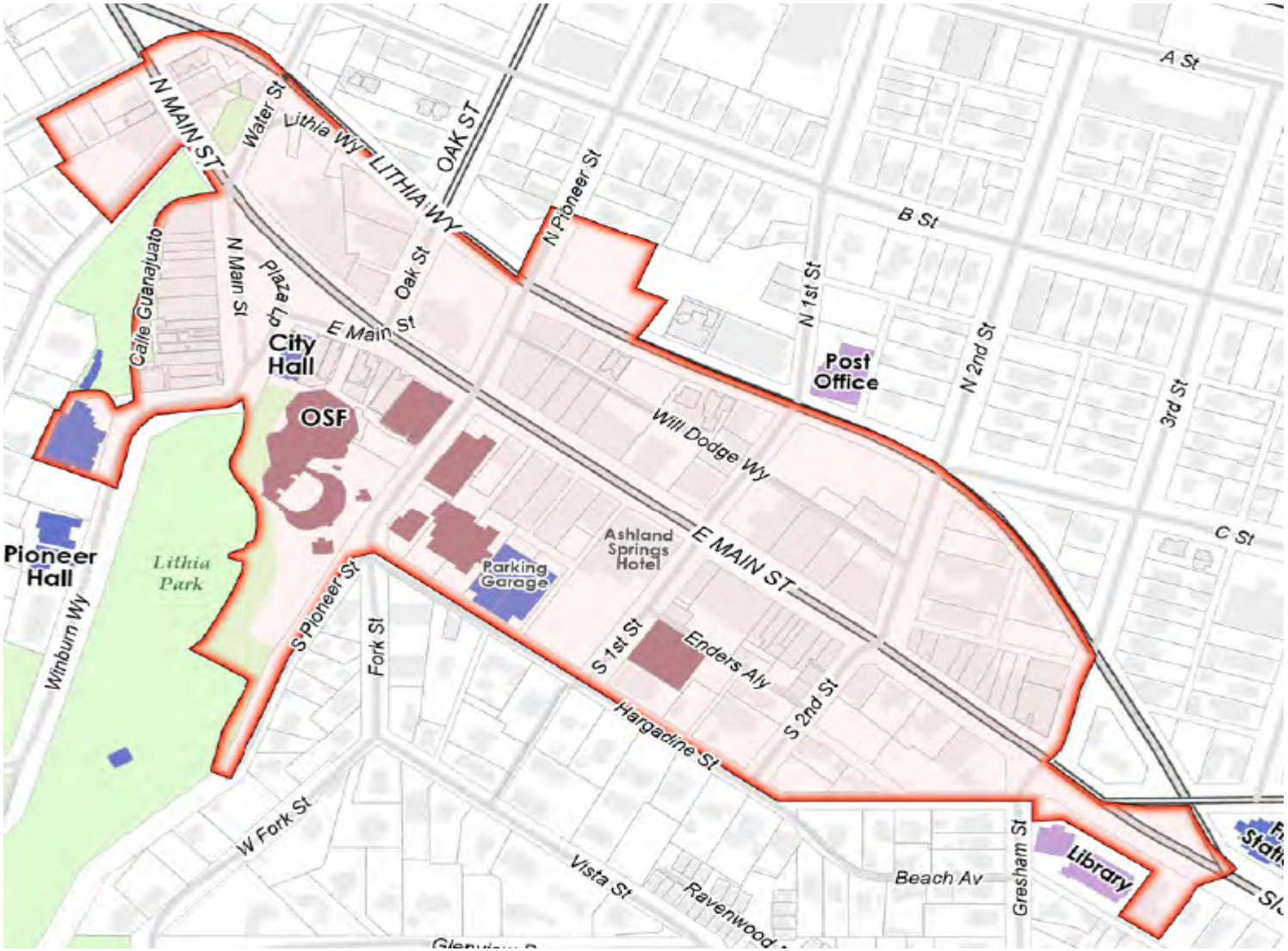
1. Allow for expulsions on officer's order for 3 or more qualifying violations issued, with judicial review within 10 days if the subject asks for it
   open intoxication, drinking in public, marijuana in public, scattering rubbish, unnecessary noise, dogs-control required (note that these are violations anywhere in the City)

2. Allow for crimes charged in an ELEA to lead to expulsion
   Misdemeanor 90 days, felony 180 days

3. Elevate unauthorized burning to a municipal court misdemeanor

4. Slight expansion of ELEA West (downtown) area to include the front lawn of the library, and adjacent property, and the park area across the street

# Recommended



# QUESTIONS?

# Council Business Meeting

Date: November 19, 2024

| Agenda Item | First Reading ORD 3251 Repealing and replacing AMC Chapter 10.120 – Persistent Violations |
|---|---|
| From | Tighe O'Meara, Police Chief |
| Contact | tighe.omeara@ashland.or.us |

## SUMMARY

This proposed ordinance amends the current "Persistent Violator" ordinance. Right now, in the current ordinance, law enforcement must wait to expel someone from an Enhanced Law Enforcement Area (ELEA) until that person is convicted of multiple violations and convictions prior to asking the Judge for expulsion. This ordinance changes so that a law enforcement officer can expel someone from an ELEA if the officer has probable cause to believe that the offense occurred in that zone. If the person returns after being expelled, and an exception or variance does not apply, then that person is subject to a mandatory arrest via the proposed trespass AMC.

## POLICIES, PLANS & GOALS SUPPORTED

Having the ELEA in place downtown has been an invaluable tool for the Ashland Police Department. Since its inception in 2012, the ELEA has allowed APD to mitigate chronic negative behavior downtown. This negative behavior peaked in 2017 and has been steadily declining since. Since 2017 there have been 1,063 qualifying violations in the downtown area, leading to the expulsion of 46 individuals.

While the current ELEA ordinance has been an invaluable tool, it is not without its obstacles. The current ordinance requires that individuals exhibit repeated negative behavior in the downtown area, and be convicted on those charges, before the expulsion process can be initiated and make its way through the municipal court. The new ordinance allows officers to recognize chronic negative behavior individuals as the violations are occurring and expel them from the area, with the threat of additional charges if they return. This process allows members of the Ashland Police Department to be much more responsive and problem-solving oriented to chronic negative behavior from individuals.

## BACKGROUND AND ADDITIONAL INFORMATION

Section 10.120.020 allows officers to expel individuals from designated Enhanced Law Enforcement Areas (ELEAs) for offenses committed within those areas. The two primary ELEAs are shown on the proposed maps (Exhibits A and B). Additionally, an officer can expel someone from city-owned or managed property if the officer has probable cause to believe that a crime or violation listed in 10.120.020 occurred on city-owned or managed property. A court can also expel someone from an ELEA in a court order.

As listed in Section 10.120.020, expulsion durations vary. Those variations correlate to the severity of the behavior. For example, someone can be expelled from an ELEA for 30 days for the listed non-criminal violations. In these cases, if someone fails to appear to court for their underlying offense, the offender is subject to an additional 30-day expulsion. For misdemeanors, an offender is subject to a 90-day expulsion and 180 days for felonies.

Re-entry into an ELEA without valid exception (10.120.040) constitutes criminal trespass (a B misdemeanor, AMC 10.56.020.D), resulting in a minimum 3-month, maximum 1-year expulsion.

Section 10.120.040 details exceptions allowing re-entry for essential activities (groceries, medical care, employment), travel, or granted variances. In other words, even if someone was expelled, that person is nonetheless permitted to be in an ELEA for one of those listed exceptions or by a court variance.

The ordinance incorporates several due process protections (10.120.030, 10.120.050). Expulsion orders will be issued in writing, outlining the individual's rights, consequences, and appeal process, including variance requests. If this ordinance passes, these procedures will be provided in a user-friendly format to ensure citizens have accurate information on the expulsion and their appeal rights.

**FISCAL IMPACTS**

None

**SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS**

If this ordinance passes, it will also create an ELEA in the south end of town, which has been a request by citizens and council. Not passing this ordinance will keep its existing structure.

*Motion*

*"I move to approve the first reading of Ordinance Number 3251, repealing and replacing AMC Chapter 10.120 – Persistent Violations with AMC Chapter 10.120 Civil Expulsions."*

**REFERENCES & ATTACHMENTS**

1. ORD 3251 Repealing Replacing AMC 10.120 with AMC 10.120 Civil Expulsions
2. EAST CAP
3. West CAP

# Ashland Police Department City of Ashland Legal Department Enhanced LEA

November 19, 2024

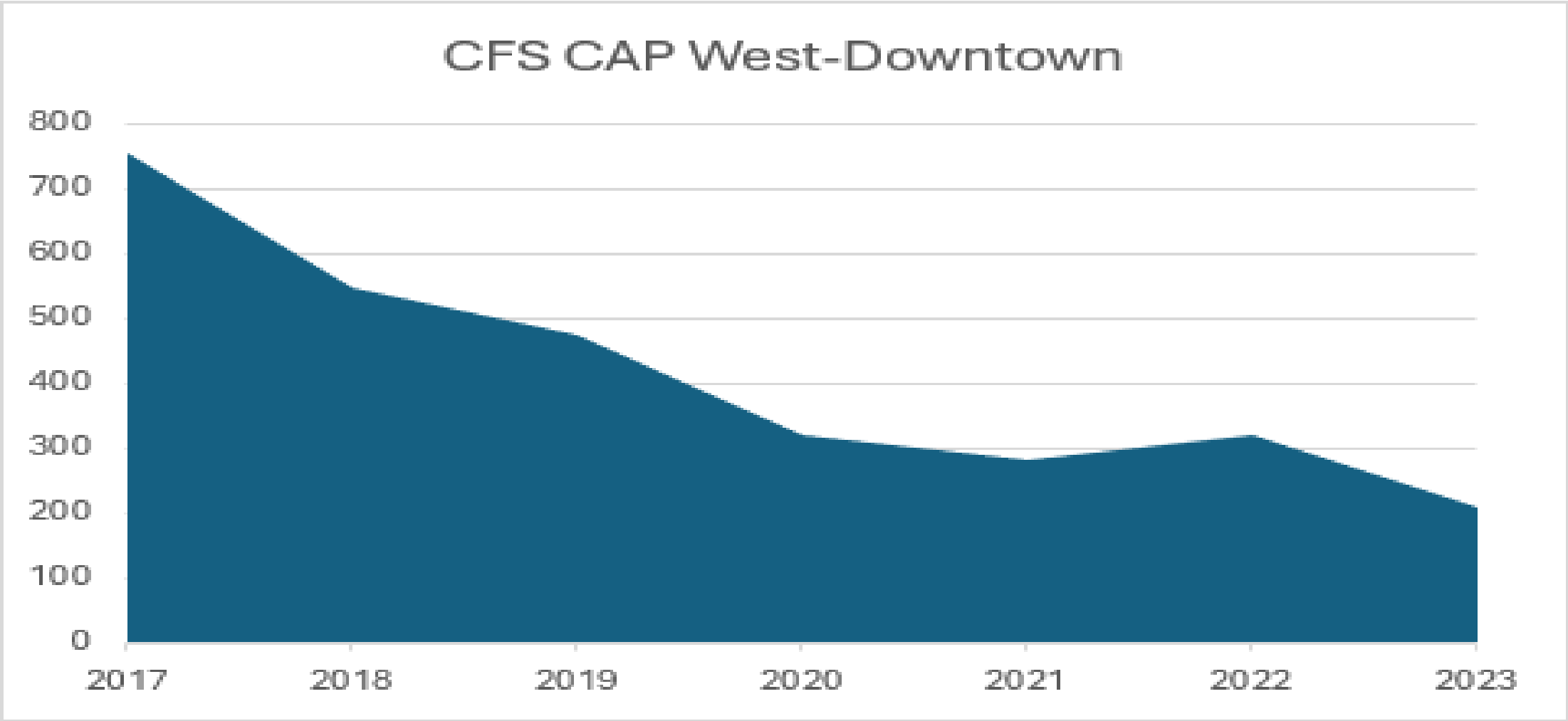
# ELEA in place since 2012 to address chronic negative behavior

Muni court crim. convictions
scattering rubbish
Unnecessary noise
Drinking in public
Open Container
Smoking MJ in public
Dogs control and license
Camping-NOT included

Big Hole in the original (current) law-doesn’t include Circuit Court matters

# CAP (West) Qualifying Convictions/Exp

- 2023 105 violations led to nine expulsions
- 2022 79 violations led to one expulsion
- 2021 56 violations led to three expulsions
- 2020 109 violations led to four expulsions
- 2019 140violations led to eight expulsions
- 2018 215 violations led to six expulsions
- 2017 359 violations led to 15 expulsions


CFS CAP West-Downtown
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2017
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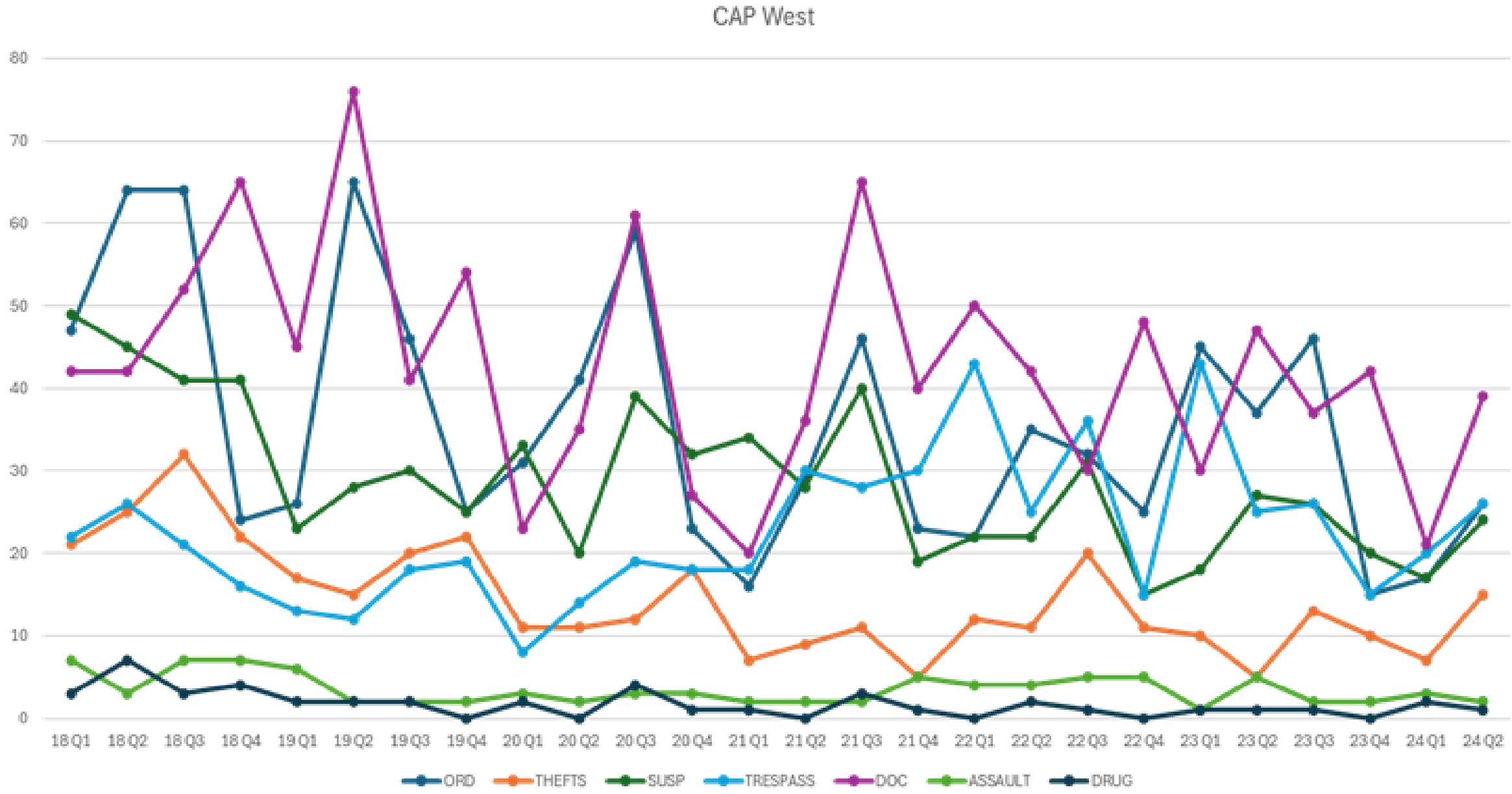
2020
2021
2022
2023


CAP West
80
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18Q1
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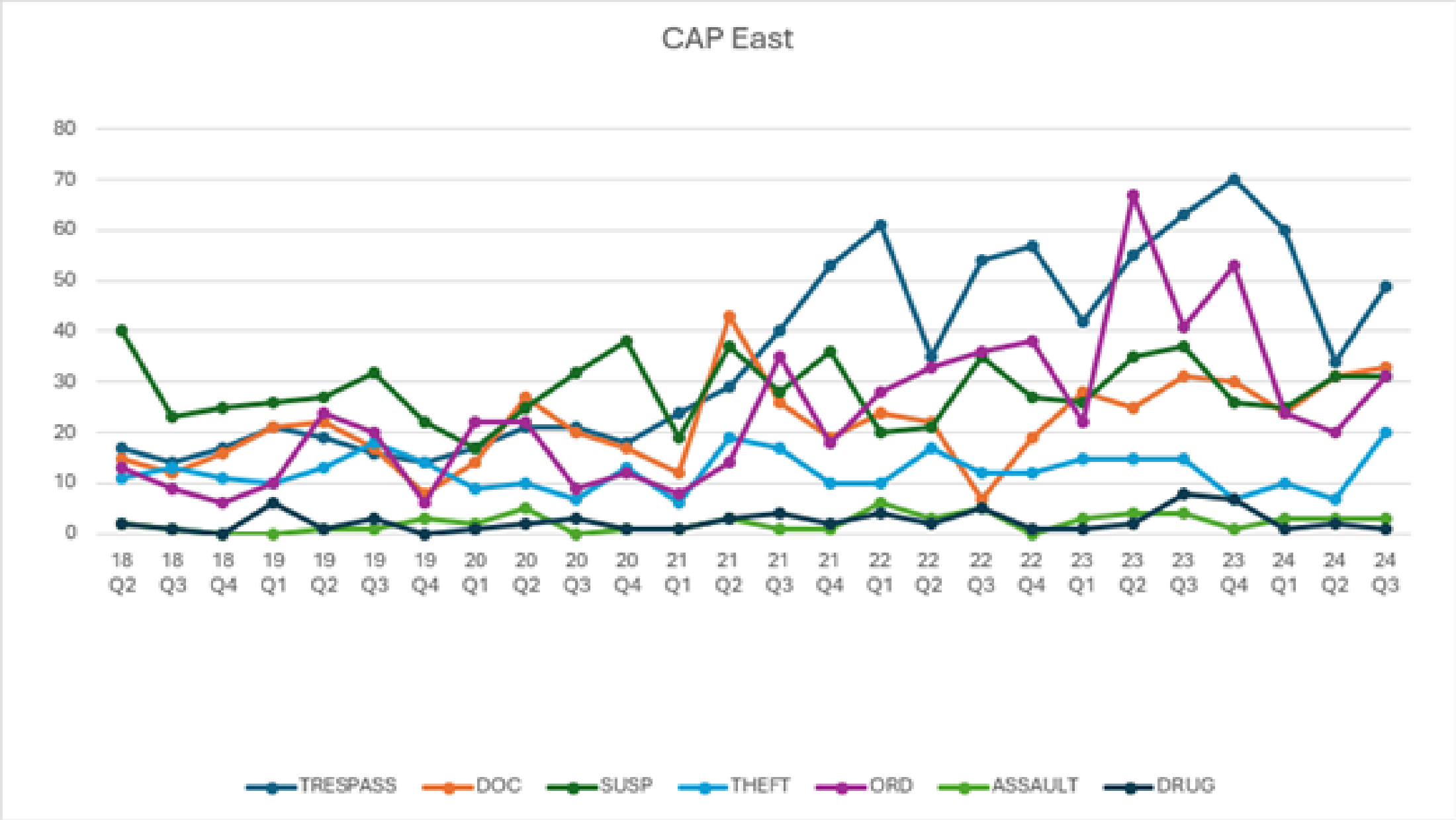
DOC
ASSAULT
DRUG


CAP East
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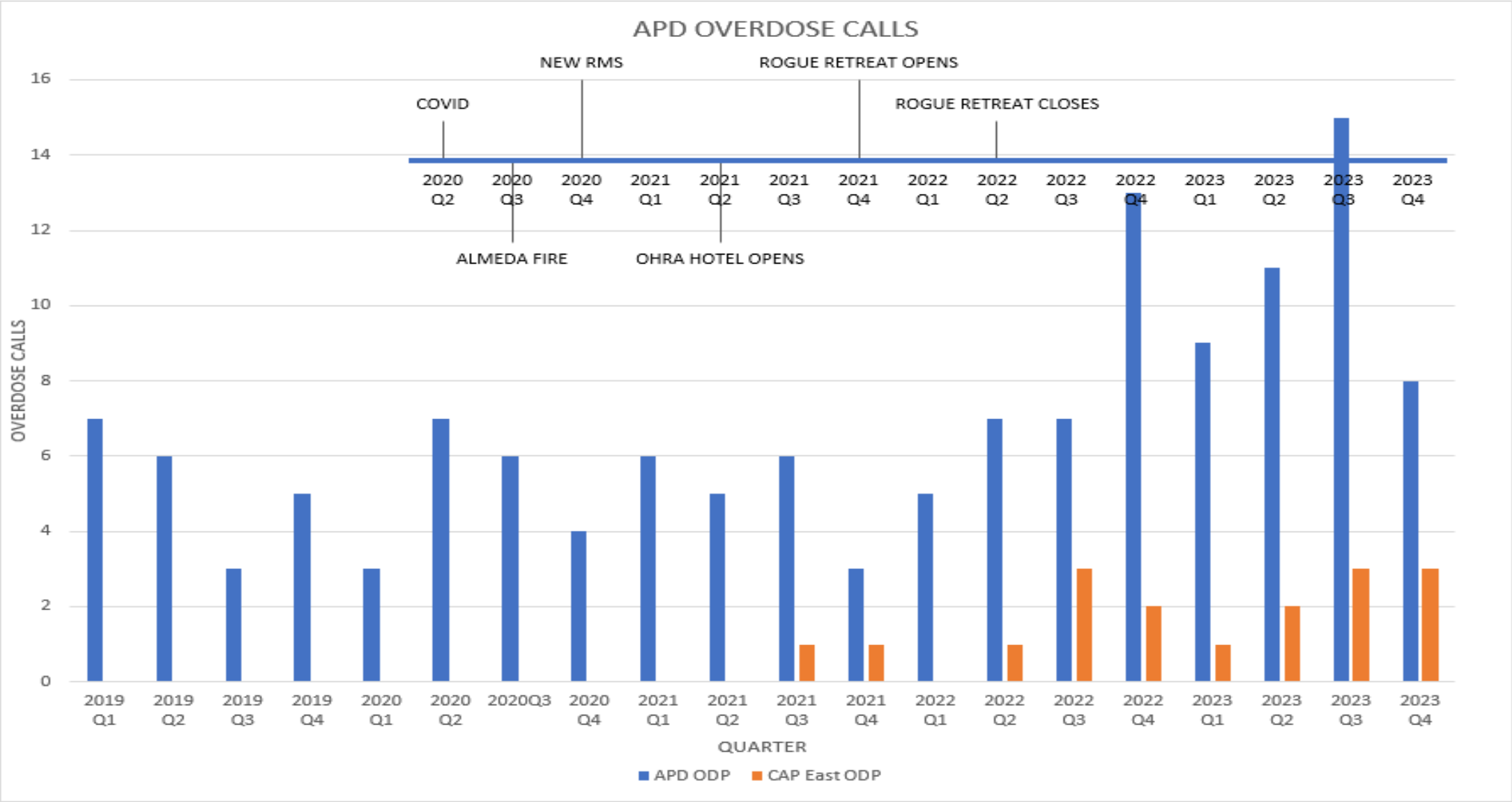
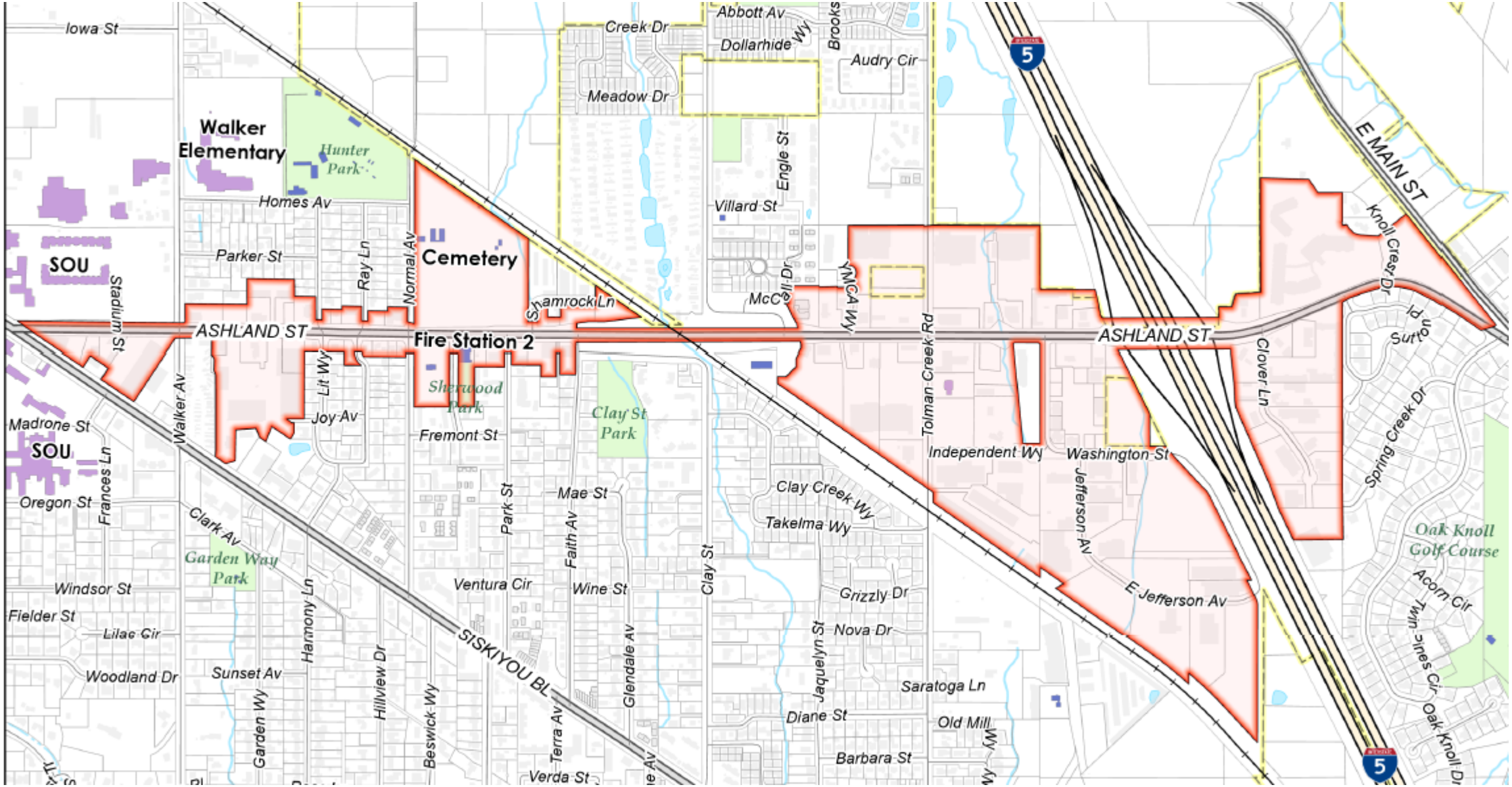

APD OVERDOSE CALLS
NEW RMS
ROGUE RETREAT OPENS
COVID
ROGUE RETREAT CLOSES
ALMEDA FIRE
OHRA HOTEL OPENS
OVERDOSE CALLS
0
2
4
6
8
10
12
14
16
2019 Q1
2019 Q2
2019 Q3
2019 Q4
2020 Q1
2020 Q2
2020Q3
2020 Q4
2021 Q1
2021 Q2
2021 Q3
2021 Q4
2022 Q1
2022 Q2
2022 Q3
2022 Q4
2023 Q1
2023 Q2
2023 Q3
2023 Q4
QUARTER
APD ODP
CAP East ODP

# Since January 1st

- In proposed CAP East:
  - 19 individuals have received 3 or more charges
  - Highest offender has received 133, then 9, 7,6


Iowa St
Walker Elementary
Hunter Park
Homes Av
SOU
Parker St
Stadium St
Ray Ln
Normal Av
Cemetery
Shamrock Ln
ASHLAND ST
Fire Station 2
Walker Av
Lit Wy
Joy Av
Sherwood Park
Fremont St
Clay St Park
Madrone St
SOU
Oregon St
Frances Ln
Clark Av
Garden Way Park
Windsor St
Fielder St
Lilac Cir
Woodland Dr
Sunset Av
Harmony Ln
Hillview Dr
Garden Wy
Beswick Wy
Ventura Cir
Park St
Mae St
Faith Av
Wine St
Terra Av
Verda St
Glendale Av
SISKIYOU BL
Clay St
Clay Creek Wy
Takelma Wy
Grizzly Dr
Nova Dr
Jaquelyn St
Saratoga Ln
Diane St
Old Mill Wy
Barbara St
Creek Dr
Meadow Dr
Abbott Av
Dollarhide Wy
Brooks
Audry Cir
Villard St
Engle St
McCall Dr
YMCA Wy
Tolman Creek Rd
Independent Wy
Washington St
Jefferson Av
E Jefferson Av
ASHLAND ST
Clover Ln
E MAIN ST
Knoll Crest Dr
Sutton Pl
Spring Creek Dr
Oak Knoll Golf Course
Acorn Cir
Twin Sails Cir
Oak Knoll Dr
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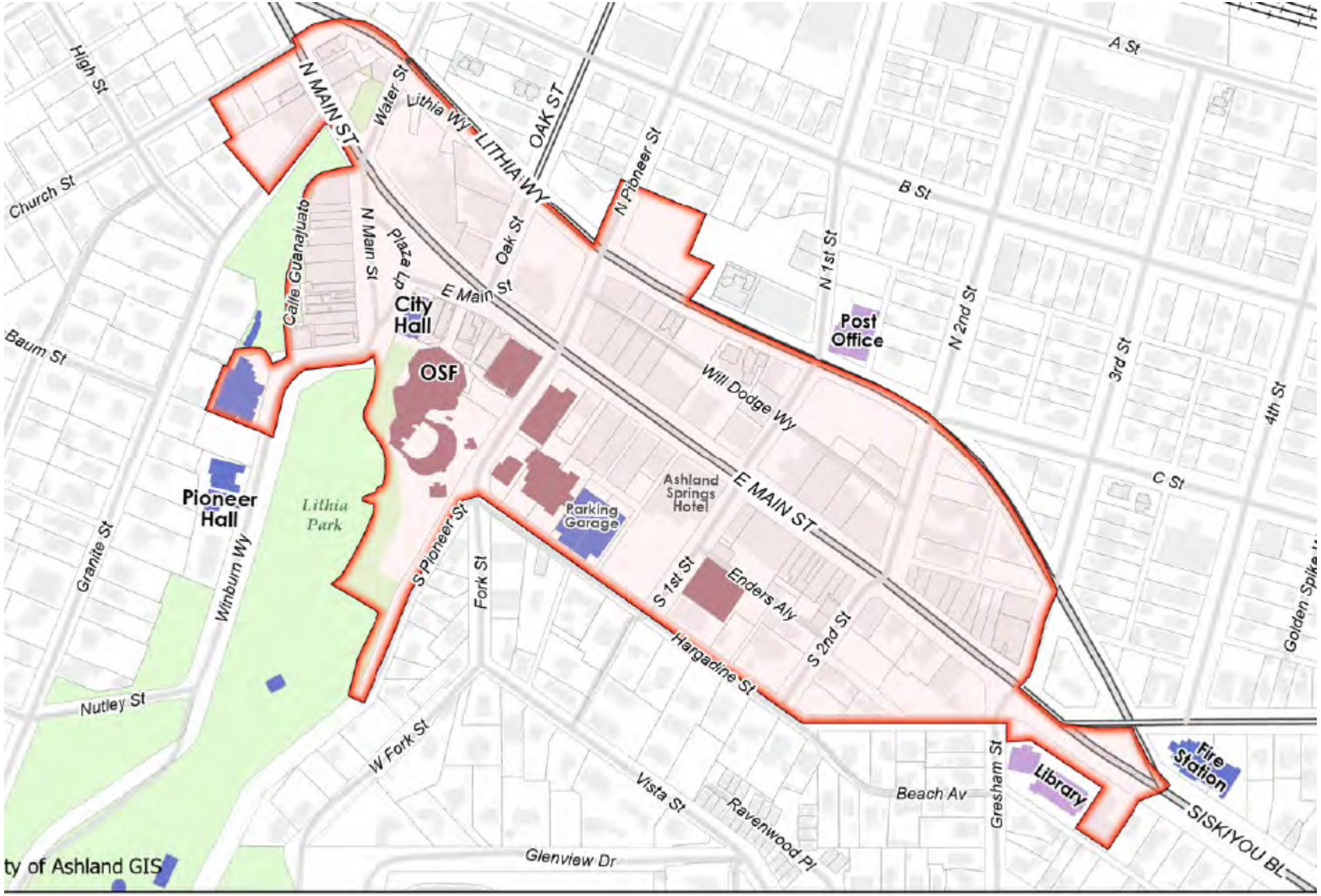
5


High St
N MAIN ST
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A St
B St
Church St
Calle Guanajuato
N Main St
Plaza Lp
Oak St
E Main St
City Hall
N 1st St
Post Office
N 2nd St
3rd St
4th St
Baum St
OSF
Will Dodge Wy
E MAIN ST
C St
Pioneer Hall
Lithia Park
Ashland Springs Hotel
Parking Garage
S Pioneer St
Fork St
Granite St
Winburn Wy
S 1st St
Enders Aly
S 2nd St
Hargadine St
Golden Spike
Nutley St
W Fork St
Vista St
Ravenwood Pl
Beach Av
Gresham St
Library
Fire Station
SISKIYOU BL
Glenview Dr
ty of Ashland GIS

# Council Business Meeting

**Date**: April 15, 2025

| | |
|---|---|
| **Agenda Item** | Water Cost of Service Study and Rate Study Final Draft Update |
| **From** | Scott Fleury, Director |
| **Contact** | scott.fleury@ashland.or.us |

## SUMMARY

Before Council is an update to the presentation provided at the March 18th, 2025 Business Meeting on the Water Cost of Service and Rate Analysis update prepared by HDR Engineering. The Council requested staff perform analysis on various permutations of the rate study alternatives presented in the draft report using alternative number two as the baseline for variations.

## POLICIES, PLANS & GOALS SUPPORTED

VISION STATEMENTS for Success:

- *Ashland is a resilient, sustainable community that maintains the distinctive quality of place for which it is known*
- *We will continue to be a unique and caring city that stresses environmental conservation, fosters artistic expression, and is open to new ideas and innovation*
- *We will plan and direct our efforts to fulfill this Vision for the long term with a constant view toward being an open, welcoming community for all with a positive economic future*

VALUE STATEMENTS for Success that Support the Vision:
COMMUNITY

- Environmental resilience, including addressing climate change and ecosystem conservation

ORGANIZATION

- Quality infrastructure and facilities through timely maintenance and community investment

## BACKGROUND AND ADDITIONAL INFORMATION

## PREVIOUS COUNCIL ACTION

The City Council previously received a presentation on the draft Cost of Service Study at the December 2nd, 2024 Study Session and the updated version at the March 15, 2025 Business Meeting. At the March meeting, the Council requested staff and HDR analyze various scenarios associated with the tiered rate structure and come back at the April 15th, 2025 Business meeting to present findings. The Council requested two specific things at that meeting with respect to finalizing the draft Cost of Service Study:

1. Add shoulder months to revenue (May and October)
    1. Review volume for April and determine if applicable
2. Add shoulder months and modify tier 1 commodity to increase to no more than 500 CF
3. Modify proposed rate structure to start with smaller increases, utilize more ending fund balance and then ramp up increases to year 5
4. Increase tier differential for upper tiers Highlight various scenario bill impacts

5. Discuss potential other scenarios for analysis as subject matter experts

Due to timing of the contract amendment process and other work obligations for HDR Engineering, staff and HDR will present the actual findings and recommendations during the presentation at the meeting on April 15th.

**FISCAL IMPACTS**

The City contracted with HDR Engineering for $49,814 to perform the Cost of Service and Rate Study. To date $48,934 has been expended towards the contract amount. A contract amendment in the amount of $11,043 was processed in order to do additional analysis requested by Council and cover travel expenses for the presentation.

From the 2021-2023 adopted biennium budget to the proposed 2025 biennium budget, people and material and services costs have increased $1.6 million, which represents almost a 13% increase. Without considering capital expenses and only focusing on the increase in revenue just to cover the people, materials and services cost increase, staff estimates the rate increase to cover the $1.6 million dollar change would be approximately 9% for the proposed biennium.

| | Adopted Budget 2021/2023 | Adopted Budget 2023/2025 | Proposed Budget 2025/2027 |
|---|---|---|---|
| People | $ 4,090,208 | $ 5,037,472 | $ 5,862,136 |
| Materials and Services | $ 8,660,818 | $ 9,181,725 | $ 8,519,568 |
| **Totals** | **$ 12,751,026** | **$ 14,219,197** | **$ 14,381,704** |

The 2025-2027 Biennial Budget proposed rate increases support the overall funds including personnel, operations, capital and debt expenses. The proposed rate increases relate to anticipated revenues to offset expenditures within the enterprise utility. Should the Council not want to move forward with adoption of rate increase to support projected expenses, offsetting reductions in expenditures must be made.

**SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS**

I move to accept the Cost of Service Study utilizing the staff recommendation (to be presented)
I move to amend the Cost of Service Study (insert amendment).

**REFERENCES & ATTACHMENTS**

1. City of Ashland - 2024 Water Rate Study Draft Report (3.18.2025 Copy)

# Draft Report

# City of Ashland

## Water Rate Study

**March 2025**

March 7, 2025

Mr. Scott Fleury
Public Works Director
City of Ashland
51 Winburn Way
Ashland, OR 97520

**Subject: Water Rate Study Draft Report**

Dear Mr. Fleury:

HDR Engineering, Inc. (HDR) is pleased to present the draft report for the water rate study (Study) conducted for the City of Ashland (City). The Study objectives were to provide an independent review of the City's water utility and develop a rate transition plan that will result in cost-based water rates to reflect the operating and capital needs of the City's water utility as identified in the Study. Additionally, the Study reviewed the proportionality of the water rates for the different types of customers (e.g., rate schedules) served by the City. This report outlines the approach, methodology, findings, and conclusions resulting from the rate study process.

This report utilized the City's accounting, budgeting, operating, and historical customer billing records. HDR has relied on this information to develop our analyses that form our findings, conclusions, and recommendations. At the same time, the Study was developed utilizing generally accepted water rate setting principles as outlined in industry standard rate setting manuals such as the American Water Works Association (AWWA) M1 Manual Principles of Water Rates, Fees, and Charges. The conclusions and recommendations contained within this report are intended to provide the City with cost-based and proportional water rates.

We appreciate the assistance provided by City staff, management, and Council in the development of the Study.

Sincerely yours,
HDR Engineering, Inc.

Josiah Close

Josiah Close
Utility Rates Project Manager

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**Technical Appendix**

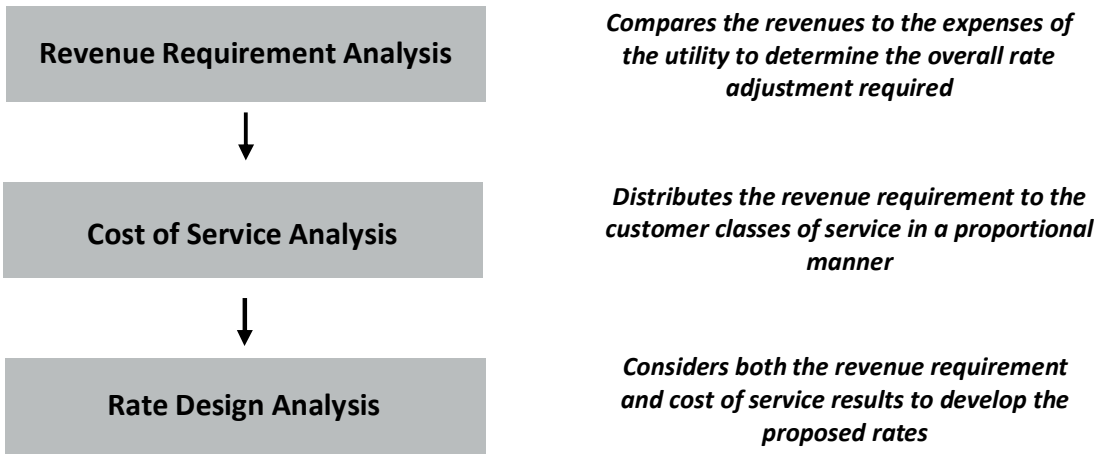
# Executive Summary

HDR Engineering, Inc. was retained by the City of Ashland to perform a water rate study. The development of the Study examines the overall adequacy and proportionality of the existing water rates, provides the cost basis for needed rate revenue adjustments, and seeks to sufficiently fund the operating and capital needs of the City's water utility. This report describes the methodology, findings, and conclusions of the water rate study.

## ES-1 Overview of the Rate Study Process

A comprehensive water rate study uses three interrelated analyses to address the adequacy and proportionality of the City's water rates. These three analyses are a revenue requirement analysis, a cost of service analysis, and a rate design analysis. These three analyses are illustrated below in Figure ES - 1.

**Figure ES – 1**
**Overview of the Comprehensive Rate Study Analysis**




For the City's Study, HDR conducted each of these analyses for the water system. The result of each task of the rate study was used as the basis for establishing cost-based and proportional water rates for the City's customers.

## ES-2 Key Rate Study Results

The water utility was evaluated on a stand-alone basis, that is, with no funding provided from outside sources or other City enterprise funds. By reviewing the water utility on a stand-alone basis, the City can determine the actual costs incurred to provide water service to its customers.

Based on the technical analysis undertaken as part of the Study, the following findings, conclusions, and recommendations were noted.

- A revenue requirement analysis was developed - on a stand-alone basis - for FY 2025 to FY 2033
- The starting point for the revenue requirement analysis was the adopted FY 2025 water budget and capital improvement plan
- A rate transition plan was developed to adequately fund the operating and capital needs of the water utility as well as strengthen key financial metrics
- A cost of service analysis was developed for the water utility to determine the appropriate level of revenue to collect from each customer class of service (i.e., Residential, Multi-Family, Residential Irrigation, Commercial, Institutional, Commercial Irrigation, Institutional Irrigation)
- Minor cost of service differences were noted in the water cost of service analysis results
- Proposed water rates were developed for a 5-year period (FY 2026 – FY 2030) to provide the City Council with a projection of the water rates necessary to meet future operating and capital needs
- By FY 2030, the City should update the rate study to review the need for future rate adjustments to reflect system and customer characteristics and assumptions at that time

## ES-3 Water Revenue Requirement Analysis

In general terms, the water rate study evaluates the overall rate revenue adequacy and proportionality of the existing water rates. As mentioned above, the City's water utility was evaluated on a stand-alone basis. That is, no funding sources other than those generated by the water utility - such as water sales and other water-related fees and revenues - were used to fund water utility expenses.

The starting point of the revenue requirement analysis was the FY 2025 adopted water budget. HDR developed a projection of revenues and expenses for future years based on estimated escalation (inflationary) factors. The Study was projected for an eight-year period (FY 2026 through FY 2033) to review future rate adjustments needs based on the water utility's operating and capital expenses. For establishing the proposed water rates, the focus was on the next five-year period (FY 2026 through FY 2030).

The revenue requirement analysis compares the utility's annual operating and capital expenses to the total water rate revenues to determine if a balance or deficiency exists. Subsequently, if a deficiency exists, the analysis will calculate the necessary rate adjustment required to fund the water utility. The rate transition plan developed for the water utility was based on meeting various financial targets, which should be maintained as part of being a financially healthy utility. Provided below in Table ES – 1 is a summary of the water revenue requirement analysis for the City.

| Table ES – 1<br>Summary of the Water Revenue Requirement ($000s) | | | | | | |
|---|---|---|---|---|---|---|
| | **FY 2025** | **FY 2026** | **FY 2027** | **FY 2028** | **FY 2029** | **FY 2030** |
| **Revenues** | | | | | | |
| Rate Revenues | $8,644 | $8,687 | $8,730 | $8,774 | $8,818 | $8,862 |
| Other Revenues | 419 | 381 | 342 | 291 | 246 | 224 |
| **Total Revenues** | **$9,063** | **$9,068** | **$9,072** | **$9,065** | **$9,064** | **$9,086** |
| **Expenses** | | | | | | |
| Total O&M Expenses | $6,732 | $7,106 | $7,456 | $7,784 | $8,117 | $8,438 |
| Taxes & Transfers | 770 | 747 | 752 | 757 | 763 | 768 |
| Rate Funded Capital | 825 | 2,000 | 2,400 | 1,625 | 2,300 | 3,550 |
| Net Debt Service | 726 | 287 | 774 | 2,641 | 3,241 | 3,562 |
| Reserve Funding | 10 | 15 | 20 | 12 | 28 | 18 |
| **Total Revenue Requirement** | **$9,063** | **$10,154** | **$11,402** | **$12,819** | **$14,449** | **$16,336** |
| Bal. / (Def.) of Funds | $0 | ($1,173) | ($2,516) | ($4,055) | ($5,816) | ($7,830) |
| Balance as % of Rev from Rates | 0.0% | 13.5% | 28.8% | 46.2% | 66.0% | 88.4% |
| **Proposed Rate Adjustment** | **0.0%** | **13.5%** | **13.5%** | **13.5%** | **13.5%** | **13.5%** |
| Add'l Revenue with Rate Adj. | $0 | $1,173 | $2,516 | $4,055 | $5,816 | $7,830 |
| Bal. / (Def.) After Rate Adj. | 0 | 0 | 0 | 0 | 0 | 0 |

Based on the water revenue requirement analysis shown in Table ES – 1, HDR recommends the City increase the overall revenue levels of the water utility 13.5% annually in FY 2026 through FY 2030. The deficit in FY 2026, prior to proposed rate adjustments, is $1.2 million, which increases to $7.8 million by FY 2030. The rate revenue adjustments are necessary to fund capital improvement projects, existing and future debt service payments, and maintain the City's prudent financial policies. In addition, the proposed rate adjustments will allow the utility to remain financially healthy and provide the capability for the City to fund future water capital improvement projects. A more detailed discussion of the revenue requirement is provided in Section 2 of this report.

## ES-4 Water Cost of Service Analysis

The second analytical step of the water rate study is the cost of service analysis. A cost of service analysis determines the proportional distribution of the revenue requirement to the customer classes of service, or rate schedules. for the City's Study, the customer classes of service reviewed were Residential, Multi-Family, Residential Irrigation, Commercial, Institutional, Commercial Irrigation, and Institutional Irrigation. These customer classes of service were based on the City's current customer data and information. In discussion with the City and due to rate schedule similarities, for cost of service analysis purposes, the customer classes of service were grouped into the following customer classes: Residential/Multi-Family/Residential Irrigation/Commercial, Institutional, and Commercial Irrigation/Institutional Irrigation.

The objective of the cost of service analysis is to determine the proportional manner in which to collect the previously developed revenue requirement. A summary of the water cost of service results is provided in Table ES – 2.

**Table ES – 2**
**Summary of the FY 2026 Water Cost of Service Analysis ($000s)**

| Class of Service | Present Rate Revenues | Distributed Costs | $ Difference | % Difference |
|---|---|---|---|---|
| Res / MF / Res Irr/Com | $7,295 | $8,288 | ($1,072) | 14.7% |
| Institutional | 341 | 388 | (51) | 14.8% |
| Com Irr/ Inst Irr | 1,050 | 1,097 | (50) | 4.8% |
| **Total** | **$8,687** | **$9,773** | **($1,173)** | **13.5%** |

The results of the water cost of service analysis, as provided in Table ES – 2 above, show minor cost differences between serving the customer classes of service. A general guideline is that if a customer group is within +/- 5% of the overall system revenue adjustment, then the customer class is paying its proportional share of costs. This guideline is used over time as customer usage characteristics change, as well as City costs, which can result in changes in the cost distribution.

Given the above framework for reviewing the results, it appears that the water customer classes of service are reasonably paying their share of costs required to provide service. Based on the results of the cost of service analysis, it is recommended that the City continue to use specific rate schedules for each customer class (Residential, Multi-Family, Residential Irrigation, Commercial, Institutional, Commercial Irrigation, Institutional Irrigation) to reflect the customer characteristics and costs associated with providing service to each customer class. A more detailed discussion on the development and results of the cost of service analysis is provided in Section 3 of this report.

## ES-5 Water Rate Design Analysis

The final component of a rate study is the development of water rates which reflect the overall revenue needs, as developed in the revenue requirement analysis, and the results of the cost of service analysis.

The City currently has a rate schedule for each of the customer classes of service (types). The current rate structures include a fixed customer charge and a fixed meter charge that varies by meter size. In addition to these fixed charges, each customer class has a variable consumption charge that differs by customer class of service. The variable consumption charges are on a tiered basis for all customers with the exception of commercial and institutional irrigation, which have seasonal uniform rates, and institutional, which has an annual uniform rate.

In discussion with City staff, it was determined that the current rate structures would be maintained but adjusted slightly to more closely reflect the goals and objectives of the City. While the fixed customer charge is being maintained, the fixed meter charge by meter size was transitioned for all customer classes over the five-year rate setting period to reflect the AWWA safe operating capacity ratios for each corresponding meter size. For the variable consumption charges, the tiered structures for all customers, regardless of customer class, were maintained with regards to the size and number of tiers. The change that was included was utilizing the peaking factors from the City's customer consumption data to develop tier differentials that better reflect the City's current customer usage characteristics. After the first year, the fixed customer and variable consumption charges are adjusted equally by the proposed rate adjustment in each year. The fixed meter charge is to be transitioned to the AWWA equivalent factors by year 5.

Table ES – 3 summarizes the present and proposed fixed charge rates for the City's water customers.

**Table ES – 3**
**Summary of the Present and Proposed Fixed Water Rates**

| | Present Rate | Proposed FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Customer Charge** | ***$ / Acct./ Mo.*** | | | | | |
| All Customers | $13.33 | $16.50 | $19.25 | $22.00 | $25.10 | $29.00 |
| **Meter Charge** | ***$ / Acct./ Mo.*** | | | | | |
| 3/4" | $15.62 | $15.95 | $18.10 | $20.54 | $23.31 | $26.46 |
| 1" | 16.29 | 18.63 | 23.42 | 29.15 | 36.00 | 44.19 |
| 1.5" | 74.52 | 71.50 | 75.92 | 80.24 | 84.34 | 88.11 |
| 2" | 118.41 | 113.73 | 120.92 | 127.97 | 134.73 | 141.03 |
| 3" | 237.45 | 225.87 | 237.49 | 248.14 | 257.35 | 264.60 |
| 4" | 376.59 | 360.81 | 382.52 | 403.52 | 423.26 | 441.09 |
| 6" | 741.01 | 711.65 | 756.51 | 800.52 | 842.70 | 881.91 |
| 8" | 1,174.75 | 1,129.78 | 1,202.87 | 1,275.15 | 1,345.12 | 1,411.11 |

Table ES – 4 details the consumption charges for each of the customer classes of service.

## Table ES – 4
## Summary of the Present and Proposed Water Consumption Rates

| | Present Rate | Proposed FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Residential and Multi-Family** | | | | | | |
| **October – May** | ***$ /cf.*** | | | | | |
| 0 - 300 | $0.0280 | $0.0263 | $0.0299 | $0.0339 | $0.0385 | $0.0437 |
| 301 - 1,000 | 0.0348 | 0.0425 | 0.0482 | 0.0547 | 0.0621 | 0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| Over 2,500 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| **June – September** | ***$ /cf.*** | | | | | |
| 0 - 300 | $0.0280 | $0.0263 | $0.0299 | $0.0339 | $0.0385 | $0.0437 |
| 301 - 1,000 | 0.0348 | 0.0425 | 0.0482 | 0.0547 | 0.0621 | 0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| 2,501 - 3,600 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| Over 3,600 | 0.0784 | 0.0957 | 0.1087 | 0.1234 | 0.1401 | 0.1590 |
| **Residential Irrigation** | | | | | | |
| **October – May** | ***$ /cf.*** | | | | | |
| 0 - 1,000 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| Over 2,500 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| **June – September** | ***$ /cf.*** | | | | | |
| 0 - 1,000 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| 2,501 - 3,600 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| Over 3,600 | 0.0784 | 0.0957 | 0.1087 | 0.1234 | 0.1401 | 0.1590 |
| **Commercial** | | | | | | |
| **Less than 2" Meter** | ***$ /cf.*** | | | | | |
| 0 - 2,500 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| Over 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| **2" Meter or Larger** | | | | | | |
| 0 - 15,000 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| Over 15,000 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| **Institutional** | ***$ /cf.*** | | | | | |
| All Consumption | $0.0334 | $0.0416 | $0.0472 | $0.0536 | $0.0608 | $0.0690 |
| **Commercial and Institutional Irrigation** | | | | | | |
| **October – May** | ***$ /cf.*** | | | | | |
| Non-Peak Consumption | $0.0376 | $0.0367 | $0.0417 | $0.0473 | $0.0537 | $0.0609 |
| **June – September** | ***$ /cf.*** | | | | | |
| Peak Consumption | $0.0510 | $0.0615 | $0.0698 | $0.0792 | $0.0899 | $0.1020 |

Section 4 of this report provides the development of the proposed rates.

## ES-6 Summary of the Water Rate Study

It is recommended that the City's water rates be increased annually from FY 2026 through FY 2030 as outlined in this report. The proposed rate adjustments are necessary to maintain prudent financial metrics, allow the City to complete planned capital improvement projects, and adequately fund annual O&M expenses for the water utility. The proposed water rates are cost-based and reflect the customer impacts on the City's water system.

# 1 Rate Setting Principles

The objective of the Study is to develop proportional and cost-based water rates. This is accomplished by reviewing and analyzing the City's water operating and capital costs and developing a projection of the overall revenue requirement. Next, the revenue requirement is proportionally distributed to the City's water utility customer classes of service. The findings and conclusions from these two analyses are then used to develop the City's proposed water rates, which are reflective of how the City incurs costs to provide water service to the City's customers. The results of the Study provide proportional water rates that reflect the water utility's specific costs (i.e., cost-based rates).

The City owns and operates the water system in Ashland. The determination of the total costs associated with providing service to the City's customers has been developed based on the City's accounting, operating, and customer billing records along with other City specific information.

## 1.1 Organization of the Study

This report is organized in a sequential manner that first provides an overview of utility rate setting principles, followed by sections that detail the specific technical and analytical steps used to develop the City's proposed water rates. The following sections comprise the Study report:

- **Section 2** – Revenue Requirement Analysis
- **Section 3** – Cost of Service Analysis
- **Section 4** – Rate Design Analysis

A Technical Appendix is attached at the end of this report, which details the technical analyses that were undertaken in the preparation of the City's Study.

## 1.2 Study Goals and Objectives

The City had several key objectives in developing the Study. These key goals and objectives provide a framework for the technical analysis and policy decisions that are a part of the Study. The City's key goals and objectives for the Study were as follows:

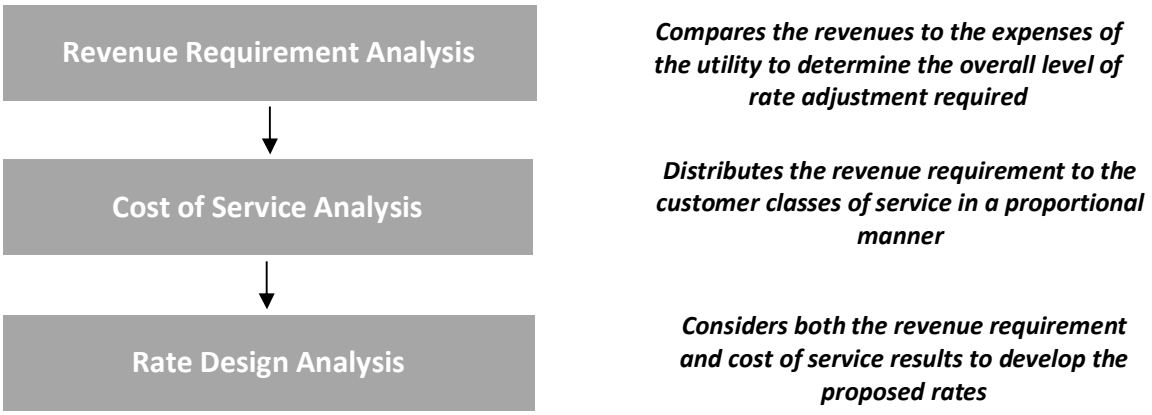
- Develop the water rate study in a manner consistent with the principles and methodologies established by the American Water Works Association (AWWA), M1 Manual, Principles of Water Rates, Fees, and Charges
- In financial planning and establishing the City's proposed water rates, review and utilize industry practices, while recognizing and acknowledging the specific and unique characteristics of the City's system and customers
- Utilize generally accepted rate making methodologies to review the City's costs to determine the adequacy and proportionality of the water rates
- Meet the City's financial planning criteria as it relates to legally required debt service coverage (DSC) ratios, adequate funding of capital infrastructure, and maintenance of adequate reserve levels

- Develop a final proposed water rate transition plan which adequately supports the funding requirements, while balancing the impacts to customer bills

## 1.3 Overview of the Rate Study Process

The City's water rates must be set at a level where operating and capital expenses are met with the revenues received from customers. This is an important point, as failure to achieve this objective may lead to insufficient funds to maintain system integrity. To evaluate the adequacy and proportionality of a utility's existing rates, a water rate study is performed. A water rate study consists of three interrelated analyses. Figure 1 – 1 below provides an overview of these analyses.

**Figure 1 – 1**
**Overview of the Water Rate Study**




The above framework was utilized for reviewing and evaluating the City's water rates.

## 1.4 Determining the Revenue Requirement

Many public utilities typically use the cash basis [1] approach, or methodology, for establishing their revenue requirement and setting rates. This approach conforms to most public utility budgetary requirements and the calculation is easy to understand. A public utility totals its cash expenditures for a period to determine the required revenues. The revenue requirement for a

[1] Cash basis as used in the context of rate setting is not the same as the terminology used for accounting purposes and recognition of revenues and expenses. As used for rate setting, cash basis simply refers to the specific cost components to be included within the revenue requirement analysis.

public utility is usually comprised of the following cost components or expenses:

- **Total Operating Expenses:** This includes a utility's operation and maintenance (O&M) expenses, plus applicable taxes or transfer payments. Operation and maintenance expenses include the materials, electricity, labor, supplies, etc., needed to keep the utility functioning.
- **Total Capital Expenses:** Capital expenses are calculated by adding annual debt service payments (principal and interest) to capital improvements financed with rate revenues. In lieu of including capital improvements financed with rate revenues, a utility sometimes includes annual depreciation expense to stabilize the annual revenue requirement.

Under the cash basis approach, the sum of the total operating expenses plus the total capital expenses equals the utility's revenue requirement during any selected time period (historical or projected).

Note that the two portions of the capital expense component (debt service and capital improvements funded from rate revenues) are necessary under the cash basis approach because utilities generally cannot finance the total annual capital facilities with long-term debt. At the same time, it is often difficult to pay for the total annual capital expenditures on a "pay-as-you-go" basis given that some major capital projects may have significant rate impacts on the utility, even when financed with long-term debt. Many utilities have found that a combination of "pay-as-you-go" funding and long-term debt financing will often lead to the minimization of rate increases over time.

As noted, public utilities typically use the cash basis methodology or approach to establish their revenue requirement. An exception may occur if a public utility provides service to a wholesale or large contract customer. In this situation, a public utility could use the utility basis approach (see Table 1 – 1) to earn a "fair" rate of return on the investment needed to serve the wholesale or large contract customer.

**Table 1 – 1**
**Cash versus Utility Basis Comparison**

| | Cash Basis | | Utility Basis (Accrual) |
|---|---|---|---|
| + | O&M Expenses | + | O&M Expenses |
| + | Taxes/Transfer Payments | + | Taxes/Transfer Payments |
| + | Rate Funded Capital Improv. (≥ Depreciation Expense) | + | Depreciation Expense |
| + | Debt Service (Principal + Interest) | + | Return on Investment |
| = | **Total Revenue Requirement** | = | **Total Revenue Requirement** |

## 1.5 Analyzing Cost of Service

After the total revenue requirement is determined, it is proportionally distributed to the users of the service. The allocation and distribution process, as analyzed through a cost of service analysis, reflects the cost relationships for producing and delivering water services. A cost of service analysis requires three analytical steps:

1. Costs are ***functionalized,*** or grouped, into the various cost categories related to providing service (e.g., water supply, treatment, distribution, pumping). This step is largely accomplished by the utility's accounting system.
2. The functionalized costs are then ***allocated*** to specific cost component(s). Allocation refers to the arrangement of the functionalized data into the appropriate cost component(s). For example, a water utility's costs are typically allocated as commodity (average day), capacity (peak day), customer, or fire-protection-related costs.
3. Once the total costs are allocated to the appropriate cost component(s), they are proportionally ***distributed*** to each of the customer classes of service or rate schedule components (i.e., fixed, variable). The proportional distribution is based on each customer class's relative contribution to the cost component (i.e., benefits received from, and burdens placed on the system and its resources). For example, customer-related costs are proportionally distributed to each class of service based on the total number of customers in that class of service, relative to all other customer classes of service. Once the total costs (i.e., revenue requirement) are proportionally distributed, the level or amount of revenues required from each customer class of service to achieve cost-based rates can be determined.

The City's cost of service analysis was developed based on generally accepted water cost of service methodologies and approaches, while at the same time, the analysis tailored to reflect the City's unique customer and system characteristics.

## 1.6 Designing Water Rates

Water rates that meet the utility's cost-based and proportional objectives are designed based on the findings and conclusions from the revenue requirement and cost of service analyses. Using the cost information from these two analyses provides rates that are strictly cost-based and proportional. The average unit costs (i.e., cost-based rates) from the cost of service analysis do not consider, or take into account, other non-cost based goals and objectives (e.g., conservation, economic development, ability to pay, revenue stability). In designing rates, many utilities consider or incorporate these rate design objectives into the final rate designs. However, utilities need to take into consideration each customer class's proportional share of costs distributed through the cost of service analysis to maintain proportional and cost-based rates.

## 1.7 Economic Theory and Rate Setting

One of the major justifications for a rate study is founded in economic theory. Economic theory suggests that the price of a commodity must roughly equal its cost if equity among customers is to be maintained. This statement's implications on utility rate designs are significant. For

example, a water utility usually incurs capacity-related costs to meet summer outdoor or non-domestic watering needs. It is presumed, then, that the customers who create excessive peak demands on the system - and create the need for upsizing of the water system infrastructure - should pay their proportional share of the costs related to the over-sizing of facilities to meet peak use requirements. When costing and pricing techniques are refined, consumers have a more accurate understanding of what the commodity costs to produce and deliver. This price-equals-cost concept provides the basis for the subsequent analysis and comments.

# 2 Revenue Requirement Analysis

This section describes the development of the revenue requirement analysis for the City's water utility. The revenue requirement analysis is the first analytical step in the comprehensive rate study process. This analysis determines the adequacy of the overall water rates at current rate levels. From this analysis, a determination can be made as to the overall level of rate adjustment needed to provide adequate and prudent funding for both operating and capital needs.

## 2.1 Determining the Water Utility Revenue Requirement

In developing the water rate study, it was assumed that the City's water utility must financially "stand-alone" and be properly funded. As a result, the revenue requirement as developed herein assumes the full and proper funding needed to operate and maintain the water utility on a financially sound and prudent basis. This includes maintaining adequate reserve levels, prudently funding annual renewal and replacement needs (rate funded capital), and meeting other industry standard financial metrics (e.g., debt service coverage). Provided in the following sections is a more detailed discussion of the development of the revenue requirement analysis for the City's water utility.

## 2.2 Establishing a Time Frame and Approach

The first step in calculating the revenue requirement for the water utility was to establish a time frame for the revenue requirement analysis. For the Study, the revenue requirement was developed for the FY 2025 budget and a projected time period of FY 2026 through FY 2033. For rate setting purposes, the focus was on the five-year period of FY 2026 – FY 2030. Reviewing a multi-year time period is recommended to identify major expenses – either operating or capital – that may be on the horizon and to be able to see trends that may be happening. By anticipating future financial requirements, the City can begin planning for these changes sooner, transition rate levels, and minimize short-term rate impacts as well as long-term rate levels.

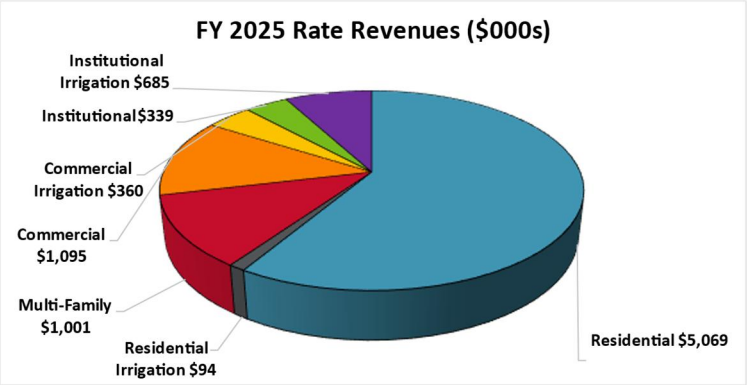
The second step in determining the revenue requirement was to decide on the basis of accumulating costs. For the City's revenue requirement, a cash basis approach was utilized. This approach is the typical methodology used by municipal utilities to set their revenue requirement. The revenue requirement developed for the City was customized to follow the City's system of accounts (budget documents), which contained the four basic cost components of the cash basis methodology.

The primary financial inputs in this process were the City's historical billing records, adopted operating budget, and capital improvement plan. Presented below is a detailed discussion of the steps and key assumptions contained in the development of the projections of the City's revenues and expenses.

## 2.3 Projection of Revenues

The City's water utility receives revenue from two primary sources: water rates and miscellaneous revenue. Rate revenues are based on the current rate structure and are collected on a monthly basis from the City's water customers. Miscellaneous revenue includes items such as interest income and other miscellaneous revenues.

The first step in developing the revenue requirement was to develop a projection of rate revenues, at present rate levels. This process involved developing projected consumption/billing units for each customer group based on historical billing records. The billing units were then multiplied by the applicable current rates. This method of independently calculating revenues results in the projected revenues used within the analysis tying to the projected billing units used in the development of the cost of service and rate design analyses. The consumption was based on historical consumption records of the City's customers.




There are currently seven customer classes: Residential, Multi Family, Residential Irrigation, Commercial, Institutional, Commercial Irrigation, and Institutional Irrigation. The majority of the City's rate revenues, as shown in the chart, are derived from Residential customers (58.6%). In total - at present rates - the City is projected to receive approximately $8.6 million in rate revenues in FY 2025. Over the rate setting period, customer growth is expected to average 0.5% annually, resulting in total rate revenues of approximately $8.9 million by FY 2030.

In addition to rate revenues, the City also receives a variety of miscellaneous revenues. There are projected to be approximately $419,000 in miscellaneous revenues in FY 2025. Miscellaneous revenues are expected to decrease over time to $224,000 by FY 2030, primarily the result of using available reserves to fund capital improvement projects and resulting reduction in annual interest income.

On a combined basis - considering the rate revenues along with miscellaneous revenues - the City's total projected revenues are expected to be approximately $9.1 million FY 2025, which increases slightly through FY 2030, prior to proposed rate adjustments.

## 2.4 Projection of Operations and Maintenance Expenses

Operation and maintenance (O&M) expenses are incurred by the City to operate and maintain the City's water utility. The costs incurred in this area are expensed during the current year and are not capitalized or depreciated. In general, operation and maintenance (O&M) expenses are grouped into a number of different functional categories. To begin the process of projecting O&M expenses over the planning horizon, escalation factors were developed. Escalation factors were

developed for the various types of expenses incurred, such as salaries, benefits, materials and supplies, utilities, equipment, insurance, and miscellaneous expenses. Escalation factors were projected based on recent inflationary trends and are assumed to be approximately 3.0% - 15.0% per year.

Starting with the City's budgeted O&M expenses from the FY 2025 adopted budget, O&M expenses were escalated based on the previously mentioned escalation factors. Total O&M expenses for the City's water utility are budgeted at approximately $6.7 million in FY 2025. It is important to note that the cost of purchased water from Medford Water is a proportion of the City's O&M costs which is not controlled by the City and has significant increases as part of the Study. For FY 2025, purchased water costs are approximately $250,000 or 3.7% of the utility's total budgeted O&M expenses. Based on estimated future increases in purchased water costs, the Study assumes that these costs will increase 13.5% in FY 2026 and 10.0% in FY 2027 – FY 2030 as a result of Medford Water's rate increases.

No additional or new O&M expenses have been assumed at this time, with the exception of the expansion of the low income assistance program. In discussion with the City, it was decided that the low income assistance program would be expanded to include all low income customers and remove the senior citizen qualification for eligibility. In doing so, the expanded program cost was estimated by taking the current program cost divided by the historical total program participants to calculate a cost per participant, which was then applied to the new assumed number of participants based on the new eligibility requirements. As a result of this analysis, the program cost is expected to increase from $18,726 in FY 2024 to $33,120 in FY 2025. Given the assumed escalation factors and expansion of the customer assistance program, O&M expenses are projected to increase to approximately $8.4 million in FY 2030.

## 2.5 Capital Improvement Projects

The City developed a capital improvement plan that was utilized as the starting point for the capital funding plan as part of the water rate study. A key driver of the capital plan was the funding of the water treatment plant, distribution system improvements, City's share of the TAP improvements, and pump station improvements. Provided below in Table 2 – 1 is a summary of the annual capital improvement needs during the rate study review period.

| Table 2 – 1<br>Summary of the Water Capital Improvement Plan ($000s) | | | | | | |
|---|---|---|---|---|---|---|
| | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
| **Capital Improvement Projects** | **$3,694** | **$47,457** | **$42,785** | **$5,443** | **$3,133** | **$4,623** |
| ***Less: Outside Funding Sources*** | | | | | | |
| Unrestricted Reserves | $341 | $1,011 | $1,260 | $2,881 | $833 | $1,073 |
| SDCs Reserve | 12 | 1,000 | 0 | 0 | 0 | 0 |
| ARPA Grant - TAP | 2,515 | 0 | 0 | 0 | 0 | 0 |
| Grant Proceeds | 0 | 9,313 | 0 | 0 | 0 | 0 |
| Long-Term Debt Proceeds | 0 | 34,133 | 39,126 | 938 | 0 | 0 |
| Additional Revenue Bonds | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Funding Sources** | **$2,869** | **$45,457** | **$40,385** | **$3,818** | **$833** | **$1,073** |
| **Rate Funded Capital** | **$825** | **$2,000** | **$2,400** | **$1,625** | **$2,300** | **$3,550** |

The City's water capital improvement plan totals approximately $107.1 million from FY 2025 through FY 2030. The largest being the water treatment plant improvements in FY 2026 through FY 2028. The funding sources for the capital improvement projects are assumed to be from unrestricted reserve funds, existing system development charge (SDC) reserve funds, ARPA grant proceeds, long-term debt issuances, and annual rate funding of capital. There are a number of different methods which may be used to fund the capital needs. Among the methods that may be used to finance these capital improvement projects are long-term borrowing, grants, capital reserves, and rates. Historically, the City has used all available sources to fund capital improvements in an attempt to minimize the impact to customer's water rates. Provided below is a summary of the typical funding sources the City has used, and will use, to fund the planned improvements over the next five year period.

### 2.5.1 Rate Funded Capital

A general financial guideline states that, at a minimum, a utility should fund an amount equal to or greater than annual depreciation through rates. Annual depreciation expense reflects the current investment in plant being depreciated or "losing" its useful life. Therefore, this portion of plant investment needs to be replaced to maintain the existing level of infrastructure. In addition, consideration should be given to funding within rates an amount greater than annual depreciation expense for renewals and replacements as costs escalate over time. Whenever possible, the City should be funding water capital projects from rates in an amount greater than annual depreciation expense. For the water utility, the FY 2023 depreciation expense was $708,000. Over the course of the review period, the City is funding renewal and replacement projects at a level greater than depreciation expense. Based on the proposed rate transition plan, rate funded capital ranges from $825,000 in FY 2025 to $3.6 million in FY 2030, which accounts for an average of approximately 12.0% of total capital being funded annually.

### 2.5.2 Reserve Funding

The City has historically supplemented other funding sources with reserve funding for annual capital improvements. During the rate setting period, approximately $7.4 million in unrestricted reserve funds and $1.0 million in system development charge (SDC) reserves will be used to fund capital improvement projects in FY 2025 through FY 2030, which is equal to approximately 8.0% of the total capital improvement plan projects.

### 2.5.3 Long Term Debt

The City can also issue additional long-term debt as a source to fund capital projects. There can be a number of advantages and disadvantages with the issuance of long-term debt, and it is important to weigh them when deciding whether to issue or not. Long-term debt does have prudent applications whereby it acts as a financial device to spread the costs of a larger project, such as a new source of supply, over multiple years. Doing so then distributes the costs to the customers who are benefiting from the new project - in this case - and are said to be paying their "fair share" as opposed to cash financing where only current customers are paying for the project. Issuing debt should be done prudently and in a way that does not put excessive financial burden on the City's water utility. There should be a level of indebtedness that still allows the City flexibility should a financial crisis occur. As part of the City's water rate study, the City is planning on issuing approximately $74.2 million of long term debt for planned major capital projects such as the water treatment plant and dam safety improvement projects, which has been assumed to start in FY 2026 as part of the capital funding plan.

## 2.6 Projection of Debt Service

The final component of the City's water revenue requirement is debt service. At the present time, there are four outstanding debt obligations, with total annual debt service payments of approximately $890,000 in FY 2025. As mentioned above, the City has assumed additional long-term debt issuances starting in FY 2026 to fund future water capital projects. These issuances have additional debt service payments starting in FY 2026 of approximately $333,000 per year based on the assumed terms, increasing to approximately $667,000 in FY 2030. In total, annual debt service ranges from $890,000 in FY 2025 to $4.5 million in FY 2030.

It is important to note that HDR is not acting as a municipal advisor for the City. HDR did not recommend specific long-term debt issuances or terms. Rather, the Study simply aims to identify the existing annual debt service payments and projection of future long-term funding needs while utilizing conservative assumptions for modeling purposes only.

## 2.7 Summary of the Revenue Requirement

Given the above projections of revenues and expenses, a summary of the revenue requirement for the City's water utility can be developed. In developing the revenue requirement analysis, consideration was given to the financial planning policies of the City and key performance metrics. In particular, emphasis was placed on balancing customer bill impacts while still having adequate funds to support the operational activities, capital projects, and meet key financial metrics throughout the Study time period. Presented in Table 2 – 2 is a summary of the revenue

requirement. It is important to note that the annual deficiencies are cumulative, that is, any adjustment in the initial years will reduce the needed adjustment in following years.

**Table 2 – 2**
**Summary of the Water Revenue Requirement ($000s)**

| | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Revenues** | | | | | | |
| Rate Revenues | $8,644 | $8,687 | $8,730 | $8,774 | $8,818 | $8,862 |
| Other Revenues | 419 | 381 | 342 | 291 | 246 | 224 |
| **Total Revenues** | **$9,063** | **$9,068** | **$9,072** | **$9,065** | **$9,064** | **$9,086** |
| **Expenses** | | | | | | |
| Total O&M Expenses | $6,732 | $7,106 | $7,456 | $7,784 | $8,117 | $8,438 |
| Taxes & Transfers | 770 | 747 | 752 | 757 | 763 | 768 |
| Rate Funded Capital | 825 | 2,000 | 2,400 | 1,625 | 2,300 | 3,550 |
| Net Debt Service | 726 | 287 | 774 | 2,641 | 3,241 | 3,562 |
| Reserve Funding | 10 | 15 | 20 | 12 | 28 | 18 |
| **Total Revenue Requirement** | **$9,063** | **$10,154** | **$11,402** | **$12,819** | **$14,449** | **$16,336** |
| Bal. / (Def.) of Funds | $0 | ($1,173) | ($2,516) | ($4,055) | ($5,816) | ($7,830) |
| Balance as % of Rev from Rates | 0.0% | 13.5% | 28.8% | 46.2% | 66.0% | 88.4% |
| **Proposed Rate Adjustment** | **0.0%** | **13.5%** | **13.5%** | **13.5%** | **13.5%** | **13.5%** |
| Add'l Revenue with Rate Adj. | $0 | $1,173 | $2,516 | $4,055 | $5,816 | $7,830 |
| Bal. / (Def.) After Rate Adj. | 0 | 0 | 0 | 0 | 0 | 0 |

The results of the revenue requirement analysis indicate a deficiency of funds over the rate setting period (FY 2026 – FY 2030). The deficiency ranges by year and is driven by the capital funding plan, meeting financial targets, and annual operating expenses. The cumulative deficiency is approximately $1.2 million in FY 2026, which increases to $7.8 million by FY 2030, prior to rate adjustments. The proposed adjustments provide adequate funding for annual operating, debt service, and capital needs. To provide adequate funding for the City's water utility and to meet financial targets, rate adjustments of 13.5% are proposed annually in FY 2026 through FY 2030.

## 2.8 Review of Reserve Levels

Reserves are an important component of a utility's financial health. There can be many different purposes for reserves. For modeling purposes, the City's water utility has an unrestricted reserve as well as an SDC reserve. The target ending minimum fund balances vary depending on the type of fund. The target balance for the unrestricted fund was set at 25% of annual O&M expenses with an additional contingency target of 3% of annual O&M expenses, which is approximately $1.9 million for FY 2025. For the SDC reserve, there was no minimum target identified as these reserve levels vary as growth related capital projects are funded and SDC revenues are collected.

Based on the rate transition plan, the City will be funding reserves over the five-year rate setting period to meet target minimums and maintain prudent levels of reserves. The unrestricted and SDC reserves appear to remain strong and fluctuate as funds are used to fund planned capital improvement projects.

## 2.9 Debt Service Coverage Ratio (DSC)

Long-term debt often contains covenants requiring rates to be set at an adequate level to assure annual payments of principal and interest. This is typically known as a debt service coverage ratio (DSC). The DSC ratio is a financial measure of the utility's ability to repay the debt. In general, the DSC ratio is set at a level such that revenues less operating expenses will be 1.25 times, for example, greater than the maximum annual debt service on the outstanding debt. That is, rates will be sufficient to pay projected O&M and have an additional 25% more than the annual debt service payment. Currently, the water utility DSC ratio is estimated at 2.62 in FY 2025 and with the additional assumed long-term debt issuance in FY 2026 and the proposed rate adjustments, the DSC ratio remains strong, calculated at 1.88 in FY 2030.

## 2.10 Water Revenue Requirement Recommendations

Based on the revenue requirement analysis developed herein, HDR recommends that the City's water rates be increased over the review period to fund the operating and capital needs of the utility. The anticipated adjustments would allow for the City to fully fund its water operations and planned capital improvements as well as put it on financially secure footing going forward.

# 3 Cost of Service Analysis

In the previous section, the revenue requirement analysis focused on the total revenues required to adequately fund the City's water utility. This section will discuss the development of the cost of service analysis. A cost of service analysis is concerned with the proportional distribution of the total revenue requirement between the identified customer classes of service (Residential, Multi-Family, Residential Irrigation, Commercial, Institutional, Commercial Irrigation, and Institutional Irrigation). The previously developed revenue requirement was utilized in the development of the cost of service analysis.

In recent years, increasing emphasis has been placed on cost of service studies by government agencies, customers, utility regulatory commissions, and other parties. This interest has been generated in part by continued inflationary trends, increased operating and capital expenditures, and concerns of equity in rates among customers. Following the generally accepted guidelines and principles of a cost of service analysis will inherently lead to rates which are proportional, cost-based, and not viewed as arbitrary or capricious in nature.

## 3.1 Objectives of a Cost of Service Study

There are two primary objectives in conducting a cost of service study:

- Proportionally distribute the revenue requirement between the customer classes of service
- Derive average unit costs for subsequent rate designs

The objectives of the cost of service analysis are different from determining the revenue requirement. As noted in the previous section (Section 2), a revenue requirement analysis determines the utility's overall financial needs, whereas the cost of service analysis determines the proportional manner in which to collect the revenue requirement from each class of service. The second rationale for conducting a cost of service analysis is to develop proposed water rates that properly reflect the costs incurred by the City. For example, a water utility incurs costs related to average day, peak day, fire protection, and customer cost components. A water utility must build sufficient capacity to meet peak capacity needs. Therefore, those customers creating this peak requirement should pay their proportional share of the cost to meet this peak demand requirement. Each of these types of costs may be collected in a slightly different manner as to allow for the development of rates that collect costs in the same manner as they are incurred.

## 3.2 Determining the Customer Classes of Service

The first step in a cost of service study is to determine the customer classes of service. Currently, the City has rate schedules for each customer class of service. In discussion with the City, it was determined that the customer classes of service could be grouped together based on rate schedule and characteristic similarities. Based on the City's current rate schedules, the classes of service used within the water cost of service analysis are:

- Residential/Multi-Family/Residential Irrigation/Commercial
- Institutional
- Commercial and Institutional Irrigation

In determining classes of service for cost of service purposes, the objective is to group customers together into similar or homogeneous groups based on facility requirements and/or flow characteristics.

## 3.3 General Cost of Service Procedures

In order to determine the cost to serve each customer class of service on the City's water system, a cost of service analysis is conducted. A cost of service analysis utilizes a three-step approach to review costs. These are functionalization, allocation, and distribution. Provided below is a detailed discussion of the water cost of service analysis conducted for the City, and the specific steps taken within the analysis.

### 3.3.1 Functionalization of Costs

The first analytical step in the cost of service process is called functionalization. Functionalization is the arrangement of expense and asset (infrastructure) data by major operating functions. For example, the water utility incurs costs related to source of supply, treatment, pumping, distribution, etc. Within the City's water cost of service analysis, the functionalization of the cost data was accomplished through the City's system of accounts.

### 3.3.2 Allocation of Costs

The second analytical task performed in a water cost of service analysis is the allocation of costs. Allocation determines why the expenses were incurred or what type of need is being met. The City's assets and revenue requirement (operating expenses) were reviewed and allocated using the following cost allocations:

- **Commodity-Related Costs:** Costs associated with commodity are those incurred under average load (demand) conditions and are generally specified for a period of time such as a year. Chemicals or electricity used in the treatment of water are an example of a commodity-related cost since these costs tend to vary based on the total production of water.
- **Capacity-Related Costs:** Capacity costs are those which vary with peak demand, or the maximum rates of flow to customers. For water utilities, capacity-related costs are generally related to the sizing of facilities needed to meet a customer's maximum water demand at any point in time. For example, portions of distribution storage

reservoirs and mains (pipes) must be adequately sized for this particular type of requirement.

- **Customer-Related Costs:** Customer costs are those which vary with the number of customers on the system and are not impacted by differences in consumption levels. An example is postage for mailing bills as the cost does not differ from customer to customer based on the size or consumption characteristics of that customer.
- **Fire Protection-Related Costs:** Fire protection costs are costs related to public and private fire protection functions. Fire protection related costs are related to hydrants, the over-sizing of mains and distribution storage reservoirs.
- **Revenue-Related Costs:** Certain costs associated with the utility may vary with the amount of revenue received. An example is a utility tax based on the amount of rate revenues received by the water utility.
- **Direct Assignments:** Certain costs associated with operating the system may be directly traced to a specific customer or class of service, which are then directly assigned to that specific class of service. In this way, other classes of service will not be allocated any costs for those significant facilities from which they do not benefit.

### 3.3.3 Development of Distribution Factors

Once the allocation process is complete, and the customer groups have been defined, the allocated costs are distributed to each customer class of service. The City's allocated costs were distributed to the identified customer groups using the following distribution factors.

- **Commodity Distribution Factor:** As noted, commodity-related costs vary with the total flow of water. The commodity distribution factor was based on the projected total metered consumption plus system losses for each class of service for the projected test period. The consumption for this Study, and distribution factor, is based on the consumption data from June 2023 – May 2024 as provided by the City.
- **Capacity Distribution Factor:** The capacity distribution factor was developed based on the estimated contribution to peak day use of each class. Peak day use by customer group was estimated using monthly metered consumption data for each customer class of service. The peaking factor was defined as the relationship between peak month contribution and average month use and was determined for each customer class based on the review of the City's consumption data.
- **Customer Distribution Factor:** Customer costs vary with the number of customers on the system. Two basic types of customer distribution factors were identified – actual and weighted. The distribution factor for actual customer was based on the projection of the number of customers developed within the revenue requirement. The weighted customer distribution factor reflects the disproportionate costs associated with serving different types of customers. The weighted customer factor is based on equivalent meters and services and is used to represent the potential capacity requirements or demand that different customer meter sizes place on the system.

- **Public Fire Protection Distribution Factor:** The development of the distribution factor for public fire protection expenses involved an analysis of each class of service and fire flow requirements.

## 3.4 Functionalization and Allocation of Operating Expenses

For the City's Study, the revenue requirement for FY 2026 was functionalized, allocated, and distributed. For the allocation of the operating expenses, the line item detail of the O&M was used to describe the functional category and suggests a manner in which to allocate. As noted earlier, the City utilized a cash basis revenue requirement, which was comprised of O&M expenses, debt service, reserve funding, and rate funded capital. A more detailed review of the allocation of the revenue requirement can be found in the Technical Appendix in Exhibit 15. Shown below in Table 3 – 1 is a summary of the allocation of the FY 2026 revenue requirement to the different allocation components.

**Table 3 – 1**
**Summary of FY 2026 Allocated Revenue Requirement ($000s)**

| Total | Commodity | Capacity | Actual Customer | Weighted Customer | Fire Protection | Revenue Related |
|---|---|---|---|---|---|---|
| $9,773 | $1,637 | $3,084 | $1,878 | $2,887 | $287 | $0 |

## 3.5 Major Assumptions of the Cost of Service Study

A number of key assumptions were used within the City's water cost of service analysis. Below is a brief discussion of the major assumptions used.

- The test period used for the cost of service analysis was FY 2026. The revenue and expense data was previously developed within the revenue requirement analysis
- A cash basis approach was utilized, which conforms to generally accepted water cost of service approaches and methodologies
- Infrastructure costs were based on the City's historical asset records for the water utility
- The allocation of plant in service was developed based on generally accepted cost allocation techniques and the City's unique system and operations
- Metered consumption data used within the Study was provided by the City for each class of service from historical usage information
- Capacity distribution factors were based on a review of the metered consumption data for each customer class of service, and the relationship of peak month consumption to average month consumption

## 3.6 Summary of the Cost of Service Results

In summary, the cost of service analysis began by functionalizing the City's revenue requirement (costs). The functionalized expenses were then allocated to the appropriate cost component(s). The individual allocation totals were then distributed to each of the customer classes of service based on the appropriate distribution factors. The distributed expenses for each customer class were then aggregated to determine each customer class's overall revenue responsibility. A summary of the detailed cost responsibility developed for each class of service is shown in Table 3 – 2.

**Table 3 – 2**
**Summary of the FY 2026 Water Cost of Service Analysis ($000s)**

| Class of Service | Present Rate Revenues | Distributed Costs | $ Difference | % Difference |
|---|---|---|---|---|
| Res / MF / Res Irr/Com | $7,295 | $8,288 | ($1,072) | 14.7% |
| Institutional | 341 | 388 | (51) | 14.8% |
| Com Irr/ Inst Irr | 1,050 | 1,097 | (50) | 4.8% |
| **Total** | **$8,687** | **$9,773** | **($1,173)** | **13.5%** |

When looking at the water system and distributing its costs, it is important to keep in mind the different customer class's consumption characteristics and facility requirements. The results of the water cost of service, as provided in Table 3 – 2, show minor calculated cost differences between serving the customer classes of service. A general guideline is that if a customer group is within +/- 5% of the overall system revenue adjustment, then the customer class is paying its proportional share of the costs to provide service. This guideline reflects that over time, customer usage characteristics change, as does the revenue requirement, which can result in changes in the cost allocation and cost of service results.

In general, the results of the cost of service analysis show that the customer class revenues reasonably reflect the cost to provide service. Given these results, it is recommended that the City continue to use specific rate schedules for each customer class of service (Residential, Multi-Family, Residential Irrigation, Commercial, Institutional, Commercial Irrigation, and Institutional Irrigation) to reflect the customer characteristics and costs associated with providing service to each customer class.

## 3.7 Consultant's Conclusions and Recommendations

As was noted in Table 3 – 2, minor differences in the cost of service exist between the customer classes of service. At this time, no cost of service adjustments are proposed as the overall distribution of costs reasonably reflect the revenues received from each of the customer classes of service. It is important to note that cost of service results can change over time as customer consumption patterns and facility requirements change as a result of rate adjustments, economic factors, or other influences on water consumption.

# 4 Rate Design Analysis

The final step of the water rate study process is the design of proposed water rates to collect the desired levels of revenues, based on the results of the revenue requirement and cost of service analyses. In reviewing the rate designs, consideration is given to the level of the rates and the structure of the rates.

## 4.1 Rate Design Goals and Objectives

Prudent rate administration dictates that several criteria must be considered when setting utility rates. Some of these rate design goals are listed below:

- Rates which are easy to understand from the customer's perspective
- Rates which are easy for the utility to administer
- Consideration of the customer's ability to pay
- Continuity, over time, of the rate making philosophy
- Policy considerations (e.g., economic development)
- Provide revenue stability from month to month and year to year
- Promote efficient allocation of the resource
- Non-discriminatory (cost-based)

Many contemporary rate economists and regulatory agencies feel that the last consideration, cost-based rates, should be of paramount importance and provides the primary guidance to utilities on rate structure and policy. It is important that the City provide its water customers with a proper price signal as to what their consumption is costing. This goal may be approached through rate level and structure. When developing the proposed rate designs, all the above listed criteria were taken into consideration. However, it should be noted that it is difficult, if not impossible, to design a rate that meets each of the goals and objectives listed above. For example, it may be difficult to design a rate that takes into consideration the customer's ability to pay, and one which is cost-based. In designing rates, there are always trade-offs between the goals and objectives.

### 4.1.1 Present and Proposed Water Rates

In developing the proposed water rates, the City's existing rate structures for each customer class of service were reviewed. The City's current rate structures include a fixed customer charge, a fixed meter charge that varies by meter size, and a variable consumption charge that varies by customer class of service. The variable consumption charges are on a tiered basis for all customers with the exception of commercial and institutional irrigation, which have seasonal uniform rates, and institutional, which has a uniform rate. Given the cost of service analysis, and in discussion with City staff, the City will continue to have separate rate schedules for each customer class of service.

The fixed customer charge is currently the same for all customers and would be maintained in the proposed rates. For the fixed meter charge, it is proposed to transition the charge for all customer classes over the five-year rate setting period to reflect the AWWA safe operating

capacity ratios. The fixed meter charge starts at a 3/4" meter and increases with the size of the meter, where the cost is based on the meter size to reflect the capacity and potential demands each customer may place on the water system.

For the variable consumption charges, the tiered structures for all customers, regardless of customer class, were maintained with regards to the size and number of tiers. The minor change that was included was utilizing the peaking factors from the City's customer consumption data to develop tier differentials that better reflect the City's current customer usage characteristics. After the first year, the fixed customer and variable consumption charges are adjusted equally by the proposed rate adjustment in each year. The fixed meter charge is to be transitioned to the AWWA equivalent factors in the final year, year five, of the proposed rate transition plan.

As noted in the prior discussion in Section 3, the cost of service results showed minor differences in costs. In order to address the differences, minor adjustment in the proposed water rates by class of service were developed for the customer class specific rate structures, however, the general structure was maintained for each class of service. As noted, the fixed customer and meter charges are the same for all customers. Provided below in Table 4 – 1 is a summary of the present and proposed fixed water rates which applies to each of the customer classes of service.

**Table 4 – 1**
**Summary of the Present and Proposed Fixed Water Rates**

| | Present Rate | Proposed FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Customer Charge** | ***$ / Acct./ Mo.*** | | | | | |
| All Customers | $13.33 | $16.50 | $19.25 | $22.00 | $25.10 | $29.00 |
| **Meter Charge** | ***$ / Acct./ Mo.*** | | | | | |
| 3/4" | $15.62 | $15.95 | $18.10 | $20.54 | $23.31 | $26.46 |
| 1" | 16.29 | 18.63 | 23.42 | 29.15 | 36.00 | 44.19 |
| 1.5" | 74.52 | 71.50 | 75.92 | 80.24 | 84.34 | 88.11 |
| 2" | 118.41 | 113.73 | 120.92 | 127.97 | 134.73 | 141.03 |
| 3" | 237.45 | 225.87 | 237.49 | 248.14 | 257.35 | 264.60 |
| 4" | 376.59 | 360.81 | 382.52 | 403.52 | 423.26 | 441.09 |
| 6" | 741.01 | 711.65 | 756.51 | 800.52 | 842.70 | 881.91 |
| 8" | 1,174.75 | 1,129.78 | 1,202.87 | 1,275.15 | 1,345.12 | 1,411.11 |

Table 4 – 2 summarizes the variable consumption charges for each of the customer classes of service.

## Table 4 – 2
## Summary of the Present and Proposed Water Consumption Rates

| | Present Rate | Proposed FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Residential and Multi-Family** | | | | | | |
| **October – May** | *$ /cf.* | | | | | |
| 0 - 300 | $0.0280 | $0.0263 | $0.0299 | $0.0339 | $0.0385 | $0.0437 |
| 301 - 1,000 | 0.0348 | 0.0425 | 0.0482 | 0.0547 | 0.0621 | 0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| Over 2,500 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| **June – September** | *$ /cf.* | | | | | |
| 0 - 300 | $0.0280 | $0.0263 | $0.0299 | $0.0339 | $0.0385 | $0.0437 |
| 301 - 1,000 | 0.0348 | 0.0425 | 0.0482 | 0.0547 | 0.0621 | 0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| 2,501 - 3,600 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| Over 3,600 | 0.0784 | 0.0957 | 0.1087 | 0.1234 | 0.1401 | 0.1590 |
| **Residential Irrigation** | | | | | | |
| **October – May** | *$ /cf.* | | | | | |
| 0 - 1,000 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| Over 2,500 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| **June – September** | *$ /cf.* | | | | | |
| 0 - 1,000 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| 2,501 - 3,600 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| Over 3,600 | 0.0784 | 0.0957 | 0.1087 | 0.1234 | 0.1401 | 0.1590 |
| **Commercial** | | | | | | |
| **Less than 2" Meter** | *$ /cf.* | | | | | |
| 0 - 2,500 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| Over 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| **2" Meter or Larger** | | | | | | |
| 0 - 15,000 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| Over 15,000 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| **Institutional** | *$ /cf.* | | | | | |
| All Consumption | $0.0334 | $0.0416 | $0.0472 | $0.0536 | $0.0608 | $0.0690 |
| **Commercial and Institutional Irrigation** | | | | | | |
| **October – May** | *$ /cf.* | | | | | |
| Non-Peak Consumption | $0.0376 | $0.0367 | $0.0417 | $0.0473 | $0.0537 | $0.0609 |
| **June – September** | *$ /cf.* | | | | | |
| Peak Consumption | $0.0510 | $0.0615 | $0.0698 | $0.0792 | $0.0899 | $0.1020 |

## 4.2 Summary of the Water Rate Study

This completes the analysis for the City's water utility. Based on the operating and capital needs as well as meeting key financial metrics, it is recommended that the City's water rates be increased annually by 13.5% in FY 2026 through FY 2030 as developed in this Study. Full and complete technical appendices of the development of the City's water rate study and the proposed rate adjustments can be found in the Technical Appendix of this report.

# Technical Appendix

**City of Ashland**
**Water Rate Study**
**Summary of the Revenue Requirement**
**Exhibit 1**

| | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FY 2031 | FY 2032 | FY 2033 |
|---|---|---|---|---|---|---|---|---|---|
| **Revenues** | | | | | | | | | |
| Rate Revenues | $8,643,721 | $8,686,940 | $8,730,374 | $8,774,026 | $8,817,896 | $8,861,986 | $8,906,296 | $8,950,827 | $8,995,581 |
| Miscellaneous Revenues | 419,129 | 381,088 | 341,503 | 291,010 | 245,962 | 223,585 | 199,748 | 202,588 | 231,244 |
| **Total Revenues** | **$9,062,849** | **$9,068,028** | **$9,071,877** | **$9,065,036** | **$9,063,858** | **$9,085,571** | **$9,106,044** | **$9,153,415** | **$9,226,825** |
| **Expenses** | | | | | | | | | |
| Water Conservation | $295,483 | $311,865 | $326,868 | $339,858 | $352,931 | $365,304 | $378,114 | $391,378 | $405,112 |
| Water Supply | 777,433 | 839,962 | 895,187 | 950,855 | 1,008,877 | 1,070,879 | 1,112,220 | 1,155,189 | 1,199,852 |
| Water Distribution | 3,728,187 | 3,907,033 | 4,080,972 | 4,247,526 | 4,415,263 | 4,575,026 | 4,740,624 | 4,912,273 | 5,090,195 |
| Water Treatment | 1,930,906 | 2,046,795 | 2,153,300 | 2,246,142 | 2,339,527 | 2,426,294 | 2,516,304 | 2,609,679 | 2,706,546 |
| Additional Staffing | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Operations & Maintenance** | **$6,732,009** | **$7,105,656** | **$7,456,327** | **$7,784,382** | **$8,116,597** | **$8,437,503** | **$8,747,263** | **$9,068,520** | **$9,401,706** |
| Taxes & Transfers | $770,000 | $833,575 | $938,385 | $1,057,713 | $1,193,594 | $1,348,178 | $1,400,009 | $1,453,899 | $1,509,928 |
| Rate Funded Capital | 825,000 | 2,000,000 | 2,400,000 | 1,625,000 | 2,300,000 | 3,550,000 | 3,800,000 | 4,100,000 | 4,400,000 |
| Net Debt Service | 725,768 | 286,609 | 773,571 | 2,640,941 | 3,240,915 | 3,561,934 | 3,561,935 | 3,561,934 | 3,561,934 |
| Total Reserve Funding | 10,072 | 14,925 | 19,907 | 11,788 | 28,364 | 18,047 | 53,221 | 78,460 | 143,471 |
| **Total Revenue Requirement** | **$9,062,849** | **$10,240,765** | **$11,588,189** | **$13,119,824** | **$14,879,469** | **$16,915,661** | **$17,562,428** | **$18,262,814** | **$19,017,039** |
| Bal. / (Def.) of Funds | $0 | ($1,172,737) | ($2,516,312) | ($4,054,788) | ($5,815,611) | ($7,830,090) | ($8,456,385) | ($9,109,399) | ($9,790,214) |
| Balance a % of Rate Adj. Req'd | 0.0% | 13.5% | 28.8% | 46.2% | 66.0% | 88.4% | 94.9% | 101.8% | 108.8% |
| **Proposed Rate Adjustment** | **0.0%** | **13.5%** | **13.5%** | **13.5%** | **13.5%** | **13.5%** | **3.5%** | **3.5%** | **3.5%** |
| Add'l Revenue with Rate Adj. | $0 | $1,172,737 | $2,516,312 | $4,054,788 | $5,815,611 | $7,830,090 | $8,456,385 | $9,109,399 | $9,790,214 |
| Bal. / (Def.) After Rate Adj. | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| **Additional Rate Adjustment Required** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** |
| Residential Customer Bill @ 700 CF | $51.27 | $58.19 | $66.05 | $74.96 | $85.08 | $96.57 | $99.95 | $103.45 | $107.07 |
| **Total Ending Cash Reserves (excluding proceeds)** | **$11,959,205** | **$9,974,419** | **$8,745,758** | **$5,888,097** | **$5,094,836** | **$4,050,632** | **$3,140,281** | **$4,229,986** | **$5,384,701** |

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**City of Ashland**
**Water Rate Study**
**Escalations**
**Exhibit 2**

| | *Budgeted* | *Projected* | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | **FY 2025** | **FY 2026** | **FY 2027** | **FY 2028** | **FY 2029** | **FY 2030** | **FY 2031** | **FY 2032** | **FY 2033** | ***Notes*** |
| **Revenues** | | | | | | | | | | |
| Customer Growth | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | |
| Consumption Growth | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | |
| Miscellaneous Revenues | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | |
| **Expenses** | | | | | | | | | | |
| Salaries | Budget | 6.0% | 5.0% | 4.0% | 3.5% | 3.5% | 3.5% | 3.5% | 3.5% | |
| Benefits | Budget | 4.5% | 4.5% | 4.5% | 4.5% | 4.0% | 4.0% | 4.0% | 4.0% | |
| Benefits - Medical | Budget | 10.0% | 8.0% | 6.0% | 5.0% | 4.5% | 4.5% | 4.5% | 4.5% | |
| Professional Services | Budget | 6.0% | 5.0% | 4.0% | 3.5% | 3.5% | 3.5% | 3.5% | 3.5% | |
| Materials & Supplies | Budget | 3.5% | 3.5% | 3.5% | 3.5% | 3.0% | 3.0% | 3.0% | 3.0% | |
| Equipment | Budget | 4.5% | 4.5% | 4.5% | 4.5% | 4.0% | 4.0% | 4.0% | 4.0% | |
| Miscellaneous | Budget | 3.5% | 3.5% | 3.5% | 3.5% | 3.2% | 3.2% | 3.2% | 3.2% | |
| Utilities | Budget | 5.0% | 5.0% | 5.0% | 5.0% | 4.0% | 4.0% | 4.0% | 4.0% | |
| Purchased Water | Budget | 13.5% | 10.0% | 10.0% | 10.0% | 10.0% | 4.0% | 4.0% | 4.0% | |
| CIP | 4.5% | 4.0% | 4.0% | 4.0% | 4.0% | 3.5% | 3.5% | 3.5% | 3.5% | 3.0% |
| Flat | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 15.0% |
| Insurance | Budget | 15.0% | 10.0% | 5.0% | 5.0% | 4.0% | 4.0% | 4.0% | 4.0% | |
| **Interest** | 2.5% | 2.5% | 2.5% | 2.5% | 2.5% | 2.5% | 2.5% | 2.5% | 2.5% | |
| **New Debt Service** | | | | | | | | | | |
| ***Low Interest Loans*** | | | | | | | | | | |
| Term in Years | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | |
| Rate | 3.3% | 3.3% | 3.3% | 3.3% | 3.3% | 3.3% | 3.3% | 3.3% | 3.3% | |
| ***Revenue Bond*** | | | | | | | | | | |
| Term in Years | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | |
| Rate | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% | |

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**City of Ashland**
**Water Rate Study**
**Revenue Requirement**
**Exhibit 3**

| | *Budgeted* | *Projected* | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | **FY 2025** | **FY 2026** | **FY 2027** | **FY 2028** | **FY 2029** | **FY 2030** | **FY 2031** | **FY 2032** | **FY 2033** | ***Notes*** |
| **Revenues** | | | | | | | | | | |
| ***Rate Revenues*** | | | | | | | | | | |
| Residential | $5,068,761 | $5,094,105 | $5,119,576 | $5,145,173 | $5,170,899 | $5,196,754 | $5,222,738 | $5,248,851 | $5,275,096 | Exhibit 7 |
| Residential Irrigation | 94,492 | 94,964 | 95,439 | 95,916 | 96,396 | 96,878 | 97,362 | 97,849 | 98,339 | Exhibit 7 |
| Multi-Family | 1,000,679 | 1,005,682 | 1,010,711 | 1,015,764 | 1,020,843 | 1,025,947 | 1,031,077 | 1,036,233 | 1,041,414 | Exhibit 7 |
| Commercial | 1,095,176 | 1,100,652 | 1,106,155 | 1,111,686 | 1,117,244 | 1,122,830 | 1,128,445 | 1,134,087 | 1,139,757 | Exhibit 7 |
| Commercial Irrigation | 359,960 | 361,760 | 363,569 | 365,386 | 367,213 | 369,049 | 370,895 | 372,749 | 374,613 | Exhibit 7 |
| Institutional | 339,453 | 341,150 | 342,856 | 344,570 | 346,293 | 348,025 | 349,765 | 351,514 | 353,271 | Exhibit 7 |
| Institutional Irrigation | 685,200 | 688,626 | 692,069 | 695,529 | 699,007 | 702,502 | 706,014 | 709,544 | 713,092 | Exhibit 7 |
| ***Total Rate Revenues*** | **$8,643,721** | **$8,686,940** | **$8,730,374** | **$8,774,026** | **$8,817,896** | **$8,861,986** | **$8,906,296** | **$8,950,827** | **$8,995,581** | |
| ***Other Revenues*** | | | | | | | | | | |
| Miscellaneous Services | $40,000 | $40,200 | $40,401 | $40,603 | $40,806 | $41,010 | $41,215 | $41,421 | $41,628 | As Miscellaneous Revenues |
| Miscellaneous Income | 26,000 | 26,130 | 26,261 | 26,392 | 26,524 | 26,657 | 26,790 | 26,924 | 27,058 | As Miscellaneous Revenues |
| Interest Income | 303,129 | 264,508 | 224,340 | 173,261 | 127,625 | 104,656 | 80,224 | 82,466 | 110,522 | Calculated on Reserves |
| New Service Installation | 50,000 | 50,250 | 50,501 | 50,754 | 51,008 | 51,263 | 51,519 | 51,776 | 52,035 | As Miscellaneous Revenues |
| ***Total Other Revenues*** | **$419,129** | **$381,088** | **$341,503** | **$291,010** | **$245,962** | **$223,585** | **$199,748** | **$202,588** | **$231,244** | |
| **Total Revenues** | **$9,062,849** | **$9,068,028** | **$9,071,877** | **$9,065,036** | **$9,063,858** | **$9,085,571** | **$9,106,044** | **$9,153,415** | **$9,226,825** | |

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| | | *Budgeted* | *Projected* | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **FY 2025** | **FY 2026** | **FY 2027** | **FY 2028** | **FY 2029** | **FY 2030** | **FY 2031** | **FY 2032** | **FY 2033** | ***Notes*** |
| **Expenses** | | | | | | | | | | | |
| ***Water Conservation*** | | | | | | | | | | | |
| Regular Employees | *510100* | $64,256 | $68,111 | $71,517 | $74,378 | $76,981 | $79,675 | $82,464 | $85,350 | $88,337 | As Salaries |
| Sick Leave Pay Out | *510112* | 400 | 418 | 437 | 456 | 477 | 496 | 516 | 537 | 558 | As Benefits |
| Vacation Pay Out | *510113* | 150 | 157 | 164 | 171 | 179 | 186 | 193 | 201 | 209 | As Benefits |
| Scheduled Overtime | *510310* | 2,000 | 2,120 | 2,226 | 2,315 | 2,396 | 2,480 | 2,567 | 2,657 | 2,750 | As Salaries |
| FICA/MEDICARE Contributions | *520100* | 5,111 | 5,341 | 5,581 | 5,833 | 6,095 | 6,339 | 6,592 | 6,856 | 7,130 | As Benefits |
| Employer's Share | *520210* | 5,667 | 5,922 | 6,189 | 6,467 | 6,758 | 7,028 | 7,309 | 7,602 | 7,906 | As Benefits |
| Employer's UAL Share | *520215* | 9,563 | 9,993 | 10,443 | 10,913 | 11,404 | 11,860 | 12,335 | 12,828 | 13,341 | As Benefits |
| Employee Share Paid by Cty/Pks | *520220* | 4,008 | 4,248 | 4,461 | 4,639 | 4,802 | 4,970 | 5,144 | 5,324 | 5,510 | As Salaries |
| HRAVEBA | *520223* | 2,004 | 2,094 | 2,188 | 2,287 | 2,390 | 2,485 | 2,585 | 2,688 | 2,796 | As Benefits |
| Deferred Comp | *520224* | 600 | 627 | 655 | 685 | 716 | 744 | 774 | 805 | 837 | As Benefits |
| Other Benefits | *520225* | 70 | 73 | 76 | 80 | 83 | 87 | 90 | 94 | 98 | As Benefits |
| Group Health Insurance | *520300* | 27,800 | 31,970 | 35,167 | 36,925 | 38,772 | 40,322 | 41,935 | 43,613 | 45,357 | As Insurance |
| Worker's Compensation | *520400* | 102 | 108 | 114 | 118 | 122 | 126 | 131 | 135 | 140 | As Salaries |
| Office Supplies | *601100* | 1,000 | 1,035 | 1,071 | 1,109 | 1,148 | 1,182 | 1,217 | 1,254 | 1,292 | As Materials & Supplies |
| Small Tools & Ops Supplies | *601200* | 100 | 104 | 107 | 111 | 115 | 118 | 122 | 126 | 130 | As Miscellaneous |
| Uniforms - Clothing | *601300* | 75 | 78 | 80 | 83 | 86 | 89 | 91 | 94 | 97 | As Materials & Supplies |
| Meeting Supplies | *601610* | 100 | 104 | 107 | 111 | 115 | 118 | 122 | 125 | 129 | As Materials & Supplies |
| Books & Periodicals | *601700* | 100 | 104 | 107 | 111 | 115 | 118 | 122 | 125 | 129 | As Materials & Supplies |
| Fuel | *602120* | 300 | 311 | 321 | 333 | 344 | 355 | 365 | 376 | 387 | As Materials & Supplies |
| Communications | *603100* | 500 | 530 | 557 | 579 | 599 | 620 | 642 | 664 | 687 | As Professional Services |
| Postage | *603400* | 50 | 52 | 54 | 55 | 57 | 59 | 61 | 63 | 65 | As Materials & Supplies |
| Professional Services | *604100* | 1,500 | 1,590 | 1,670 | 1,736 | 1,797 | 1,860 | 1,925 | 1,992 | 2,062 | As Professional Services |
| Internal Chg - Administrative | *605810* | 36,654 | 37,937 | 39,265 | 40,639 | 42,061 | 43,407 | 44,796 | 46,230 | 47,709 | As Miscellaneous |
| Internal Chg - Insurance Svc | *605811* | 3,965 | 4,560 | 5,016 | 5,267 | 5,530 | 5,751 | 5,981 | 6,220 | 6,469 | As Insurance |
| Internal Chg - Facility Use | *605813* | 17,139 | 17,910 | 18,716 | 19,558 | 20,439 | 21,256 | 22,106 | 22,991 | 23,910 | As Equipment |
| Internal Chg - Fleet Maint | *605814* | 936 | 978 | 1,022 | 1,068 | 1,116 | 1,161 | 1,207 | 1,256 | 1,306 | As Equipment |
| Internal Chg - Equip Replacmnt | *605815* | 5,533 | 5,782 | 6,042 | 6,314 | 6,598 | 6,862 | 7,137 | 7,422 | 7,719 | As Equipment |
| Advertising | *606100* | 4,000 | 4,240 | 4,452 | 4,630 | 4,792 | 4,960 | 5,133 | 5,313 | 5,499 | As Professional Services |
| Air | *606311* | 400 | 420 | 441 | 463 | 486 | 506 | 526 | 547 | 569 | As Utilities |
| Personal Vehicle Mileage | *606313* | 500 | 518 | 536 | 554 | 574 | 592 | 611 | 631 | 651 | As Miscellaneous |
| Lodging | *606320* | 1,000 | 1,035 | 1,071 | 1,109 | 1,148 | 1,184 | 1,222 | 1,261 | 1,302 | As Miscellaneous |
| Meals | *606330* | 350 | 362 | 375 | 388 | 402 | 414 | 428 | 441 | 456 | As Miscellaneous |
| Training | *606400* | 1,000 | 1,035 | 1,071 | 1,109 | 1,148 | 1,184 | 1,222 | 1,261 | 1,302 | As Miscellaneous |
| Dues | *606500* | 3,600 | 3,726 | 3,856 | 3,991 | 4,131 | 4,263 | 4,400 | 4,540 | 4,686 | As Miscellaneous |
| Conservation Programs - City | *610100* | 94,950 | 98,273 | 101,713 | 105,273 | 108,957 | 112,444 | 116,042 | 119,755 | 123,588 | As Miscellaneous |
| ***Total Water Conservation*** | | **$295,483** | **$311,865** | **$326,868** | **$339,858** | **$352,931** | **$365,304** | **$378,114** | **$391,378** | **$405,112** | |
| ***Water Supply*** | | | | | | | | | | | |
| Meeting Supplies | *601610* | $251 | $260 | $269 | $278 | $288 | $297 | $306 | $315 | $324 | As Materials & Supplies |
| Infrastructure | *602400* | 15,001 | 15,676 | 16,381 | 17,119 | 17,889 | 18,605 | 19,349 | 20,123 | 20,928 | As Equipment |
| Professional Services | *604100* | 350,000 | 371,000 | 389,550 | 405,132 | 419,312 | 433,988 | 449,177 | 464,898 | 481,170 | As Professional Services |
| Internal Chg - Administrative | *605810* | 162,181 | 167,857 | 173,732 | 179,813 | 186,106 | 192,062 | 198,208 | 204,550 | 211,096 | As Miscellaneous |
| Water | *606800* | 250,000 | 285,169 | 315,254 | 348,513 | 385,282 | 425,929 | 445,181 | 465,303 | 486,335 | Purchased Water Exhibit |
| ***Total Water Supply*** | | **$777,433** | **$839,962** | **$895,187** | **$950,855** | **$1,008,877** | **$1,070,879** | **$1,112,220** | **$1,155,189** | **$1,199,852** | |

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| | | *Budgeted* | *Projected* | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FY 2031 | FY 2032 | FY 2033 | *Notes* |
| ***Water Distribution*** | | | | | | | | | | | |
| Regular Employees | *510100* | $834,148 | $884,197 | $928,407 | $965,543 | $999,337 | $1,034,314 | $1,070,515 | $1,107,983 | $1,146,762 | As Salaries |
| Sick Leave Pay Out | *510112* | 4,000 | 4,240 | 4,452 | 4,630 | 4,792 | 4,960 | 5,133 | 5,313 | 5,499 | As Salaries |
| Vacation Pay Out | *510113* | 2,250 | 2,385 | 2,504 | 2,604 | 2,696 | 2,790 | 2,888 | 2,989 | 3,093 | As Salaries |
| Scheduled Overtime | *510310* | 60,000 | 63,600 | 66,780 | 69,451 | 71,882 | 74,398 | 77,002 | 79,697 | 82,486 | As Salaries |
| Duty Pay | *510330* | 18,000 | 19,080 | 20,034 | 20,835 | 21,565 | 22,319 | 23,101 | 23,909 | 24,746 | As Salaries |
| FICA/MEDICARE Contributions | *520100* | 70,257 | 73,419 | 76,722 | 80,175 | 83,783 | 87,134 | 90,619 | 94,244 | 98,014 | As Benefits |
| Employer's Share | *520210* | 90,297 | 94,360 | 98,607 | 103,044 | 107,681 | 111,988 | 116,468 | 121,126 | 125,971 | As Benefits |
| Employer's UAL Share | *520215* | 131,331 | 137,241 | 143,417 | 149,870 | 156,615 | 162,879 | 169,394 | 176,170 | 183,217 | As Benefits |
| Employee Share Paid by Cty/Pks | *520220* | 55,104 | 57,584 | 60,175 | 62,883 | 65,713 | 68,341 | 71,075 | 73,918 | 76,874 | As Benefits |
| HRAVEBA | *520223* | 27,552 | 28,792 | 30,087 | 31,441 | 32,856 | 34,171 | 35,537 | 36,959 | 38,437 | As Benefits |
| Deferred Comp | *520224* | 7,350 | 7,681 | 8,026 | 8,388 | 8,765 | 9,116 | 9,480 | 9,859 | 10,254 | As Benefits |
| Group Health Insurance | *520300* | 340,550 | 355,875 | 371,889 | 388,624 | 406,112 | 422,357 | 439,251 | 456,821 | 475,094 | As Benefits |
| Worker's Compensation | *520400* | 15,919 | 16,635 | 17,384 | 18,166 | 18,984 | 19,743 | 20,533 | 21,354 | 22,208 | As Benefits |
| Office Supplies | *601100* | 3,000 | 3,105 | 3,214 | 3,326 | 3,443 | 3,546 | 3,652 | 3,762 | 3,875 | As Materials & Supplies |
| Small Tools & Ops Supplies | *601200* | 13,000 | 13,455 | 13,926 | 14,413 | 14,918 | 15,365 | 15,826 | 16,301 | 16,790 | As Materials & Supplies |
| Uniforms - Clothing | *601300* | 4,500 | 4,658 | 4,821 | 4,989 | 5,164 | 5,319 | 5,478 | 5,643 | 5,812 | As Materials & Supplies |
| Technical Supplies | *601400* | 35,000 | 36,225 | 37,493 | 38,805 | 40,163 | 41,368 | 42,609 | 43,888 | 45,204 | As Materials & Supplies |
| Chemicals | *601500* | 5,500 | 5,693 | 5,892 | 6,098 | 6,311 | 6,501 | 6,696 | 6,897 | 7,104 | As Materials & Supplies |
| County Services | *601630* | 5,000 | 5,300 | 5,565 | 5,788 | 5,990 | 6,200 | 6,417 | 6,641 | 6,874 | As Professional Services |
| Books & Periodicals | *601700* | 200 | 207 | 214 | 222 | 230 | 236 | 243 | 251 | 258 | As Materials & Supplies |
| Fuel | *602120* | 30,000 | 31,500 | 33,075 | 34,729 | 36,465 | 37,924 | 39,441 | 41,018 | 42,659 | As Utilities |
| Rental Charges | *602210* | 3,000 | 3,135 | 3,276 | 3,423 | 3,578 | 3,721 | 3,869 | 4,024 | 4,185 | As Equipment |
| Natural Gas | *602331* | 2,400 | 2,520 | 2,646 | 2,778 | 2,917 | 3,034 | 3,155 | 3,281 | 3,413 | As Utilities |
| Electricity | *602332* | 60,000 | 63,000 | 66,150 | 69,458 | 72,930 | 75,848 | 78,881 | 82,037 | 85,318 | As Utilities |
| Water | *602333* | 1,500 | 1,575 | 1,654 | 1,736 | 1,823 | 1,896 | 1,972 | 2,051 | 2,133 | As Utilities |
| Wastewater & Other | *602334* | 130 | 137 | 143 | 150 | 158 | 164 | 171 | 178 | 185 | As Utilities |
| Disposal & Sanitary Service | *602351* | 1,000 | 1,050 | 1,103 | 1,158 | 1,216 | 1,264 | 1,315 | 1,367 | 1,422 | As Utilities |
| Infrastructure | *602400* | 210,000 | 219,450 | 229,325 | 239,645 | 250,429 | 260,446 | 270,864 | 281,698 | 292,966 | As Equipment |
| Communications | *603100* | 8,950 | 9,487 | 9,961 | 10,360 | 10,722 | 11,098 | 11,486 | 11,888 | 12,304 | As Professional Services |
| Computers | *603200* | 3,000 | 3,135 | 3,276 | 3,423 | 3,578 | 3,721 | 3,869 | 4,024 | 4,185 | As Equipment |
| Postage | *603400* | 2,000 | 2,070 | 2,142 | 2,217 | 2,295 | 2,364 | 2,435 | 2,508 | 2,583 | As Materials & Supplies |
| Radios | *603500* | 1,000 | 1,045 | 1,092 | 1,141 | 1,193 | 1,240 | 1,290 | 1,341 | 1,395 | As Equipment |
| Professional Services | *604100* | 53,000 | 56,180 | 58,989 | 61,349 | 63,496 | 65,718 | 68,018 | 70,399 | 72,863 | As Professional Services |
| Bad Debt Expense | *605400* | 50,000 | 51,750 | 53,561 | 55,436 | 57,376 | 59,212 | 61,107 | 63,062 | 65,080 | As Miscellaneous |
| Senior Discount | *605510* | 33,120 | 34,280 | 35,479 | 36,721 | 38,006 | 39,223 | 40,478 | 41,773 | 43,110 | As Miscellaneous |
| Licensing | *605700* | 25,000 | 25,875 | 26,781 | 27,718 | 28,688 | 29,606 | 30,553 | 31,531 | 32,540 | As Miscellaneous |
| Internal Chg - Administrative | *605810* | 919,900 | 952,097 | 985,420 | 1,019,910 | 1,055,606 | 1,089,386 | 1,124,246 | 1,160,222 | 1,197,349 | As Miscellaneous |
| Internal Chg - Insurance Svc | *605811* | 72,109 | 82,925 | 91,218 | 95,779 | 100,568 | 104,590 | 108,774 | 113,125 | 117,650 | As Insurance |
| Internal Chg - Tech Debt | *605812* | 50,000 | 51,750 | 53,561 | 55,436 | 57,376 | 59,212 | 61,107 | 63,062 | 65,080 | As Miscellaneous |
| Internal Chg - Facility Use | *605813* | 115,015 | 120,191 | 125,599 | 131,251 | 137,158 | 142,644 | 148,350 | 154,284 | 160,455 | As Equipment |
| Internal Chg - Fleet Maint | *605814* | 108,178 | 113,046 | 118,133 | 123,449 | 129,004 | 134,164 | 139,531 | 145,112 | 150,917 | As Equipment |
| Internal Chg - Equip Replacmnt | *605815* | 212,727 | 222,300 | 232,303 | 242,757 | 253,681 | 263,828 | 274,381 | 285,357 | 296,771 | As Equipment |
| Air | *606311* | 3,000 | 3,150 | 3,308 | 3,473 | 3,647 | 3,792 | 3,944 | 4,102 | 4,266 | As Utilities |
| Personal Vehicle Mileage | *606313* | 350 | 362 | 375 | 388 | 402 | 414 | 428 | 441 | 456 | As Miscellaneous |
| Lodging | *606320* | 2,500 | 2,588 | 2,678 | 2,772 | 2,869 | 2,961 | 3,055 | 3,153 | 3,254 | As Miscellaneous |
| Meals | *606330* | 350 | 362 | 375 | 388 | 402 | 414 | 428 | 441 | 456 | As Miscellaneous |
| Training | *606400* | 5,000 | 5,175 | 5,356 | 5,544 | 5,738 | 5,921 | 6,111 | 6,306 | 6,508 | As Miscellaneous |
| Dues | *606500* | 2,000 | 2,070 | 2,142 | 2,217 | 2,295 | 2,368 | 2,444 | 2,522 | 2,603 | As Miscellaneous |
| Medical & Laboratory | *606600* | 25,000 | 25,875 | 26,781 | 27,718 | 28,688 | 29,606 | 30,553 | 31,531 | 32,540 | As Miscellaneous |
| Equipment | *703000* | 5,000 | 5,225 | 5,460 | 5,706 | 5,963 | 6,201 | 6,449 | 6,707 | 6,975 | As Equipment |
| ***Total Water Distribution*** | | **$3,728,187** | **$3,907,033** | **$4,080,972** | **$4,247,526** | **$4,415,263** | **$4,575,026** | **$4,740,624** | **$4,912,273** | **$5,090,195** | |

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| | | *Budgeted* | *Projected* | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **FY 2025** | **FY 2026** | **FY 2027** | **FY 2028** | **FY 2029** | **FY 2030** | **FY 2031** | **FY 2032** | **FY 2033** | ***Notes*** |
| ***Water Treatment*** | | | | | | | | | | | |
| Regular Employees | *510100* | $529,569 | $561,343 | $589,410 | $612,987 | $634,441 | $656,647 | $679,629 | $703,416 | $728,036 | As Salaries |
| Sick Leave Pay Out | *510112* | 900 | 954 | 1,002 | 1,042 | 1,078 | 1,116 | 1,155 | 1,195 | 1,237 | As Salaries |
| Vacation Pay Out | *510113* | 500 | 530 | 557 | 579 | 599 | 620 | 642 | 664 | 687 | As Salaries |
| Scheduled Overtime | *510310* | 22,000 | 23,320 | 24,486 | 25,465 | 26,357 | 27,279 | 28,234 | 29,222 | 30,245 | As Salaries |
| Duty Pay | *510330* | 17,700 | 18,762 | 19,700 | 20,488 | 21,205 | 21,947 | 22,716 | 23,511 | 24,333 | As Salaries |
| FICA/MEDICARE Contributions | *520100* | 43,656 | 45,621 | 47,673 | 49,819 | 52,061 | 54,143 | 56,309 | 58,561 | 60,904 | As Benefits |
| Employer's Share | *520210* | 56,754 | 59,308 | 61,977 | 64,766 | 67,680 | 70,387 | 73,203 | 76,131 | 79,176 | As Benefits |
| Employer's UAL Share | *520215* | 81,616 | 85,289 | 89,127 | 93,137 | 97,329 | 101,222 | 105,271 | 109,481 | 113,861 | As Benefits |
| Employee Share Paid by Cty/Pks | *520220* | 34,240 | 35,781 | 37,391 | 39,074 | 40,832 | 42,465 | 44,164 | 45,930 | 47,767 | As Benefits |
| HRAVEBA | *520223* | 17,120 | 17,890 | 18,695 | 19,537 | 20,416 | 21,233 | 22,082 | 22,965 | 23,884 | As Benefits |
| Deferred Comp | *520224* | 3,750 | 3,919 | 4,095 | 4,279 | 4,472 | 4,651 | 4,837 | 5,030 | 5,232 | As Benefits |
| Other Benefits | *520225* | 70 | 73 | 76 | 80 | 83 | 87 | 90 | 94 | 98 | As Benefits |
| Group Health Insurance | *520300* | 173,750 | 199,813 | 219,794 | 230,783 | 242,323 | 252,016 | 262,096 | 272,580 | 283,483 | As Insurance |
| Worker's Compensation | *520400* | 7,246 | 7,681 | 8,065 | 8,387 | 8,681 | 8,985 | 9,299 | 9,625 | 9,962 | As Salaries |
| Office Supplies | *601100* | 2,000 | 2,070 | 2,142 | 2,217 | 2,295 | 2,364 | 2,435 | 2,508 | 2,583 | As Materials & Supplies |
| Small Tools & Ops Supplies | *601200* | 1,600 | 1,656 | 1,714 | 1,774 | 1,836 | 1,891 | 1,948 | 2,006 | 2,066 | As Materials & Supplies |
| Uniforms - Clothing | *601300* | 2,700 | 2,795 | 2,892 | 2,994 | 3,098 | 3,191 | 3,287 | 3,386 | 3,487 | As Materials & Supplies |
| Technical Supplies | *601400* | 50,000 | 51,750 | 53,561 | 55,436 | 57,376 | 59,097 | 60,870 | 62,696 | 64,577 | As Materials & Supplies |
| Chemicals | *601500* | 236,250 | 248,063 | 260,466 | 273,489 | 287,163 | 298,650 | 310,596 | 323,020 | 335,941 | As Utilities |
| Books & Periodicals | *601700* | 150 | 155 | 161 | 166 | 172 | 177 | 183 | 188 | 194 | As Materials & Supplies |
| Fuel | *602120* | 5,500 | 5,775 | 6,064 | 6,367 | 6,685 | 6,953 | 7,231 | 7,520 | 7,821 | As Utilities |
| Building Maintenance | *602220* | 1,500 | 1,590 | 1,670 | 1,736 | 1,797 | 1,860 | 1,925 | 1,992 | 2,062 | As Professional Services |
| Electricity | *602332* | 42,000 | 44,100 | 46,305 | 48,620 | 51,051 | 53,093 | 55,217 | 57,426 | 59,723 | As Utilities |
| Custodial | *602352* | 1,300 | 1,378 | 1,447 | 1,505 | 1,557 | 1,612 | 1,668 | 1,727 | 1,787 | As Professional Services |
| Grounds Care | *602353* | 7,500 | 7,950 | 8,348 | 8,681 | 8,985 | 9,300 | 9,625 | 9,962 | 10,311 | As Professional Services |
| Infrastructure | *602400* | 200,000 | 209,000 | 218,405 | 228,233 | 238,504 | 248,044 | 257,966 | 268,284 | 279,016 | As Equipment |
| Communications | *603100* | 5,000 | 5,300 | 5,565 | 5,788 | 5,990 | 6,200 | 6,417 | 6,641 | 6,874 | As Professional Services |
| Computers | *603200* | 1,000 | 1,045 | 1,092 | 1,141 | 1,193 | 1,240 | 1,290 | 1,341 | 1,395 | As Equipment |
| Postage | *603400* | 600 | 621 | 643 | 665 | 689 | 709 | 730 | 752 | 775 | As Materials & Supplies |
| Radios | *603500* | 100 | 105 | 109 | 114 | 119 | 124 | 129 | 134 | 140 | As Equipment |
| Professional Services | *604100* | 15,000 | 15,900 | 16,695 | 17,363 | 17,970 | 18,599 | 19,250 | 19,924 | 20,622 | As Professional Services |
| Licensing | *605700* | 10,500 | 10,868 | 11,248 | 11,642 | 12,049 | 12,435 | 12,832 | 13,243 | 13,667 | As Miscellaneous |
| Internal Chg - Administrative | *605810* | 207,259 | 214,513 | 222,021 | 229,792 | 237,834 | 245,445 | 253,299 | 261,405 | 269,770 | As Miscellaneous |
| Internal Chg - Insurance Svc | *605811* | 33,562 | 38,596 | 42,456 | 44,579 | 46,808 | 48,680 | 50,627 | 52,652 | 54,758 | As Insurance |
| Internal Chg - Tech Debt | *605812* | 28,200 | 29,187 | 30,209 | 31,266 | 32,360 | 33,396 | 34,464 | 35,567 | 36,705 | As Miscellaneous |
| Internal Chg - Facility Use | *605813* | 32,238 | 33,689 | 35,205 | 36,789 | 38,444 | 39,982 | 41,581 | 43,245 | 44,975 | As Equipment |
| Internal Chg - Fleet Maint | *605814* | 8,272 | 8,644 | 9,033 | 9,440 | 9,865 | 10,259 | 10,669 | 11,096 | 11,540 | As Equipment |
| Internal Chg - Equip Replacmnt | *605815* | 19,704 | 20,591 | 21,517 | 22,486 | 23,497 | 24,437 | 25,415 | 26,431 | 27,489 | As Equipment |
| Personal Vehicle Mileage | *606313* | 600 | 621 | 643 | 665 | 689 | 711 | 733 | 757 | 781 | As Miscellaneous |
| Lodging | *606320* | 2,500 | 2,588 | 2,678 | 2,772 | 2,869 | 2,961 | 3,055 | 3,153 | 3,254 | As Miscellaneous |
| Meals | *606330* | 1,000 | 1,035 | 1,071 | 1,109 | 1,148 | 1,184 | 1,222 | 1,261 | 1,302 | As Miscellaneous |
| Training | *606400* | 3,000 | 3,105 | 3,214 | 3,326 | 3,443 | 3,553 | 3,666 | 3,784 | 3,905 | As Miscellaneous |
| Dues | *606500* | 1,000 | 1,035 | 1,071 | 1,109 | 1,148 | 1,184 | 1,222 | 1,261 | 1,302 | As Miscellaneous |
| Medical & Laboratory | *606600* | 20,000 | 20,700 | 21,425 | 22,174 | 22,950 | 23,685 | 24,443 | 25,225 | 26,032 | As Miscellaneous |
| Equipment | *703000* | 2,000 | 2,090 | 2,184 | 2,282 | 2,385 | 2,480 | 2,580 | 2,683 | 2,790 | As Equipment |
| ***Total Water Treatment*** | | **$1,930,906** | **$2,046,795** | **$2,153,300** | **$2,246,142** | **$2,339,527** | **$2,426,294** | **$2,516,304** | **$2,609,679** | **$2,706,546** | |

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| | | *Budgeted* | *Projected* | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **FY 2025** | **FY 2026** | **FY 2027** | **FY 2028** | **FY 2029** | **FY 2030** | **FY 2031** | **FY 2032** | **FY 2033** | ***Notes*** |
| ***Additional Staffing*** | | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | As Salaries |
| **Total Operations & Maintenance** | | **$6,732,009** | **$7,105,656** | **$7,456,327** | **$7,784,382** | **$8,116,597** | **$8,437,503** | **$8,747,263** | **$9,068,520** | **$9,401,706** | 3.71% |
| | | *1.6%* | *5.6%* | *4.9%* | *4.4%* | *4.3%* | *4.0%* | *3.7%* | *3.7%* | *3.7%* | |
| **Taxes & Transfers** | | | | | | | | | | | |
| Franchise Tax | *612100* | $720,000 | $694,955 | $698,430 | $701,922 | $705,432 | $708,959 | $712,504 | $716,066 | $719,647 | 8.0% Of Rate Revenues |
| Ashland Forest Resiliency - General Fund | *902110* | 50,000 | 51,750 | 53,561 | 55,436 | 57,376 | 59,212 | 61,107 | 63,062 | 65,080 | As Miscellaneous |
| Contingency | *905000* | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Miscellaneous |
| ***Total Taxes & Transfers*** | | **$770,000** | **$746,705** | **$751,991** | **$757,358** | **$762,808** | **$768,171** | **$773,611** | **$779,129** | **$784,727** | |
| **Rate Funded Capital** | | **$825,000** | **$2,000,000** | **$2,400,000** | **$1,625,000** | **$2,300,000** | **$3,550,000** | **$3,800,000** | **$4,100,000** | **$4,400,000** | $707,763 FY 2023 Dep. Exp. |
| **Debt Service** | | | | | | | | | | | |
| 2013 New Construction Debt - Water | | $195,463 | $196,469 | $197,131 | $197,438 | $0 | $0 | $0 | $0 | $0 | Exhibit 5 |
| IFA DEQ S14005 | | 136,207 | 136,207 | 136,207 | 136,207 | 136,207 | 136,207 | 136,207 | 136,207 | 136,207 | Exhibit 5 |
| WTP S16021 | | 394,098 | 394,099 | 394,098 | 394,099 | 394,099 | 394,098 | 394,099 | 394,099 | 394,099 | Exhibit 5 |
| WIFIA Loan | | 0 | 0 | 141,900 | 2,008,963 | 2,806,374 | 3,127,394 | 3,127,394 | 3,127,394 | 3,127,394 | Exhibit 5 |
| Dam Safety Improvements | | 0 | 332,800 | 677,200 | 677,200 | 677,200 | 677,200 | 677,200 | 677,200 | 677,200 | Exhibit 5 |
| Medford Water Commission Loan | | 163,756 | 163,756 | 163,756 | 163,756 | 163,756 | 163,756 | 163,756 | 163,756 | 163,756 | Exhibit 5 |
| Additional Long-Term Debt | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | Calculated @ 5.5% for 20 yrs |
| ***Total Debt Service*** | | **$889,523** | **$1,223,331** | **$1,710,292** | **$3,577,662** | **$4,177,636** | **$4,498,655** | **$4,498,656** | **$4,498,656** | **$4,498,655** | |
| *LESS: SDC Revenue* | | $163,756 | $163,756 | $163,756 | $163,756 | $163,756 | $163,756 | $163,756 | $163,756 | $163,756 | Pay MWC Loan |
| *LESS: SDC Revenue - WTP* | | 0 | 772,966 | 772,966 | 772,966 | 772,966 | 772,966 | 772,966 | 772,966 | 772,966 | |
| ***Net Debt Service*** | | **$725,768** | **$286,609** | **$773,571** | **$2,640,941** | **$3,240,915** | **$3,561,934** | **$3,561,935** | **$3,561,934** | **$3,561,934** | |
| **Reserve Funding** | | | | | | | | | | | |
| Unrestricted Reserves | | $10,072 | $14,925 | $19,907 | $11,788 | $28,364 | $18,047 | $53,221 | $78,460 | $143,471 | |
| WTP Sinking Fund | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| SDCs Reserve | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| ***Total Reserve Funding*** | | **$10,072** | **$14,925** | **$19,907** | **$11,788** | **$28,364** | **$18,047** | **$53,221** | **$78,460** | **$143,471** | |
| **Total Revenue Requirement** | | **$9,062,849** | **$10,153,895** | **$11,401,796** | **$12,819,469** | **$14,448,683** | **$16,335,655** | **$16,936,030** | **$17,588,043** | **$18,291,838** | |
| Bal. / (Def.) of Funds | | $0 | ($1,085,867) | ($2,329,919) | ($3,754,433) | ($5,384,825) | ($7,250,084) | ($7,829,986) | ($8,434,628) | ($9,065,013) | |
| Additional Franchise Tax | | 0 | (86,869) | (186,393) | (300,355) | (430,786) | (580,007) | (626,399) | (674,770) | (725,201) | As Franchise Tax |
| Total Bal. / (Def.) of Funds | | $0 | ($1,172,737) | ($2,516,312) | ($4,054,788) | ($5,815,611) | ($7,830,090) | ($8,456,385) | ($9,109,399) | ($9,790,214) | |
| Balance a % of Rate Adj. Req'd | | 0.0% | 13.5% | 28.8% | 46.2% | 66.0% | 88.4% | 94.9% | 101.8% | 108.8% | |
| **Proposed Rate Adjustment** | | **0.0%** | **13.5%** | **13.5%** | **13.5%** | **13.5%** | **13.5%** | **3.5%** | **3.5%** | **3.5%** | |
| Months of Adjustment | | **12** | **12** | **12** | **12** | **12** | **12** | **12** | **12** | **12** | |
| Add'l Revenue with Rate Adj. | | $0 | $1,172,737 | $2,516,312 | $4,054,788 | $5,815,611 | $7,830,090 | $8,456,385 | $9,109,399 | $9,790,214 | |
| Bal. / (Def.) After Rate Adj. | | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | |
| **Add'l Rate Adj. Req'd** | | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | **0.0%** | |

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| | *Budgeted* | *Projected* | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | **FY 2025** | **FY 2026** | **FY 2027** | **FY 2028** | **FY 2029** | **FY 2030** | **FY 2031** | **FY 2032** | **FY 2033** | ***Notes*** |
| **Residential Customer Bill @ 700 CF** | *(Current rates; Customer Charge + Meter Charge (0.75") + 700 CF)* | | | | | | | | | |
| Customer Bill on Proposed Adjustment | $51.27 | $58.19 | $66.05 | $74.96 | $85.08 | $96.57 | $99.95 | $103.45 | $107.07 | |
| Bill Difference - Monthly | 0.00 | 6.92 | 7.86 | 8.92 | 10.12 | 11.49 | 3.38 | 3.50 | 3.62 | |
| Cumulative Bill Difference | 0.00 | 6.92 | 14.78 | 23.69 | 33.81 | 45.30 | 48.68 | 52.18 | 55.80 | |
| **Debt Service Coverage Ratio (all debt)** | | | | | | | | | | |
| Before Rate Adjustment | 2.62 | 1.60 | 0.94 | 0.36 | 0.23 | 0.14 | 0.08 | 0.02 | 0.00 | |
| After Proposed Rate Adjustment | 2.62 | 2.56 | 2.42 | 1.49 | 1.62 | 1.88 | 1.96 | 2.04 | 2.14 | |
| **Reserve Funds** | | | | | | | | | | |
| **Total Beginning Cash Reserves** | **$12,291,078** | **$11,959,205** | **$50,037,660** | **$9,683,492** | **$5,888,097** | **$5,094,836** | **$4,050,632** | **$3,140,281** | **$4,229,986** | |
| ***Unrestricted Reserves*** | | | | | | | | | | |
| **Beginning Balance** | **$11,108,040** | **$10,776,923** | **$9,780,893** | **$8,540,987** | **$5,672,082** | **$4,867,576** | **$3,812,128** | **$2,890,532** | **$3,968,993** | |
| Plus: Additions | 10,072 | 14,925 | 19,907 | 11,788 | 28,364 | 18,047 | 53,221 | 1,078,460 | 1,143,471 | |
| Less: Uses of Funds | (341,190) | (1,010,955) | (1,259,813) | (2,880,693) | (832,870) | (1,073,495) | (974,817) | 0 | 0 | |
| **Ending Balance** | **$10,776,923** | **$9,780,893** | **$8,540,987** | **$5,672,082** | **$4,867,576** | **$3,812,128** | **$2,890,532** | **$3,968,993** | **$5,112,464** | |
| *Target: 25% of O&M* | *$1,683,002* | *$1,776,414* | *$1,864,082* | *$1,946,095* | *$2,029,149* | *$2,109,376* | *$2,186,816* | *$2,267,130* | *$2,350,426* | |
| *Contingency Target: 3% of O&M* | *201,960* | *213,170* | *223,690* | *233,531* | *243,498* | *253,125* | *262,418* | *272,056* | *282,051* | |
| *Target: Future CIP Reserve* | *0* | *0* | *0* | *0* | *0* | *0* | *0* | *0* | *0* | |
| *Total Target* | *$1,884,963* | *$1,989,584* | *$2,087,771* | *$2,179,627* | *$2,272,647* | *$2,362,501* | *$2,449,234* | *$2,539,186* | *$2,632,478* | |
| ***SDCs Reserve*** | | | | | | | | | | |
| **Beginning Balance** | **$1,183,037** | **$1,182,282** | **$193,526** | **$204,771** | **$216,015** | **$227,260** | **$238,504** | **$249,749** | **$260,993** | |
| Plus: Additions | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Improvement SDC | 175,000 | 175,000 | 175,000 | 175,000 | 175,000 | 175,000 | 175,000 | 175,000 | 175,000 | |
| Treatment Plant Related Increase | 0 | 772,966 | 772,966 | 772,966 | 772,966 | 772,966 | 772,966 | 772,966 | 772,966 | |
| Less: Capital Project Funding | (175,756) | (1,936,721) | (936,721) | (936,721) | (936,721) | (936,721) | (936,721) | (936,721) | (936,721) | |
| **Ending Balance** | **$1,182,282** | **$193,526** | **$204,771** | **$216,015** | **$227,260** | **$238,504** | **$249,749** | **$260,993** | **$272,238** | |
| ***Long-Term Debt Proceeds*** | | | | | | | | | | |
| **Beginning Balance** | **$0** | **$0** | **$40,063,241** | **$937,734** | **$0** | **$0** | **$0** | **$0** | **$0** | |
| Plus: Additions - WIFIA Proceeds | 0 | 60,319,749 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Plus: Additions - Dam Safety Proceeds / WTP Admin | 0 | 13,876,800 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Less: Capital Project Funding | 0 | (34,133,308) | (39,125,507) | (937,734) | 0 | 0 | 0 | 0 | 0 | |
| **Ending Balance** | **$0** | **$40,063,241** | **$937,734** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | |
| ***WTP Sinking Fund*** | | | | | | | | | | |
| **Beginning Balance** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | |
| Plus: Additions | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Less: Capital Project Funding | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| **Ending Balance** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | |
| **Total Ending Cash Reserves** *(excluding proceeds)* | **$11,959,205** | **$9,974,419** | **$8,745,758** | **$5,888,097** | **$5,094,836** | **$4,050,632** | **$3,140,281** | **$4,229,986** | **$5,384,701** | |

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**City of Ashland**
**Water Rate Study**
**Purchased Water Projection**

| | FY 2024 | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FY 2031 | FY 2032 | FY 2033 | *Notes* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Purchased Water** | | | | | | | | | | | |
| Purchased Water Costs | $250,000 | $250,000 | $285,169 | $315,254 | $348,513 | $385,282 | $425,929 | $445,181 | $465,303 | $486,335 | As Purchased Water |

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**City of Ashland**
**Water Rate Study**
**Capital Improvement Plan**
**Exhibit 4**



| | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FY 2031 | FY 2032 | FY 2033 | Total | *Notes* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Water - Supply Improvements** | | | | | | | | | | | |
| Dam Safety Improvements | $0 | $3,312,804 | $3,312,804 | $0 | $0 | $0 | $0 | $0 | $0 | $6,625,608 | |
| East & West Fork Transmission Line Rehabilitation | 0 | 1,588,434 | 1,651,972 | 0 | 0 | 0 | 0 | 0 | 0 | 3,240,406 | |
| 7.0 MGD Water Treatment Plant | 0 | 39,620,894 | 30,917,676 | 655,039 | 0 | 0 | 0 | 0 | 0 | 71,193,609 | |
| 7.0 MGD Water Treatment Plant Construction Administration | 0 | 512,357 | 4,895,027 | 1,639,617 | 0 | 0 | 0 | 0 | 0 | 7,047,001 | |
| Reeder Reservoir Sediment Removal | 0 | 173,888 | 0 | 0 | 195,600 | 0 | 0 | 0 | 0 | 369,488 | |
| Granite Storage Tank Replacement | 0 | 0 | 0 | 0 | 0 | 1,771,406 | 1,833,405 | 0 | 0 | 3,604,811 | |
| ***Total Water - Supply Improvements*** | **$0** | **$45,208,377** | **$40,777,479** | **$2,294,656** | **$195,600** | **$1,771,406** | **$1,833,405** | **$0** | **$0** | **$92,080,923** | |
| **Water - Pump Station Improvements** | | | | | | | | | | | |
| TAP BPS Backup Power | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $417,000 | |
| Hillview BPS Replacement | 0 | 407,550 | 1,271,556 | 0 | 0 | 0 | 0 | 0 | 0 | 1,679,106 | |
| Granite to Crowson Booster Station | 0 | 0 | 0 | 0 | 0 | 1,138,761 | 1,178,617 | 0 | 0 | 2,317,378 | |
| ***Total Water - Pump Station Improvements*** | **$0** | **$407,550** | **$1,271,556** | **$0** | **$0** | **$1,138,761** | **$1,178,617** | **$0** | **$0** | **$4,413,484** | |
| **Water - Pipe Improvements** | | | | | | | | | | | |
| Annual Pipe Replacement | $300,000 | $300,000 | $300,000 | $300,000 | $300,000 | $300,000 | $300,000 | $300,000 | $300,000 | $3,000,000 | |
| Distribution Pipe Projects | 608,190 | 1,541,082 | 351,515 | 1,629,219 | 684,601 | 1,413,329 | 1,462,795 | 0 | 0 | 8,350,731 | |
| Transmission Pipe Projects | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| ***Total Water - Pipe Improvements*** | **$908,190** | **$1,841,082** | **$651,515** | **$1,929,219** | **$984,601** | **$1,713,329** | **$1,762,795** | **$300,000** | **$300,000** | **$11,350,731** | |
| **Water - Operations & Maintenance** | | | | | | | | | | | |
| Telemetry Upgrades | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $80,000 | |
| Tolman Creek Road PRV Station | 0 | 0 | 84,770 | 0 | 0 | 0 | 0 | 0 | 0 | 84,770 | |
| ***Total Water - Operations & Maintenance*** | **$0** | **$0** | **$84,770** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$164,770** | |
| **TAP - Supply Improvements** | | | | | | | | | | | |
| Non-Peak/Emergency Supply Connect Ashland to Talent/Phoenix | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $236,000 | |
| N Phoenix Road Pipe Improvements | 0 | 0 | 0 | 1,088,376 | 1,131,911 | 0 | 0 | 0 | 0 | 2,220,287 | |
| N Phoenix Road Master Meter Connection | 0 | 0 | 0 | 131,176 | 0 | 0 | 0 | 0 | 0 | 131,176 | |
| ***Total TAP - Supply Improvements*** | **$0** | **$0** | **$0** | **$1,219,552** | **$1,131,911** | **$0** | **$0** | **$0** | **$0** | **$2,587,463** | |

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| | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FY 2031 | FY 2032 | FY 2033 | Total | *Notes* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **TAP - Booster Pump Station Improvements** | | | | | | | | | | | |
| Regional BPS Short-Term Expansion | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $211,000 | |
| Regional BPS Programming Updates | 105,545 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 105,545 | |
| Talent BPS Generator Upgrade (Option 1) | 465,025 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 465,025 | |
| Talent BPS Expansion for Talent and Ashland (Option 1) | 144,210 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 144,210 | |
| Talent BPS Seismic Upgrades | 104,500 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 104,500 | |
| ***Total TAP - Booster Pump Station Improvements*** | **$819,280** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$1,030,280** | |
| **TAP - Pipe Improvements** | | | | | | | | | | | |
| 24-inch Pipe Seismic Upgrades (Highway 99 Phoenix) | $1,696,035 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $1,696,035 | |
| Talent to Ashland Pipe Improvements (Option 1) | 0 | 0 | 0 | 0 | 820,757 | 0 | 0 | 0 | 0 | 820,757 | |
| ***Total TAP - Pipe Improvements*** | **$1,696,035** | **$0** | **$0** | **$0** | **$820,757** | **$0** | **$0** | **$0** | **$0** | **$2,516,792** | |
| **Capital Outlay** | $270,000 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | **$546,000** | |
| Unidentified Future Capital Projects | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $2,800,000 | $3,100,000 | **$5,900,000** | |
| Transfer to Unrestricted Reserve | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $1,000,000 | $1,000,000 | **$2,000,000** | |
| **Total Capital Improvement Projects** | **$3,693,505** | **$47,457,010** | **$42,785,320** | **$5,443,427** | **$3,132,870** | **$4,623,495** | **$4,774,817** | **$4,100,000** | **$4,400,000** | **$122,590,444** | |
| ***Less: Other Funding Sources*** | | | | | | | | | | | |
| Unrestricted Reserves | $341,190 | $1,010,955 | $1,259,813 | $2,880,693 | $832,870 | $1,073,495 | $974,817 | $0 | $0 | $9,616,833 | |
| SDCs Reserve | 12,000 | 1,000,000 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,024,000 | |
| WTP Sinking Fund | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| ARPA Grant - TAP | 2,515,315 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2,515,315 | |
| Grant Proceeds | 0 | 9,312,747 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 9,312,747 | |
| Long-Term Debt Proceeds | 0 | 34,133,308 | 39,125,507 | 937,734 | 0 | 0 | 0 | 0 | 0 | 74,196,549 | |
| Additional Revenue Bonds | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| **Total Other Funding Sources** | **$2,868,505** | **$45,457,010** | **$40,385,320** | **$3,818,427** | **$832,870** | **$1,073,495** | **$974,817** | **$0** | **$0** | **$96,665,444** | |
| **Rate Funded Capital** | **$825,000** | **$2,000,000** | **$2,400,000** | **$1,625,000** | **$2,300,000** | **$3,550,000** | **$3,800,000** | **$4,100,000** | **$4,400,000** | **$25,925,000** | |

[1] - All capital is assumed to be in FY 2024 $'s; future projects are escalated at the inflation rate

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**City of Ashland**
**Water Rate Study**
**Debt Schedule**
**Exhibit 5**

| Year | 2013 New Construction Debt - Water | | | IFA DEQ S14005 | | | WIFIA Loan | | | WTP S16021 | Dam Safety Improvements | Medford Water Commission Loan | *Total Annual Debt Service (P&I)* |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | *Principal* | *Interest* | *Total* | *Principal* | *Interest* | *Total* | *Principal* | *Interest* | *Total* | *Total* | *Total* | *Total* | |
| FY 2024 | $175,000 | $19,125 | $194,125 | $104,678 | $31,529 | $136,207 | $0 | $0 | $0 | $394,098 | $0 | $163,756 | **$888,186** |
| FY 2025 | 180,000 | 15,463 | 195,463 | 105,725 | 30,482 | 136,207 | 0 | 0 | 0 | 394,098 | 0 | 163,756 | **889,523** |
| FY 2026 | 185,000 | 11,469 | 196,469 | 106,782 | 29,425 | 136,207 | 0 | 0 | 0 | 394,099 | 332,800 | 163,756 | **1,223,331** |
| FY 2027 | 190,000 | 7,131 | 197,131 | 107,850 | 28,357 | 136,207 | 0 | 141,900 | 141,900 | 394,098 | 677,200 | 163,756 | **1,710,292** |
| FY 2028 | 195,000 | 2,438 | 197,438 | 108,929 | 27,279 | 136,207 | 0 | 2,008,963 | 2,008,963 | 394,099 | 677,200 | 163,756 | **3,577,662** |
| FY 2029 | 0 | 0 | 0 | 110,018 | 26,189 | 136,207 | 0 | 2,806,374 | 2,806,374 | 394,099 | 677,200 | 163,756 | **4,177,636** |
| FY 2030 | 0 | 0 | 0 | 111,118 | 25,089 | 136,207 | 277,513 | 2,849,881 | 3,127,394 | 394,098 | 677,200 | 163,756 | **4,498,655** |
| FY 2031 | 0 | 0 | 0 | 112,229 | 23,978 | 136,207 | 290,795 | 2,836,599 | 3,127,394 | 394,099 | 677,200 | 163,756 | **4,498,656** |
| FY 2032 | 0 | 0 | 0 | 113,352 | 22,856 | 136,207 | 304,712 | 2,822,682 | 3,127,394 | 394,099 | 677,200 | 163,756 | **4,498,656** |
| FY 2033 | 0 | 0 | 0 | 114,485 | 21,722 | 136,207 | 319,295 | 2,808,099 | 3,127,394 | 394,099 | 677,200 | 163,756 | **4,498,655** |
| FY 2034 | 0 | 0 | 0 | 115,630 | 20,577 | 136,207 | 252,597 | 2,793,776 | 3,046,373 | 0 | 677,200 | 163,756 | **4,023,536** |
| FY 2035 | 0 | 0 | 0 | 116,786 | 19,421 | 136,207 | 827,525 | 2,775,109 | 3,602,634 | 0 | 677,200 | 81,878 | **4,497,919** |
| FY 2036 | 0 | 0 | 0 | 117,954 | 18,253 | 136,207 | 949,976 | 2,734,536 | 3,684,512 | 0 | 677,200 | 0 | **4,497,919** |
| FY 2037 | 0 | 0 | 0 | 119,134 | 17,074 | 136,207 | 995,442 | 2,689,070 | 3,684,512 | 0 | 677,200 | 0 | **4,497,920** |
| FY 2038 | 0 | 0 | 0 | 120,325 | 15,882 | 136,207 | 1,043,083 | 2,641,429 | 3,684,512 | 0 | 677,200 | 0 | **4,497,920** |
| FY 2039 | 0 | 0 | 0 | 121,528 | 14,679 | 136,207 | 1,093,004 | 2,591,508 | 3,684,512 | 0 | 677,200 | 0 | **4,497,919** |
| FY 2040 | 0 | 0 | 0 | 122,744 | 13,464 | 136,207 | 1,145,315 | 2,539,198 | 3,684,513 | 0 | 677,200 | 0 | **4,497,920** |
| FY 2041 | 0 | 0 | 0 | 123,971 | 12,236 | 136,207 | 1,200,129 | 2,484,384 | 3,684,513 | 0 | 677,200 | 0 | **4,497,920** |
| FY 2042 | 0 | 0 | 0 | 125,211 | 10,997 | 136,207 | 1,257,567 | 2,426,946 | 3,684,513 | 0 | 677,200 | 0 | **4,497,921** |
| FY 2043 | 0 | 0 | 0 | 126,463 | 9,744 | 136,207 | 1,317,752 | 2,366,760 | 3,684,512 | 0 | 677,200 | 0 | **4,497,919** |
| FY 2044 | 0 | 0 | 0 | 127,728 | 8,480 | 136,207 | 1,380,819 | 2,303,693 | 3,684,512 | 0 | 677,200 | 0 | **4,497,920** |
| FY 2045 | 0 | 0 | 0 | 129,005 | 7,203 | 136,207 | 1,446,904 | 2,237,608 | 3,684,512 | 0 | 677,200 | 0 | **4,497,920** |
| FY 2046 | 0 | 0 | 0 | 130,295 | 5,912 | 136,207 | 1,516,152 | 2,168,360 | 3,684,512 | 0 | 677,200 | 0 | **4,497,920** |
| FY 2047 | 0 | 0 | 0 | 131,598 | 4,610 | 136,207 | 1,588,713 | 2,095,798 | 3,684,511 | 0 | 0 | 0 | **3,820,719** |
| FY 2048 | 0 | 0 | 0 | 132,914 | 3,294 | 136,207 | 1,664,749 | 2,019,764 | 3,684,513 | 0 | 0 | 0 | **3,820,720** |
| FY 2049 | 0 | 0 | 0 | 196,441 | 1,964 | 198,405 | 1,681,489 | 1,940,825 | 3,622,314 | 0 | 0 | 0 | **3,820,719** |
| FY 2050 | 0 | 0 | 0 | 0 | 0 | 0 | 1,962,716 | 1,858,004 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2051 | 0 | 0 | 0 | 0 | 0 | 0 | 2,056,650 | 1,764,070 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2052 | 0 | 0 | 0 | 0 | 0 | 0 | 2,155,080 | 1,665,640 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2053 | 0 | 0 | 0 | 0 | 0 | 0 | 2,258,220 | 1,562,499 | 3,820,719 | 0 | 0 | 0 | **3,820,719** |
| FY 2054 | 0 | 0 | 0 | 0 | 0 | 0 | 2,366,297 | 1,454,423 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2055 | 0 | 0 | 0 | 0 | 0 | 0 | 2,479,546 | 1,341,173 | 3,820,719 | 0 | 0 | 0 | **3,820,719** |
| FY 2056 | 0 | 0 | 0 | 0 | 0 | 0 | 2,598,216 | 1,222,504 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2057 | 0 | 0 | 0 | 0 | 0 | 0 | 2,722,564 | 1,098,155 | 3,820,719 | 0 | 0 | 0 | **3,820,719** |
| FY 2058 | 0 | 0 | 0 | 0 | 0 | 0 | 2,852,865 | 967,855 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2059 | 0 | 0 | 0 | 0 | 0 | 0 | 2,989,401 | 831,319 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2060 | 0 | 0 | 0 | 0 | 0 | 0 | 3,132,472 | 688,248 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2061 | 0 | 0 | 0 | 0 | 0 | 0 | 3,282,390 | 538,330 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2062 | 0 | 0 | 0 | 0 | 0 | 0 | 3,439,483 | 381,237 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2063 | 0 | 0 | 0 | 0 | 0 | 0 | 3,604,094 | 216,626 | 3,820,720 | 0 | 0 | 0 | **3,820,720** |
| FY 2064 | 0 | 0 | 0 | 0 | 0 | 0 | 1,866,224 | 44,136 | 1,910,360 | 0 | 0 | 0 | **1,910,360** |
| ***Total Debt Service*** | **$925,000** | **$55,625** | **$980,625** | **$3,152,894** | **$450,695** | **$3,603,589** | **$60,319,749** | **$70,717,482** | **$131,037,231** | **$3,940,984** | **$13,876,800** | **$1,883,189** | **$155,322,418** |

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| *Effective 7.1.19* | | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 | Nov-23 | Dec-23 | Jan-24 | Feb-24 | Mar-24 | Apr-24 | May-24 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Residential** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 7,424 | 7,413 | 7,423 | 7,410 | 7,397 | 7,408 | 7,389 | 7,388 | 7,378 | 7,389 | 7,397 | 7,403 | 7,402 |
| | | **7,424** | **7,413** | **7,423** | **7,410** | **7,397** | **7,408** | **7,389** | **7,388** | **7,378** | **7,389** | **7,397** | **7,403** | **7,402** |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 7,092 | 7,077 | 7,088 | 7,076 | 7,063 | 7,072 | 7,053 | 7,052 | 7,043 | 7,057 | 7,064 | 7,068 | 7,067 |
| 1" | 16.29 | 316 | 320 | 319 | 318 | 318 | 320 | 320 | 320 | 319 | 316 | 316 | 319 | 318 |
| 1.5" | 74.52 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 13 | 12 | 12 |
| 2" | 118.41 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 3" | 237.45 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4" | 376.59 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **7,424** | **7,413** | **7,423** | **7,410** | **7,397** | **7,408** | **7,389** | **7,388** | **7,378** | **7,389** | **7,397** | **7,403** | **7,402** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| 0 - 300 | $0.0280 | 0 | 0 | 0 | 0 | 1,924,212 | 1,849,618 | 1,725,661 | 1,686,573 | 1,601,968 | 1,704,252 | 1,713,644 | 1,836,797 | 14,042,725 |
| 301 - 1,000 | 0.0348 | 0 | 0 | 0 | 0 | 2,368,042 | 1,591,123 | 1,007,591 | 927,672 | 689,416 | 909,642 | 969,110 | 1,598,957 | 10,061,553 |
| 1,001 - 2,500 | 0.0472 | 0 | 0 | 0 | 0 | 1,400,697 | 533,847 | 230,720 | 163,758 | 94,314 | 140,748 | 186,127 | 507,177 | 3,257,388 |
| Over 2,500 | 0.0609 | 0 | 0 | 0 | 0 | 1,515,105 | 171,925 | 110,325 | 51,660 | 38,248 | 63,209 | 279,691 | 125,512 | 2,355,675 |
| ***June - September*** | | | | | | | | | | | | | | |
| 0 - 300 | $0.0280 | 1,968,598 | 1,974,693 | 1,974,520 | 1,977,521 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7,895,332 |
| 301 - 1,000 | 0.0348 | 2,676,017 | 2,942,129 | 3,031,146 | 2,992,512 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 11,641,804 |
| 1,001 - 2,500 | 0.0472 | 1,765,574 | 2,452,883 | 2,908,167 | 2,678,744 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 9,805,368 |
| 2,501 - 3,600 | 0.0609 | 347,424 | 555,365 | 753,964 | 661,572 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2,318,325 |
| Over 3,600 | 0.0784 | 379,543 | 489,432 | 817,496 | 678,936 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2,365,407 |
| | | **7,137,156** | **8,414,502** | **9,485,293** | **8,989,285** | **7,208,056** | **4,146,513** | **3,074,297** | **2,829,663** | **2,423,946** | **2,817,851** | **3,148,572** | **4,068,443** | **63,743,577** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $98,962 | $98,815 | $98,949 | $98,775 | $98,602 | $98,749 | $98,495 | $98,482 | $98,349 | $98,495 | $98,602 | $98,682 | $1,183,957 |
| Meter Charge | | 117,293 | 117,123 | 117,279 | 117,075 | 116,872 | 117,045 | 116,749 | 116,733 | 116,576 | 116,746 | 116,930 | 116,967 | 1,403,387 |
| Quantity Charge | | 282,496 | 345,647 | 408,044 | 379,465 | 294,669 | 142,828 | 100,991 | 90,383 | 75,628 | 89,867 | 107,525 | 138,656 | 2,456,199 |
| ***Total Residential Revenues*** | | **$498,750** | **$561,585** | **$624,272** | **$595,316** | **$510,143** | **$358,622** | **$316,235** | **$305,597** | **$290,552** | **$305,109** | **$323,057** | **$354,305** | **$5,043,544** |

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| *Effective 7.1.19* | | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 | Nov-23 | Dec-23 | Jan-24 | Feb-24 | Mar-24 | Apr-24 | May-24 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Residential Irrigation** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 44 | 46 | 43 | 43 | 45 | 42 | 39 | 38 | 38 | 38 | 37 | 41 | 41 |
| | | **44** | **46** | **43** | **43** | **45** | **42** | **39** | **38** | **38** | **38** | **37** | **41** | **41** |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 50 | 53 | 50 | 49 | 51 | 48 | 46 | 45 | 45 | 45 | 44 | 47 | 48 |
| 1" | 16.29 | 18 | 17 | 17 | 18 | 18 | 18 | 17 | 17 | 17 | 17 | 17 | 18 | 17 |
| 1.5" | 74.52 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| 2" | 118.41 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3" | 237.45 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4" | 376.59 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **71** | **73** | **70** | **70** | **72** | **69** | **66** | **65** | **65** | **65** | **64** | **68** | **68** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| 0 - 1,000 | $0.0348 | 0 | 0 | 0 | 0 | 44,461 | 23,370 | 6,063 | 5,955 | 3,559 | 4,211 | 7,027 | 19,312 | 113,958 |
| 1,001 - 2,500 | 0.0472 | 0 | 0 | 0 | 0 | 40,801 | 11,824 | 1,034 | 2,340 | 2,538 | 1,800 | 2,512 | 10,303 | 73,152 |
| Over 2,500 | 0.0609 | 0 | 0 | 0 | 0 | 48,246 | 6,065 | 0 | 24,500 | 745 | 768 | 0 | 7,425 | 87,749 |
| ***June - September*** | | | | | | | | | | | | | | |
| 0 - 1,000 | $0.0348 | 42,114 | 47,143 | 50,302 | 51,448 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 191,007 |
| 1,001 - 2,500 | 0.0472 | 32,295 | 40,786 | 49,863 | 54,653 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 177,597 |
| 2,501 - 3,600 | 0.0609 | 16,790 | 19,378 | 22,561 | 23,377 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 82,106 |
| Over 3,600 | 0.0784 | 73,343 | 98,614 | 166,528 | 111,618 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 450,103 |
| | | **164,542** | **205,921** | **289,254** | **241,096** | **133,508** | **41,259** | **7,097** | **32,795** | **6,842** | **6,779** | **9,539** | **37,040** | **1,175,672** |
| **Revenues** | | | | | | | | | | | | | | |
| Customer Charge | | $587 | $613 | $573 | $573 | $600 | $560 | $520 | $507 | $507 | $507 | $493 | $547 | $6,585 |
| Meter Charge | | 1,298 | 1,328 | 1,281 | 1,282 | 1,313 | 1,267 | 1,219 | 1,203 | 1,203 | 1,203 | 1,188 | 1,251 | 15,038 |
| Quantity Charge | | 9,762 | 12,477 | 18,534 | 14,545 | 6,411 | 1,741 | 260 | 1,810 | 289 | 278 | 363 | 1,611 | 68,080 |
| ***Total Residential Irrigation Revenues*** | | **$11,647** | **$14,419** | **$20,388** | **$16,400** | **$8,324** | **$3,567** | **$1,999** | **$3,520** | **$1,999** | **$1,988** | **$2,044** | **$3,408** | **$89,703** |

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| *Effective 7.1.19* | | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 | Nov-23 | Dec-23 | Jan-24 | Feb-24 | Mar-24 | Apr-24 | May-24 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Multi-Family** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 684 | 685 | 689 | 684 | 686 | 685 | 684 | 684 | 684 | 682 | 683 | 687 | 685 |
| Multi-Family Units | 0.00 | 3,489 | 3,498 | 3,504 | 3,490 | 3,499 | 3,494 | 3,491 | 3,501 | 3,509 | 3,470 | 3,489 | 3,501 | 3,495 |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 508 | 508 | 512 | 508 | 508 | 506 | 508 | 507 | 505 | 507 | 506 | 511 | 508 |
| 1" | 16.29 | 74 | 74 | 75 | 73 | 75 | 77 | 74 | 74 | 76 | 73 | 75 | 74 | 75 |
| 1.5" | 74.52 | 53 | 54 | 53 | 54 | 54 | 53 | 53 | 54 | 54 | 53 | 53 | 53 | 53 |
| 2" | 118.41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 |
| 3" | 237.45 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 4" | 376.59 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **684** | **685** | **689** | **684** | **686** | **685** | **684** | **684** | **684** | **682** | **683** | **687** | **685** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| 0 - 300 | $0.0280 | 0 | 0 | 0 | 0 | 941,010 | 896,966 | 796,039 | 809,439 | 785,105 | 799,117 | 827,213 | 854,227 | 6,709,116 |
| 301 - 1,000 | 0.0348 | 0 | 0 | 0 | 0 | 703,959 | 537,475 | 359,017 | 307,759 | 219,318 | 286,391 | 313,142 | 459,750 | 3,186,811 |
| 1,001 - 2,500 | 0.0472 | 0 | 0 | 0 | 0 | 137,706 | 85,425 | 30,009 | 43,248 | 16,489 | 22,873 | 15,723 | 30,408 | 381,881 |
| Over 2,500 | 0.0609 | 0 | 0 | 0 | 0 | 31,521 | 21,609 | 28,355 | 30,870 | 832 | 6,099 | 3,668 | 11,066 | 134,020 |
| ***June - September*** | | | | | | | | | | | | | | |
| 0 - 300 | $0.0280 | 920,834 | 965,840 | 953,525 | 959,429 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3,799,628 |
| 301 - 1,000 | 0.0348 | 804,064 | 984,125 | 1,094,066 | 1,099,264 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3,981,519 |
| 1,001 - 2,500 | 0.0472 | 237,592 | 282,749 | 337,449 | 361,115 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,218,905 |
| 2,501 - 3,600 | 0.0609 | 15,002 | 20,285 | 29,158 | 32,141 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 96,586 |
| Over 3,600 | 0.0784 | 20,318 | 10,843 | 35,023 | 30,929 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 97,113 |
| | | **1,997,810** | **2,263,842** | **2,449,221** | **2,482,878** | **1,814,196** | **1,541,475** | **1,213,420** | **1,191,316** | **1,021,744** | **1,114,480** | **1,159,746** | **1,355,451** | **19,605,579** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $9,118 | $9,131 | $9,184 | $9,118 | $9,144 | $9,131 | $9,118 | $9,118 | $9,118 | $9,091 | $9,104 | $9,158 | $109,533 |
| Service Charges | | 20,401 | 20,475 | 20,480 | 20,459 | 20,492 | 20,419 | 20,401 | 20,460 | 20,461 | 20,369 | 20,386 | 20,448 | 245,251 |
| Quantity Charge | | 67,486 | 76,722 | 85,221 | 86,545 | 59,265 | 49,167 | 37,926 | 37,296 | 30,444 | 33,793 | 35,025 | 42,027 | 640,917 |
| ***Total Multi-Family Revenues*** | | **$97,004** | **$106,329** | **$114,885** | **$116,122** | **$88,902** | **$78,717** | **$67,445** | **$66,873** | **$60,023** | **$63,253** | **$64,515** | **$71,632** | **$995,700** |

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| *Effective 7.1.19* | | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 | Nov-23 | Dec-23 | Jan-24 | Feb-24 | Mar-24 | Apr-24 | May-24 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Commercial** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 689 | 692 | 689 | 689 | 688 | 687 | 686 | 693 | 686 | 689 | 691 | 692 | 689 |
| | | **689** | **692** | **689** | **689** | **688** | **687** | **686** | **693** | **686** | **689** | **691** | **692** | **689** |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 431 | 436 | 433 | 432 | 432 | 433 | 432 | 434 | 431 | 433 | 436 | 434 | 433 |
| 1" | 16.29 | 134 | 132 | 132 | 132 | 132 | 131 | 132 | 136 | 132 | 132 | 132 | 134 | 133 |
| 1.5" | 74.52 | 66 | 66 | 66 | 67 | 67 | 67 | 66 | 67 | 67 | 67 | 67 | 66 | 67 |
| 2" | 118.41 | 51 | 51 | 51 | 51 | 50 | 49 | 49 | 49 | 49 | 49 | 49 | 51 | 50 |
| 3" | 237.45 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| 4" | 376.59 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 3 | 2 | 2 | 2 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **689** | **692** | **689** | **689** | **688** | **687** | **686** | **693** | **686** | **689** | **691** | **692** | **689** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***Less than 2" Meter*** | | | | | | | | | | | | | | |
| 0 - 2,500 | $0.0348 | 683,944 | 751,917 | 763,580 | 781,425 | 701,196 | 580,829 | 446,904 | 417,860 | 352,075 | 416,110 | 439,614 | 534,538 | 6,869,992 |
| Over 2,500 | 0.0472 | 402,488 | 542,393 | 627,829 | 575,448 | 375,116 | 251,320 | 179,488 | 147,065 | 112,551 | 169,688 | 163,724 | 225,944 | 3,773,054 |
| ***2" Meter or Larger*** | | | | | | | | | | | | | | |
| 0 - 15,000 | $0.0348 | 412,342 | 424,604 | 466,690 | 435,345 | 384,302 | 337,521 | 300,766 | 298,449 | 280,481 | 310,902 | 291,804 | 344,485 | 4,287,691 |
| Over 15,000 | 0.0472 | 358,210 | 461,560 | 441,328 | 432,400 | 380,230 | 224,030 | 205,840 | 166,860 | 82,970 | 166,560 | 123,720 | 173,960 | 3,217,668 |
| | | **1,856,984** | **2,180,474** | **2,299,427** | **2,224,618** | **1,840,844** | **1,393,700** | **1,132,998** | **1,030,234** | **828,077** | **1,063,260** | **1,018,862** | **1,278,927** | **18,148,405** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $9,184 | $9,224 | $9,184 | $9,184 | $9,171 | $9,158 | $9,144 | $9,238 | $9,144 | $9,184 | $9,211 | $9,224 | $110,252 |
| Service Charges | | 21,813 | 21,858 | 21,811 | 21,870 | 21,752 | 21,633 | 21,559 | 21,730 | 21,618 | 22,026 | 21,696 | 21,860 | 261,225 |
| Quantity Charge | | 74,056 | 88,330 | 93,278 | 89,914 | 73,428 | 54,395 | 44,206 | 39,745 | 31,242 | 41,171 | 39,021 | 49,465 | 718,249 |
| ***Total Commercial Revenues*** | | **$105,053** | **$119,412** | **$124,273** | **$120,969** | **$104,351** | **$85,186** | **$74,910** | **$70,712** | **$62,004** | **$72,381** | **$69,928** | **$80,549** | **$1,089,727** |

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| *Effective 7.1.19* | | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 | Nov-23 | Dec-23 | Jan-24 | Feb-24 | Mar-24 | Apr-24 | May-24 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Commercial Irrigation** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 170 | 171 | 171 | 173 | 176 | 167 | 133 | 128 | 103 | 103 | 113 | 162 | 148 |
| | | **170** | **171** | **171** | **173** | **176** | **167** | **133** | **128** | **103** | **103** | **113** | **162** | **148** |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 125 | 126 | 126 | 127 | 131 | 126 | 101 | 98 | 74 | 73 | 79 | 118 | 109 |
| 1" | 16.29 | 44 | 44 | 44 | 44 | 44 | 45 | 41 | 41 | 41 | 41 | 41 | 45 | 43 |
| 1.5" | 74.52 | 13 | 13 | 13 | 13 | 13 | 10 | 9 | 8 | 7 | 7 | 10 | 13 | 11 |
| 2" | 118.41 | 15 | 15 | 15 | 16 | 15 | 13 | 9 | 8 | 8 | 8 | 10 | 13 | 12 |
| 3" | 237.45 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 1 | 1 | 1 |
| 4" | 376.59 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **198** | **199** | **199** | **201** | **204** | **195** | **161** | **156** | **131** | **131** | **141** | **190** | **176** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| Non-Peak Consumption | $0.0376 | 0 | 0 | 0 | 0 | 655,866 | 170,321 | 38,222 | 23,418 | 16,177 | 22,748 | 43,825 | 375,452 | 1,346,029 |
| ***June - September*** | | | | | | | | | | | | | | |
| Peak Consumption | $0.0510 | 884,922 | 1,083,477 | 1,193,968 | 1,168,186 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4,330,553 |
| | | **884,922** | **1,083,477** | **1,193,968** | **1,168,186** | **655,866** | **170,321** | **38,222** | **23,418** | **16,177** | **22,748** | **43,825** | **375,452** | **5,676,582** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $2,266 | $2,279 | $2,279 | $2,306 | $2,346 | $2,226 | $1,773 | $1,706 | $1,373 | $1,373 | $1,506 | $2,159 | $23,594 |
| Service Charges | | 5,652 | 5,667 | 5,667 | 5,801 | 5,745 | 5,223 | 4,219 | 3,980 | 3,530 | 3,752 | 4,069 | 5,322 | 58,627 |
| Quantity Charge | | 45,131 | 55,257 | 60,892 | 59,577 | 24,661 | 6,404 | 1,437 | 881 | 608 | 855 | 1,648 | 14,117 | 271,469 |
| ***Total Commercial Irrigation Revenues*** | | **$53,049** | **$63,204** | **$68,839** | **$67,685** | **$32,752** | **$13,853** | **$7,429** | **$6,566** | **$5,511** | **$5,980** | **$7,223** | **$21,598** | **$353,690** |

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| *Effective 7.1.19* | | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 | Nov-23 | Dec-23 | Jan-24 | Feb-24 | Mar-24 | Apr-24 | May-24 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Institutional** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 82 | 82 | 82 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 |
| | | **82** | **82** | **82** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 |
| 1" | 16.29 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 |
| 1.5" | 74.52 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 |
| 2" | 118.41 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 |
| 3" | 237.45 | 6 | 6 | 6 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 |
| 4" | 376.59 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| 6" | 741.01 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 8" | 1,174.75 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| | | **82** | **82** | **82** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| All Consumption | $0.0334 | 568,916 | 416,477 | 609,421 | 710,908 | 535,123 | 563,307 | 467,907 | 310,106 | 536,905 | 513,434 | 415,907 | 514,004 | 6,162,415 |
| | | **568,916** | **416,477** | **609,421** | **710,908** | **535,123** | **563,307** | **467,907** | **310,106** | **536,905** | **513,434** | **415,907** | **514,004** | **6,162,415** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $1,093 | $1,093 | $1,093 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $13,237 |
| Service Charges | | 9,714 | 9,714 | 9,714 | 9,951 | 9,951 | 9,951 | 9,951 | 9,951 | 9,951 | 9,951 | 9,951 | 9,951 | 118,703 |
| Quantity Charge | | 19,002 | 13,910 | 20,355 | 23,744 | 17,873 | 18,814 | 15,628 | 10,358 | 17,933 | 17,149 | 13,891 | 17,168 | 205,825 |
| ***Total Institutional Revenues*** | | **$29,809** | **$24,717** | **$31,162** | **$34,802** | **$28,931** | **$29,872** | **$26,686** | **$21,415** | **$28,990** | **$28,206** | **$24,949** | **$28,225** | **$337,764** |

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| *Effective 7.1.19* | | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 | Nov-23 | Dec-23 | Jan-24 | Feb-24 | Mar-24 | Apr-24 | May-24 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Institutional Irrigation** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 |
| | | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 |
| 1" | 16.29 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 |
| 1.5" | 74.52 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 |
| 2" | 118.41 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 |
| 3" | 237.45 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| 4" | 376.59 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| 6" | 741.01 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| Non-Peak Consumption | $0.0376 | 0 | 0 | 0 | 0 | 1,493,859 | 260,299 | 151,194 | 10,977 | 26,168 | 28,606 | 111,321 | 867,257 | 2,949,681 |
| ***June - September*** | | | | | | | | | | | | | | |
| Peak Consumption | $0.0510 | 1,685,479 | 2,155,225 | 2,316,379 | 2,660,120 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 8,817,203 |
| | | **1,685,479** | **2,155,225** | **2,316,379** | **2,660,120** | **1,493,859** | **260,299** | **151,194** | **10,977** | **26,168** | **28,606** | **111,321** | **867,257** | **11,766,884** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $1,106 | $13,277 |
| Service Charges | | 8,767 | 8,767 | 8,767 | 8,767 | 8,767 | 8,767 | 8,767 | 8,767 | 8,767 | 8,767 | 8,767 | 8,767 | 105,209 |
| Quantity Charge | | 85,959 | 109,916 | 118,135 | 135,666 | 56,169 | 9,787 | 5,685 | 413 | 984 | 1,076 | 4,186 | 32,609 | 560,585 |
| ***Total Institutional Irrigation Revenues*** | | **$95,833** | **$119,790** | **$128,009** | **$145,540** | **$66,043** | **$19,661** | **$15,559** | **$10,287** | **$10,858** | **$10,949** | **$14,060** | **$42,483** | **$679,071** |

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| *Effective 7.1.19* | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 | Nov-23 | Dec-23 | Jan-24 | Feb-24 | Mar-24 | Apr-24 | May-24 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Summary** | | | | | | | | | | | | | |
| **# of Meters** | | | | | | | | | | | | | |
| Residential | 7,424 | 7,413 | 7,423 | 7,410 | 7,397 | 7,408 | 7,389 | 7,388 | 7,378 | 7,389 | 7,397 | 7,403 | **7,402** |
| Residential Irrigation | 71 | 73 | 70 | 70 | 72 | 69 | 66 | 65 | 65 | 65 | 64 | 68 | **68** |
| Multi-Family | 684 | 685 | 689 | 684 | 686 | 685 | 684 | 684 | 684 | 682 | 683 | 687 | **685** |
| Commercial | 689 | 692 | 689 | 689 | 688 | 687 | 686 | 693 | 686 | 689 | 691 | 692 | **689** |
| Commercial Irrigation | 198 | 199 | 199 | 201 | 204 | 195 | 161 | 156 | 131 | 131 | 141 | 190 | **176** |
| Institutional | 82 | 82 | 82 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | **83** |
| Institutional Irrigation | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | **100** |
| **Total Number of Customers** | **9,248** | **9,244** | **9,252** | **9,237** | **9,230** | **9,227** | **9,169** | **9,169** | **9,127** | **9,139** | **9,159** | **9,223** | **9,202** |
| **Consumption** | | | | | | | | | | | | | |
| Residential | 7,137,156 | 8,414,502 | 9,485,293 | 8,989,285 | 7,208,056 | 4,146,513 | 3,074,297 | 2,829,663 | 2,423,946 | 2,817,851 | 3,148,572 | 4,068,443 | **63,743,577** |
| Residential Irrigation | 164,542 | 205,921 | 289,254 | 241,096 | 133,508 | 41,259 | 7,097 | 32,795 | 6,842 | 6,779 | 9,539 | 37,040 | **1,175,672** |
| Multi-Family | 1,997,810 | 2,263,842 | 2,449,221 | 2,482,878 | 1,814,196 | 1,541,475 | 1,213,420 | 1,191,316 | 1,021,744 | 1,114,480 | 1,159,746 | 1,355,451 | **19,605,579** |
| Commercial | 1,856,984 | 2,180,474 | 2,299,427 | 2,224,618 | 1,840,844 | 1,393,700 | 1,132,998 | 1,030,234 | 828,077 | 1,063,260 | 1,018,862 | 1,278,927 | **18,148,405** |
| Commercial Irrigation | 884,922 | 1,083,477 | 1,193,968 | 1,168,186 | 655,866 | 170,321 | 38,222 | 23,418 | 16,177 | 22,748 | 43,825 | 375,452 | **5,676,582** |
| Institutional | 568,916 | 416,477 | 609,421 | 710,908 | 535,123 | 563,307 | 467,907 | 310,106 | 536,905 | 513,434 | 415,907 | 514,004 | **6,162,415** |
| Institutional Irrigation | 1,685,479 | 2,155,225 | 2,316,379 | 2,660,120 | 1,493,859 | 260,299 | 151,194 | 10,977 | 26,168 | 28,606 | 111,321 | 867,257 | **11,766,884** |
| **Total Consumption** | **14,295,809** | **16,719,918** | **18,642,963** | **18,477,091** | **13,681,452** | **8,116,874** | **6,085,135** | **5,428,509** | **4,859,859** | **5,567,158** | **5,907,772** | **8,496,574** | **126,279,114** |
| **Revenues** | | | | | | | | | | | | | |
| Customer Charge | $122,316 | $122,263 | $122,369 | $122,169 | $122,076 | $122,036 | $121,263 | $121,263 | $120,703 | $120,863 | $121,130 | $121,983 | $1,460,435 |
| Meter Charge | 184,937 | 184,934 | 185,000 | 185,207 | 184,893 | 184,305 | 182,866 | 182,824 | 182,107 | 182,815 | 182,987 | 184,565 | 2,207,440 |
| Quantity Charge | 583,892 | 702,260 | 804,459 | 789,457 | 532,476 | 283,137 | 206,134 | 180,883 | 157,127 | 184,189 | 201,659 | 295,653 | 4,921,325 |
| **Total Revenues** | **$891,145** | **$1,009,457** | **$1,111,829** | **$1,096,833** | **$839,445** | **$589,478** | **$510,262** | **$484,971** | **$459,938** | **$487,867** | **$505,775** | **$602,201** | **$8,589,200** |

| | |
|---|---|
| **FY 2024 Budget** | **$8,525,000** |
| *Difference* | *$64,200* |
| *Percent* | *0.8%* |
| **FY 2025 Budget** | **$8,840,000** |
| *Difference* | *($250,800)* |
| *Percent* | *-2.8%* |

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| *Effective 7.1.19* | | Jun-24 | Jul-24 | Aug-24 | Sep-24 | Oct-24 | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 | Apr-25 | May-25 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Residential** | | | | | | | | | | | | | | |
| **Customer Charge** | $ / Acct. / Mo. | | | | | | | | | | | | | |
| All Customers | $13.33 | 7,461 | 7,450 | 7,460 | 7,447 | 7,434 | 7,445 | 7,426 | 7,425 | 7,415 | 7,426 | 7,434 | 7,440 | 7,439 |
| | | **7,461** | **7,450** | **7,460** | **7,447** | **7,434** | **7,445** | **7,426** | **7,425** | **7,415** | **7,426** | **7,434** | **7,440** | **7,439** |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 7,127 | 7,112 | 7,123 | 7,111 | 7,098 | 7,107 | 7,088 | 7,087 | 7,078 | 7,092 | 7,099 | 7,103 | 7,102 |
| 1" | 16.29 | 318 | 322 | 321 | 320 | 320 | 322 | 322 | 322 | 321 | 318 | 318 | 321 | 320 |
| 1.5" | 74.52 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 13 | 12 | 12 |
| 2" | 118.41 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 3" | 237.45 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4" | 376.59 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **7,461** | **7,450** | **7,460** | **7,447** | **7,434** | **7,445** | **7,426** | **7,425** | **7,415** | **7,426** | **7,434** | **7,440** | **7,439** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| 0 - 300 | $0.0280 | 0 | 0 | 0 | 0 | 1,933,833 | 1,858,866 | 1,734,289 | 1,695,006 | 1,609,978 | 1,712,773 | 1,722,212 | 1,845,981 | 14,112,939 |
| 301 - 1,000 | 0.0348 | 0 | 0 | 0 | 0 | 2,379,882 | 1,599,079 | 1,012,629 | 932,310 | 692,863 | 914,190 | 973,956 | 1,606,952 | 10,111,861 |
| 1,001 - 2,500 | 0.0472 | 0 | 0 | 0 | 0 | 1,407,700 | 536,516 | 231,874 | 164,577 | 94,786 | 141,452 | 187,058 | 509,713 | 3,273,675 |
| Over 2,500 | 0.0609 | 0 | 0 | 0 | 0 | 1,522,681 | 172,785 | 110,877 | 51,918 | 38,439 | 63,525 | 281,089 | 126,140 | 2,367,453 |
| ***June - September*** | | | | | | | | | | | | | | |
| 0 - 300 | $0.0280 | 1,978,441 | 1,984,566 | 1,984,393 | 1,987,409 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7,934,809 |
| 301 - 1,000 | 0.0348 | 2,689,397 | 2,956,840 | 3,046,302 | 3,007,475 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 11,700,013 |
| 1,001 - 2,500 | 0.0472 | 1,774,402 | 2,465,147 | 2,922,708 | 2,692,138 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 9,854,395 |
| 2,501 - 3,600 | 0.0609 | 349,161 | 558,142 | 757,734 | 664,880 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2,329,917 |
| Over 3,600 | 0.0784 | 381,441 | 491,879 | 821,583 | 682,331 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2,377,234 |
| | | **7,172,842** | **8,456,575** | **9,532,719** | **9,034,231** | **7,244,096** | **4,167,246** | **3,089,668** | **2,843,811** | **2,436,066** | **2,831,940** | **3,164,315** | **4,088,785** | **64,062,295** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $99,457 | $99,309 | $99,443 | $99,269 | $99,095 | $99,242 | $98,988 | $98,974 | $98,840 | $98,988 | $99,095 | $99,175 | $1,189,877 |
| Meter Charge | | 117,879 | 117,709 | 117,865 | 117,661 | 117,457 | 117,631 | 117,332 | 117,317 | 117,159 | 117,330 | 117,514 | 117,551 | 1,410,404 |
| Quantity Charge | | 283,908 | 347,375 | 410,084 | 381,362 | 296,142 | 143,542 | 101,496 | 90,834 | 76,006 | 90,317 | 108,063 | 139,350 | 2,468,480 |
| ***Total Residential Revenues*** | | **$501,244** | **$564,393** | **$627,393** | **$598,292** | **$512,693** | **$360,415** | **$317,817** | **$307,125** | **$292,005** | **$306,634** | **$324,672** | **$356,077** | **$5,068,761** |

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| *Effective 7.1.19* | | Jun-24 | Jul-24 | Aug-24 | Sep-24 | Oct-24 | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 | Apr-25 | May-25 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Residential Irrigation** | | | | | | | | | | | | | | |
| **Customer Charge** | $ / Acct. / Mo. | | | | | | | | | | | | | |
| All Customers | $13.33 | 44 | 46 | 43 | 43 | 45 | 42 | 39 | 38 | 38 | 38 | 37 | 41 | 41 |
| | | **44** | **46** | **43** | **43** | **45** | **42** | **39** | **38** | **38** | **38** | **37** | **41** | **41** |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 50 | 53 | 50 | 49 | 51 | 48 | 46 | 45 | 45 | 45 | 44 | 47 | 48 |
| 1" | 16.29 | 18 | 17 | 17 | 18 | 18 | 18 | 17 | 17 | 17 | 17 | 17 | 18 | 18 |
| 1.5" | 74.52 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| 2" | 118.41 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3" | 237.45 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4" | 376.59 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **71** | **73** | **70** | **70** | **72** | **69** | **66** | **65** | **65** | **65** | **64** | **68** | **69** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| 0 - 1,000 | $0.0348 | 0 | 0 | 0 | 0 | 44,683 | 23,487 | 6,093 | 5,985 | 3,577 | 4,232 | 7,062 | 19,409 | 114,528 |
| 1,001 - 2,500 | 0.0472 | 0 | 0 | 0 | 0 | 41,005 | 11,883 | 1,039 | 2,352 | 2,551 | 1,809 | 2,525 | 10,355 | 73,518 |
| Over 2,500 | 0.0609 | 0 | 0 | 0 | 0 | 48,487 | 6,095 | 0 | 24,623 | 749 | 772 | 0 | 7,462 | 88,188 |
| ***June - September*** | | | | | | | | | | | | | | |
| 0 - 1,000 | $0.0348 | 42,325 | 47,379 | 50,554 | 51,705 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 191,962 |
| 1,001 - 2,500 | 0.0472 | 32,456 | 40,990 | 50,112 | 54,926 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 178,485 |
| 2,501 - 3,600 | 0.0609 | 16,874 | 19,475 | 22,674 | 23,494 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 82,517 |
| Over 3,600 | 0.0784 | 73,710 | 99,107 | 167,361 | 112,176 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 452,354 |
| | | **165,365** | **206,951** | **290,700** | **242,301** | **134,176** | **41,465** | **7,132** | **32,959** | **6,876** | **6,813** | **9,587** | **37,225** | **1,181,550** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $589 | $616 | $576 | $576 | $603 | $563 | $522 | $509 | $509 | $509 | $496 | $549 | $6,618 |
| Service Charges | | 1,304 | 1,335 | 1,288 | 1,289 | 1,320 | 1,273 | 1,225 | 1,209 | 1,209 | 1,209 | 1,194 | 1,257 | 15,113 |
| Quantity Charge | | 9,811 | 12,540 | 18,626 | 14,617 | 6,443 | 1,749 | 261 | 1,819 | 290 | 280 | 365 | 1,619 | 68,421 |
| ***Total Residential Irrigation Revenues*** | | **$11,705** | **$14,491** | **$20,490** | **$16,482** | **$8,366** | **$3,585** | **$2,009** | **$3,537** | **$2,009** | **$1,998** | **$2,054** | **$3,425** | **$90,152** |

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| *Effective 7.1.19* | | Jun-24 | Jul-24 | Aug-24 | Sep-24 | Oct-24 | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 | Apr-25 | May-25 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Multi-Family** | | | | | | | | | | | | | | |
| **Customer Charge** | $ / Acct. / Mo. | | | | | | | | | | | | | |
| All Customers | $13.33 | 687 | 688 | 692 | 687 | 689 | 688 | 687 | 687 | 687 | 685 | 686 | 690 | 688 |
| Multi-Family Units | 0.00 | 3,506 | 3,515 | 3,522 | 3,507 | 3,516 | 3,511 | 3,508 | 3,519 | 3,527 | 3,487 | 3,506 | 3,519 | 3,512 |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 511 | 511 | 515 | 511 | 511 | 509 | 511 | 510 | 508 | 510 | 509 | 514 | 510 |
| 1" | 16.29 | 74 | 74 | 75 | 73 | 75 | 77 | 74 | 74 | 76 | 73 | 75 | 74 | 75 |
| 1.5" | 74.52 | 53 | 54 | 53 | 54 | 54 | 53 | 53 | 54 | 54 | 53 | 53 | 53 | 54 |
| 2" | 118.41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 | 41 |
| 3" | 237.45 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 4" | 376.59 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **687** | **688** | **692** | **687** | **689** | **688** | **687** | **687** | **687** | **685** | **686** | **690** | **688** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| 0 - 300 | $0.0280 | 0 | 0 | 0 | 0 | 945,715 | 901,451 | 800,019 | 813,486 | 789,031 | 803,113 | 831,349 | 858,498 | 6,742,662 |
| 301 - 1,000 | 0.0348 | 0 | 0 | 0 | 0 | 707,479 | 540,162 | 360,812 | 309,298 | 220,415 | 287,823 | 314,708 | 462,049 | 3,202,745 |
| 1,001 - 2,500 | 0.0472 | 0 | 0 | 0 | 0 | 138,395 | 85,852 | 30,159 | 43,464 | 16,571 | 22,987 | 15,802 | 30,560 | 383,790 |
| Over 2,500 | 0.0609 | 0 | 0 | 0 | 0 | 31,679 | 21,717 | 28,497 | 31,024 | 836 | 6,129 | 3,686 | 11,121 | 134,690 |
| ***June - September*** | | | | | | | | | | | | | | |
| 0 - 300 | $0.0280 | 925,438 | 970,669 | 958,293 | 964,226 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3,818,626 |
| 301 - 1,000 | 0.0348 | 808,084 | 989,046 | 1,099,536 | 1,104,760 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4,001,427 |
| 1,001 - 2,500 | 0.0472 | 238,780 | 284,163 | 339,136 | 362,921 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,225,000 |
| 2,501 - 3,600 | 0.0609 | 15,077 | 20,386 | 29,304 | 32,302 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 97,069 |
| Over 3,600 | 0.0784 | 20,420 | 10,897 | 35,198 | 31,084 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 97,599 |
| | | **2,007,799** | **2,275,161** | **2,461,467** | **2,495,292** | **1,823,267** | **1,549,182** | **1,219,487** | **1,197,273** | **1,026,853** | **1,120,052** | **1,165,545** | **1,362,228** | **19,703,607** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $9,163 | $9,177 | $9,230 | $9,163 | $9,190 | $9,177 | $9,163 | $9,163 | $9,163 | $9,137 | $9,150 | $9,203 | $110,080 |
| Service Charges | | 20,503 | 20,578 | 20,582 | 20,561 | 20,594 | 20,521 | 20,503 | 20,562 | 20,563 | 20,471 | 20,488 | 20,550 | 246,477 |
| Quantity Charge | | 67,823 | 77,106 | 85,647 | 86,978 | 59,562 | 49,413 | 38,116 | 37,482 | 30,596 | 33,962 | 35,200 | 42,237 | 644,122 |
| ***Total Multi-Family Revenues*** | | **$97,489** | **$106,860** | **$115,460** | **$116,703** | **$89,346** | **$79,110** | **$67,782** | **$67,208** | **$60,323** | **$63,569** | **$64,838** | **$71,991** | **$1,000,679** |

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| *Effective 7.1.19* | | Jun-24 | Jul-24 | Aug-24 | Sep-24 | Oct-24 | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 | Apr-25 | May-25 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Commercial** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 692 | 695 | 692 | 692 | 691 | 690 | 689 | 696 | 689 | 692 | 694 | 695 | 693 |
| | | **692** | **695** | **692** | **692** | **691** | **690** | **689** | **696** | **689** | **692** | **694** | **695** | **693** |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 433 | 438 | 435 | 434 | 434 | 435 | 434 | 436 | 433 | 435 | 438 | 436 | 435 |
| 1" | 16.29 | 135 | 133 | 133 | 133 | 133 | 132 | 133 | 137 | 133 | 133 | 133 | 135 | 133 |
| 1.5" | 74.52 | 66 | 66 | 66 | 67 | 67 | 67 | 66 | 67 | 67 | 67 | 67 | 66 | 67 |
| 2" | 118.41 | 51 | 51 | 51 | 51 | 50 | 49 | 49 | 49 | 49 | 49 | 49 | 51 | 50 |
| 3" | 237.45 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| 4" | 376.59 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 3 | 2 | 2 | 2 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **692** | **695** | **692** | **692** | **691** | **690** | **689** | **696** | **689** | **692** | **694** | **695** | **693** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***Less than 2" Meter*** | | | | | | | | | | | | | | |
| 0 - 2,500 | $0.0348 | 687,364 | 755,677 | 767,398 | 785,332 | 704,702 | 583,733 | 449,139 | 419,949 | 353,835 | 418,191 | 441,812 | 537,211 | 6,904,342 |
| Over 2,500 | 0.0472 | 404,500 | 545,105 | 630,968 | 578,325 | 376,992 | 252,577 | 180,385 | 147,800 | 113,114 | 170,536 | 164,543 | 227,074 | 3,791,919 |
| ***2" Meter or Larger*** | | | | | | | | | | | | | | |
| 0 - 15,000 | $0.0348 | 414,404 | 426,727 | 469,023 | 437,522 | 386,224 | 339,209 | 302,270 | 299,941 | 281,883 | 312,457 | 293,263 | 346,207 | 4,309,129 |
| Over 15,000 | 0.0472 | 360,001 | 463,868 | 443,535 | 434,562 | 382,131 | 225,150 | 206,869 | 167,694 | 83,385 | 167,393 | 124,339 | 174,830 | 3,233,756 |
| | | **1,866,269** | **2,191,376** | **2,310,924** | **2,235,741** | **1,850,048** | **1,400,669** | **1,138,663** | **1,035,385** | **832,217** | **1,068,576** | **1,023,956** | **1,285,322** | **18,239,147** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $9,230 | $9,270 | $9,230 | $9,230 | $9,217 | $9,203 | $9,190 | $9,284 | $9,190 | $9,230 | $9,257 | $9,270 | $110,804 |
| Service Charges | | 21,922 | 21,968 | 21,920 | 21,980 | 21,861 | 21,741 | 21,667 | 21,839 | 21,726 | 22,136 | 21,804 | 21,969 | 262,531 |
| Quantity Charge | | 74,426 | 88,771 | 93,744 | 90,364 | 73,795 | 54,667 | 44,427 | 39,944 | 31,398 | 41,377 | 39,216 | 49,713 | 721,841 |
| ***Total Commercial Revenues*** | | **$105,578** | **$120,009** | **$124,895** | **$121,574** | **$104,872** | **$85,612** | **$75,284** | **$71,066** | **$62,314** | **$72,743** | **$70,277** | **$80,952** | **$1,095,176** |

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| *Effective 7.1.19* | | Jun-24 | Jul-24 | Aug-24 | Sep-24 | Oct-24 | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 | Apr-25 | May-25 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Commercial Irrigation** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 171 | 172 | 172 | 174 | 177 | 168 | 134 | 129 | 104 | 104 | 114 | 163 | 148 |
| | | **171** | **172** | **172** | **174** | **177** | **168** | **134** | **129** | **104** | **104** | **114** | **163** | **148** |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 126 | 127 | 127 | 128 | 132 | 127 | 102 | 98 | 74 | 73 | 79 | 119 | 109 |
| 1" | 16.29 | 44 | 44 | 44 | 44 | 44 | 45 | 41 | 41 | 41 | 41 | 41 | 45 | 43 |
| 1.5" | 74.52 | 13 | 13 | 13 | 13 | 13 | 10 | 9 | 8 | 7 | 7 | 10 | 13 | 11 |
| 2" | 118.41 | 15 | 15 | 15 | 16 | 15 | 13 | 9 | 8 | 8 | 8 | 10 | 13 | 12 |
| 3" | 237.45 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 1 | 1 | 1 |
| 4" | 376.59 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6" | 741.01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **199** | **200** | **200** | **202** | **205** | **196** | **162** | **157** | **132** | **132** | **142** | **191** | **176** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| Non-Peak Consumption | $0.0376 | 0 | 0 | 0 | 0 | 659,145 | 171,173 | 38,413 | 23,535 | 16,258 | 22,862 | 44,044 | 377,329 | 1,352,759 |
| ***June - September*** | | | | | | | | | | | | | | |
| Peak Consumption | $0.0510 | 889,347 | 1,088,894 | 1,199,938 | 1,174,027 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4,352,206 |
| | | **889,347** | **1,088,894** | **1,199,938** | **1,174,027** | **659,145** | **171,173** | **38,413** | **23,535** | **16,258** | **22,862** | **44,044** | **377,329** | **5,704,965** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $2,277 | $2,291 | $2,291 | $2,318 | $2,358 | $2,237 | $1,782 | $1,715 | $1,380 | $1,380 | $1,514 | $2,170 | $23,712 |
| Service Charges | | 5,680 | 5,696 | 5,696 | 5,830 | 5,774 | 5,249 | 4,240 | 3,999 | 3,548 | 3,771 | 4,089 | 5,348 | 58,920 |
| Quantity Charge | | 45,357 | 55,534 | 61,197 | 59,875 | 24,784 | 6,436 | 1,444 | 885 | 611 | 860 | 1,656 | 14,188 | 272,826 |
| ***Total Commercial Irrigation Revenues*** | | **$53,314** | **$63,520** | **$69,183** | **$68,023** | **$32,916** | **$13,923** | **$7,467** | **$6,599** | **$5,539** | **$6,010** | **$7,259** | **$21,706** | **$355,459** |

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| *Effective 7.1.19* | | Jun-24 | Jul-24 | Aug-24 | Sep-24 | Oct-24 | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 | Apr-25 | May-25 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Institutional** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 82 | 82 | 82 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 |
| | | **82** | **82** | **82** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 |
| 1" | 16.29 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 |
| 1.5" | 74.52 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 |
| 2" | 118.41 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 |
| 3" | 237.45 | 6 | 6 | 6 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 |
| 4" | 376.59 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| 6" | 741.01 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 8" | 1,174.75 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| | | **82** | **82** | **82** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| All Consumption | $0.0334 | 571,761 | 418,559 | 612,468 | 714,463 | 537,799 | 566,124 | 470,247 | 311,657 | 539,590 | 516,001 | 417,987 | 516,574 | 6,193,227 |
| | | **571,761** | **418,559** | **612,468** | **714,463** | **537,799** | **566,124** | **470,247** | **311,657** | **539,590** | **516,001** | **417,987** | **516,574** | **6,193,227** |
| ***Revenues*** | | | | | | | | | | | | | | |
| Customer Charge | | $1,099 | $1,099 | $1,099 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $13,303 |
| Service Charges | | 9,762 | 9,762 | 9,762 | 10,001 | 10,001 | 10,001 | 10,001 | 10,001 | 10,001 | 10,001 | 10,001 | 10,001 | 119,297 |
| Quantity Charge | | 19,097 | 13,980 | 20,456 | 23,863 | 17,962 | 18,909 | 15,706 | 10,409 | 18,022 | 17,234 | 13,961 | 17,254 | 206,854 |
| ***Total Institutional Revenues*** | | **$29,958** | **$24,841** | **$31,317** | **$34,976** | **$29,075** | **$30,021** | **$26,819** | **$21,522** | **$29,135** | **$28,347** | **$25,074** | **$28,367** | **$339,453** |

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| *Effective 7.1.19* | | Jun-24 | Jul-24 | Aug-24 | Sep-24 | Oct-24 | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 | Apr-25 | May-25 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Institutional Irrigation** | | | | | | | | | | | | | | |
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| All Customers | $13.33 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 |
| | | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** | **83** |
| **Service Charges** | *$ / Acct. / Mo.* | | | | | | | | | | | | | |
| 0.75" | $15.62 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 | 27 |
| 1" | 16.29 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 |
| 1.5" | 74.52 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 |
| 2" | 118.41 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 | 28 |
| 3" | 237.45 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| 4" | 376.59 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| 6" | 741.01 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 8" | 1,174.75 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | **101** | **101** | **101** | **101** | **101** | **101** | **101** | **101** | **101** | **101** | **101** | **101** | **101** |
| **Quantity Charge** | *$ / cf* | | | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | | | | |
| Non-Peak Consumption | $0.0376 | 0 | 0 | 0 | 0 | 1,501,328 | 261,600 | 151,950 | 11,032 | 26,299 | 28,749 | 111,878 | 871,593 | 2,964,429 |
| ***June - September*** | | | | | | | | | | | | | | |
| Peak Consumption | $0.0510 | 1,693,906 | 2,166,001 | 2,327,961 | 2,673,421 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 8,861,289 |
| | | **1,693,906** | **2,166,001** | **2,327,961** | **2,673,421** | **1,501,328** | **261,600** | **151,950** | **11,032** | **26,299** | **28,749** | **111,878** | **871,593** | **11,825,718** |
| **Revenues** | | | | | | | | | | | | | | |
| Customer Charge | | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $1,112 | $13,343 |
| Service Charges | | 8,811 | 8,811 | 8,811 | 8,811 | 8,811 | 8,811 | 8,811 | 8,811 | 8,811 | 8,811 | 8,811 | 8,811 | 105,735 |
| Quantity Charge | | 86,389 | 110,466 | 118,726 | 136,344 | 56,450 | 9,836 | 5,713 | 415 | 989 | 1,081 | 4,207 | 32,772 | 563,388 |
| ***Total Institutional Irrigation Revenues*** | | **$96,312** | **$120,389** | **$128,649** | **$146,268** | **$66,373** | **$19,759** | **$15,637** | **$10,338** | **$10,912** | **$11,004** | **$14,130** | **$42,695** | **$682,467** |

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| *Effective 7.1.19* | Jun-24 | Jul-24 | Aug-24 | Sep-24 | Oct-24 | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 | Apr-25 | May-25 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Summary** | | | | | | | | | | | | | |
| **Customers** | | | | | | | | | | | | | |
| Residential | 7,461 | 7,450 | 7,460 | 7,447 | 7,434 | 7,445 | 7,426 | 7,425 | 7,415 | 7,426 | 7,434 | 7,440 | **7,439** |
| Residential Irrigation | 44 | 46 | 43 | 43 | 45 | 42 | 39 | 38 | 38 | 38 | 37 | 41 | **41** |
| Multi-Family | 687 | 688 | 692 | 687 | 689 | 688 | 687 | 687 | 687 | 685 | 686 | 690 | **688** |
| Commercial | 692 | 695 | 692 | 692 | 691 | 690 | 689 | 696 | 689 | 692 | 694 | 695 | **693** |
| Commercial Irrigation | 171 | 172 | 172 | 174 | 177 | 168 | 134 | 129 | 104 | 104 | 114 | 163 | **148** |
| Institutional | 82 | 82 | 82 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | **83** |
| Institutional Irrigation | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | 83 | **83** |
| **Total Number of Customers** | **9,222** | **9,218** | **9,226** | **9,211** | **9,204** | **9,201** | **9,142** | **9,142** | **9,100** | **9,112** | **9,132** | **9,197** | **9,176** |
| **Consumption** | | | | | | | | | | | | | |
| Residential | 7,172,842 | 8,456,575 | 9,532,719 | 9,034,231 | 7,244,096 | 4,167,246 | 3,089,668 | 2,843,811 | 2,436,066 | 2,831,940 | 3,164,315 | 4,088,785 | **64,062,295** |
| Residential Irrigation | 165,365 | 206,951 | 290,700 | 242,301 | 134,176 | 41,465 | 7,132 | 32,959 | 6,876 | 6,813 | 9,587 | 37,225 | **1,181,550** |
| Multi-Family | 2,007,799 | 2,275,161 | 2,461,467 | 2,495,292 | 1,823,267 | 1,549,182 | 1,219,487 | 1,197,273 | 1,026,853 | 1,120,052 | 1,165,545 | 1,362,228 | **19,703,607** |
| Commercial | 1,866,269 | 2,191,376 | 2,310,924 | 2,235,741 | 1,850,048 | 1,400,669 | 1,138,663 | 1,035,385 | 832,217 | 1,068,576 | 1,023,956 | 1,285,322 | **18,239,147** |
| Commercial Irrigation | 889,347 | 1,088,894 | 1,199,938 | 1,174,027 | 659,145 | 171,173 | 38,413 | 23,535 | 16,258 | 22,862 | 44,044 | 377,329 | **5,704,965** |
| Institutional | 571,761 | 418,559 | 612,468 | 714,463 | 537,799 | 566,124 | 470,247 | 311,657 | 539,590 | 516,001 | 417,987 | 516,574 | **6,193,227** |
| Institutional Irrigation | 1,693,906 | 2,166,001 | 2,327,961 | 2,673,421 | 1,501,328 | 261,600 | 151,950 | 11,032 | 26,299 | 28,749 | 111,878 | 871,593 | **11,825,718** |
| **Total Consumption** | **14,367,288** | **16,803,518** | **18,736,178** | **18,569,476** | **13,749,859** | **8,157,458** | **6,115,561** | **5,455,652** | **4,884,158** | **5,594,994** | **5,937,311** | **8,539,057** | **126,910,510** |
| **Revenues** | | | | | | | | | | | | | |
| Customer Charge | $122,928 | $122,874 | $122,981 | $122,780 | $122,687 | $122,646 | $121,869 | $121,869 | $121,307 | $121,467 | $121,735 | $122,593 | $1,467,737 |
| Meter Charge | 185,862 | 185,859 | 185,925 | 186,133 | 185,818 | 185,227 | 183,780 | 183,738 | 183,018 | 183,729 | 183,902 | 185,488 | 2,218,478 |
| Quantity Charge | 586,811 | 705,771 | 808,481 | 793,404 | 535,138 | 284,553 | 207,165 | 181,788 | 157,913 | 185,110 | 202,667 | 297,131 | 4,945,932 |
| **Total Revenues** | **$895,600** | **$1,014,504** | **$1,117,388** | **$1,102,317** | **$843,642** | **$592,426** | **$512,814** | **$487,396** | **$462,237** | **$490,306** | **$508,304** | **$605,212** | **$8,632,146** |

| | |
|---|---|
| **FY 2024 Budget** | **$8,525,000** |
| *Difference* | *$107,146* |
| *Percent* | *1.3%* |
| **FY 2025 Budget** | **$8,840,000** |
| *Difference* | *($207,854)* |
| *Percent* | *-2.4%* |

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| | *Current* | *Projected* | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | *FY 2024* | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FY 2031 | FY 2032 | FY 2033 | *Notes* |
| **Meter Charge** | | | | | | | | | | | |
| ***Residential*** | | | | | | | | | | | |
| 0.75" | 7,067 | 7,102 | 7,138 | 7,174 | 7,209 | 7,246 | 7,282 | 7,318 | 7,355 | 7,392 | As Customer Growth |
| 1" | 318 | 320 | 322 | 323 | 325 | 326 | 328 | 330 | 331 | 333 | As Customer Growth |
| 1.5" | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 13 | 13 | 13 | As Customer Growth |
| 2" | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | As Customer Growth |
| 3" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 4" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 6" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 8" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| ***Total Residential Mtrs*** | **7,402** | **7,439** | **7,476** | **7,513** | **7,551** | **7,588** | **7,626** | **7,665** | **7,703** | **7,741** | |
| ***Residential Irrigation*** | | | | | | | | | | | |
| Customer Charge | 41 | 41 | 42 | 42 | 42 | 42 | 42 | 43 | 43 | 43 | As Customer Growth |
| 0.75" | 48 | 48 | 48 | 48 | 49 | 49 | 49 | 49 | 50 | 50 | As Customer Growth |
| 1" | 17 | 18 | 18 | 18 | 18 | 18 | 18 | 18 | 18 | 18 | As Customer Growth |
| 1.5" | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | As Customer Growth |
| 2" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 3" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 4" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 6" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 8" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| ***Total Residential Irrigation Mtrs*** | **68** | **69** | **69** | **69** | **70** | **70** | **70** | **71** | **71** | **71** | |
| ***Multi-Family*** | | | | | | | | | | | |
| 0.75" | 508 | 510 | 513 | 515 | 518 | 521 | 523 | 526 | 529 | 531 | As Customer Growth |
| 1" | 75 | 75 | 75 | 76 | 76 | 76 | 77 | 77 | 78 | 78 | As Customer Growth |
| 1.5" | 53 | 54 | 54 | 54 | 54 | 55 | 55 | 55 | 56 | 56 | As Customer Growth |
| 2" | 41 | 41 | 41 | 42 | 42 | 42 | 42 | 42 | 43 | 43 | As Customer Growth |
| 3" | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | As Customer Growth |
| 4" | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | As Customer Growth |
| 6" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 8" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| ***Total Multi-Family Mtrs*** | **685** | **688** | **692** | **695** | **699** | **702** | **706** | **709** | **713** | **716** | |
| ***Commercial*** | | | | | | | | | | | |
| 0.75" | 433 | 435 | 437 | 440 | 442 | 444 | 446 | 448 | 451 | 453 | As Customer Growth |
| 1" | 133 | 133 | 134 | 135 | 135 | 136 | 137 | 137 | 138 | 139 | As Customer Growth |
| 1.5" | 67 | 67 | 67 | 68 | 68 | 68 | 69 | 69 | 69 | 70 | As Customer Growth |
| 2" | 50 | 50 | 50 | 51 | 51 | 51 | 51 | 52 | 52 | 52 | As Customer Growth |
| 3" | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | As Customer Growth |
| 4" | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | As Customer Growth |
| 6" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 8" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| ***Total Commercial Mtrs*** | **689** | **693** | **696** | **700** | **703** | **707** | **710** | **714** | **717** | **721** | |

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| | *Current* | *Projected* | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | *FY 2024* | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FY 2031 | FY 2032 | FY 2033 | *Notes* |
| ***Commercial Irrigation*** | | | | | | | | | | | |
| Customer Charge | 148 | 148 | 149 | 150 | 150 | 151 | 152 | 153 | 154 | 154 | As Customer Growth |
| 0.75" | 109 | 109 | 110 | 110 | 111 | 111 | 112 | 113 | 113 | 114 | As Customer Growth |
| 1" | 43 | 43 | 43 | 44 | 44 | 44 | 44 | 44 | 45 | 45 | As Customer Growth |
| 1.5" | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | As Customer Growth |
| 2" | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 13 | 13 | 13 | As Customer Growth |
| 3" | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | As Customer Growth |
| 4" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 6" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| 8" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| ***Total Commercial Irrigation Mtrs*** | **176** | **176** | **177** | **178** | **179** | **180** | **181** | **182** | **183** | **184** | |
| ***Institutional*** | | | | | | | | | | | |
| 0.75" | 19 | 19 | 19 | 19 | 19 | 19 | 20 | 20 | 20 | 20 | As Customer Growth |
| 1" | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 17 | 17 | 17 | As Customer Growth |
| 1.5" | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | As Customer Growth |
| 2" | 25 | 25 | 25 | 25 | 26 | 26 | 26 | 26 | 26 | 26 | As Customer Growth |
| 3" | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | As Customer Growth |
| 4" | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | As Customer Growth |
| 6" | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | As Customer Growth |
| 8" | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | As Customer Growth |
| ***Total Institutional Mtrs*** | **83** | **83** | **84** | **84** | **84** | **85** | **85** | **86** | **86** | **87** | |
| ***Institutional Irrigation*** | | | | | | | | | | | |
| Customer Charge | 83 | 83 | 84 | 84 | 85 | 85 | 86 | 86 | 86 | 87 | As Customer Growth |
| 0.75" | 27 | 27 | 27 | 27 | 28 | 28 | 28 | 28 | 28 | 28 | As Customer Growth |
| 1" | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 16 | 16 | 16 | As Customer Growth |
| 1.5" | 20 | 20 | 20 | 20 | 20 | 21 | 21 | 21 | 21 | 21 | As Customer Growth |
| 2" | 28 | 28 | 28 | 28 | 29 | 29 | 29 | 29 | 29 | 29 | As Customer Growth |
| 3" | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | As Customer Growth |
| 4" | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | As Customer Growth |
| 6" | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | As Customer Growth |
| 8" | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Customer Growth |
| ***Total Institutional Irrigation Mtrs*** | **100** | **101** | **101** | **102** | **102** | **103** | **103** | **104** | **104** | **105** | |
| **Total** | | | | | | | | | | | |
| ***Meter Charge*** | | | | | | | | | | | |
| 0.75" | 8,210 | 8,251 | 8,293 | 8,334 | 8,376 | 8,418 | 8,460 | 8,502 | 8,545 | 8,587 | |
| 1" | 617 | 620 | 623 | 626 | 629 | 632 | 636 | 639 | 642 | 645 | |
| 1.5" | 174 | 175 | 176 | 176 | 177 | 178 | 179 | 180 | 181 | 182 | |
| 2" | 160 | 161 | 162 | 162 | 163 | 164 | 165 | 166 | 167 | 167 | |
| 3" | 23 | 23 | 23 | 23 | 23 | 23 | 24 | 24 | 24 | 24 | |
| 4" | 15 | 15 | 15 | 15 | 15 | 15 | 16 | 16 | 16 | 16 | |
| 6" | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | |
| 8" | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | |
| | **9,202** | **9,248** | **9,294** | **9,341** | **9,387** | **9,434** | **9,482** | **9,529** | **9,577** | **9,624** | |

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| | *Current* | *Projected* | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | *FY 2024* | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FY 2031 | FY 2032 | FY 2033 | *Notes* |
| **Consumption - Quantity Charge** | | | | | | | | | | | |
| ***Residential*** | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | |
| 0 - 300 | 14,042,725 | 14,112,939 | 14,183,503 | 14,254,421 | 14,325,693 | 14,397,321 | 14,469,308 | 14,541,655 | 14,614,363 | 14,687,435 | As Consumption Growth |
| 301 - 1,000 | 10,061,553 | 10,111,861 | 10,162,420 | 10,213,232 | 10,264,298 | 10,315,620 | 10,367,198 | 10,419,034 | 10,471,129 | 10,523,485 | As Consumption Growth |
| 1,001 - 2,500 | 3,257,388 | 3,273,675 | 3,290,043 | 3,306,494 | 3,323,026 | 3,339,641 | 3,356,339 | 3,373,121 | 3,389,987 | 3,406,937 | As Consumption Growth |
| Over 2,500 | 2,355,675 | 2,367,453 | 2,379,291 | 2,391,187 | 2,403,143 | 2,415,159 | 2,427,235 | 2,439,371 | 2,451,568 | 2,463,825 | As Consumption Growth |
| ***June - September*** | | | | | | | | | | | |
| 0 - 300 | 7,895,332 | 7,934,809 | 7,974,483 | 8,014,355 | 8,054,427 | 8,094,699 | 8,135,173 | 8,175,848 | 8,216,728 | 8,257,811 | As Consumption Growth |
| 301 - 1,000 | 11,641,804 | 11,700,013 | 11,758,513 | 11,817,306 | 11,876,392 | 11,935,774 | 11,995,453 | 12,055,430 | 12,115,707 | 12,176,286 | As Consumption Growth |
| 1,001 - 2,500 | 9,805,368 | 9,854,395 | 9,903,667 | 9,953,185 | 10,002,951 | 10,052,966 | 10,103,231 | 10,153,747 | 10,204,516 | 10,255,538 | As Consumption Growth |
| 2,501 - 3,600 | 2,318,325 | 2,329,917 | 2,341,566 | 2,353,274 | 2,365,040 | 2,376,866 | 2,388,750 | 2,400,694 | 2,412,697 | 2,424,761 | As Consumption Growth |
| Over 3,600 | 2,365,407 | 2,377,234 | 2,389,120 | 2,401,066 | 2,413,071 | 2,425,136 | 2,437,262 | 2,449,448 | 2,461,696 | 2,474,004 | As Consumption Growth |
| ***Total Residential Use*** | **63,743,577** | **64,062,295** | **64,382,606** | **64,704,519** | **65,028,042** | **65,353,182** | **65,679,948** | **66,008,348** | **66,338,390** | **66,670,082** | |
| ***Residential Irrigation*** | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | |
| 0 - 1,000 | 113,958 | 114,528 | 115,100 | 115,676 | 116,254 | 116,836 | 117,420 | 118,007 | 118,597 | 119,190 | As Consumption Growth |
| 1,001 - 2,500 | 73,152 | 73,518 | 73,885 | 74,255 | 74,626 | 74,999 | 75,374 | 75,751 | 76,130 | 76,510 | As Consumption Growth |
| Over 2,500 | 87,749 | 88,188 | 88,629 | 89,072 | 89,517 | 89,965 | 90,415 | 90,867 | 91,321 | 91,778 | As Consumption Growth |
| ***June - September*** | | | | | | | | | | | |
| 0 - 1,000 | 191,007 | 191,962 | 192,922 | 193,886 | 194,856 | 195,830 | 196,809 | 197,793 | 198,782 | 199,776 | As Consumption Growth |
| 1,001 - 2,500 | 177,597 | 178,485 | 179,377 | 180,274 | 181,176 | 182,082 | 182,992 | 183,907 | 184,826 | 185,751 | As Consumption Growth |
| 2,501 - 3,600 | 82,106 | 82,517 | 82,929 | 83,344 | 83,760 | 84,179 | 84,600 | 85,023 | 85,448 | 85,876 | As Consumption Growth |
| Over 3,600 | 450,103 | 452,354 | 454,615 | 456,888 | 459,173 | 461,469 | 463,776 | 466,095 | 468,425 | 470,767 | As Consumption Growth |
| ***Total Residential Irrigation Use*** | **1,175,672** | **1,181,550** | **1,187,458** | **1,193,395** | **1,199,362** | **1,205,359** | **1,211,386** | **1,217,443** | **1,223,530** | **1,229,648** | |
| ***Multi-Family*** | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | |
| 0 - 300 | 6,709,116 | 6,742,662 | 6,776,375 | 6,810,257 | 6,844,308 | 6,878,530 | 6,912,922 | 6,947,487 | 6,982,224 | 7,017,135 | As Consumption Growth |
| 301 - 1,000 | 3,186,811 | 3,202,745 | 3,218,759 | 3,234,853 | 3,251,027 | 3,267,282 | 3,283,618 | 3,300,036 | 3,316,537 | 3,333,119 | As Consumption Growth |
| 1,001 - 2,500 | 381,881 | 383,790 | 385,709 | 387,638 | 389,576 | 391,524 | 393,482 | 395,449 | 397,426 | 399,413 | As Consumption Growth |
| Over 2,500 | 134,020 | 134,690 | 135,364 | 136,040 | 136,721 | 137,404 | 138,091 | 138,782 | 139,476 | 140,173 | As Consumption Growth |
| ***June - September*** | | | | | | | | | | | |
| 0 - 300 | 3,799,628 | 3,818,626 | 3,837,719 | 3,856,908 | 3,876,192 | 3,895,573 | 3,915,051 | 3,934,626 | 3,954,300 | 3,974,071 | As Consumption Growth |
| 301 - 1,000 | 3,981,519 | 4,001,427 | 4,021,434 | 4,041,541 | 4,061,749 | 4,082,057 | 4,102,468 | 4,122,980 | 4,143,595 | 4,164,313 | As Consumption Growth |
| 1,001 - 2,500 | 1,218,905 | 1,225,000 | 1,231,125 | 1,237,280 | 1,243,467 | 1,249,684 | 1,255,932 | 1,262,212 | 1,268,523 | 1,274,866 | As Consumption Growth |
| 2,501 - 3,600 | 96,586 | 97,069 | 97,554 | 98,042 | 98,532 | 99,025 | 99,520 | 100,018 | 100,518 | 101,020 | As Consumption Growth |
| Over 3,600 | 97,113 | 97,599 | 98,087 | 98,577 | 99,070 | 99,565 | 100,063 | 100,563 | 101,066 | 101,572 | As Consumption Growth |
| ***Total Multi-Family Use*** | **19,605,579** | **19,703,607** | **19,802,125** | **19,901,136** | **20,000,641** | **20,100,644** | **20,201,148** | **20,302,153** | **20,403,664** | **20,505,682** | |
| ***Commercial*** | | | | | | | | | | | |
| ***Less than 2" Meter*** | | | | | | | | | | | |
| 0 - 2,500 | 6,869,992 | 6,904,342 | 6,938,864 | 6,973,558 | 7,008,426 | 7,043,468 | 7,078,685 | 7,114,079 | 7,149,649 | 7,185,397 | As Consumption Growth |
| Over 2,500 | 3,773,054 | 3,791,919 | 3,810,879 | 3,829,933 | 3,849,083 | 3,868,328 | 3,887,670 | 3,907,108 | 3,926,644 | 3,946,277 | As Consumption Growth |
| ***2" Meter or Larger*** | | | | | | | | | | | |
| 0 - 15,000 | 4,287,691 | 4,309,129 | 4,330,675 | 4,352,328 | 4,374,090 | 4,395,961 | 4,417,940 | 4,440,030 | 4,462,230 | 4,484,541 | As Consumption Growth |
| Over 15,000 | 3,217,668 | 3,233,756 | 3,249,925 | 3,266,175 | 3,282,506 | 3,298,918 | 3,315,413 | 3,331,990 | 3,348,650 | 3,365,393 | As Consumption Growth |
| ***Total Commercial Use*** | **18,148,405** | **18,239,147** | **18,330,343** | **18,421,994** | **18,514,104** | **18,606,675** | **18,699,708** | **18,793,207** | **18,887,173** | **18,981,609** | |

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| | *Current* | *Projected* | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | *FY 2024* | FY 2025 | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FY 2031 | FY 2032 | FY 2033 | *Notes* |
| ***Commercial Irrigation*** | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | |
| Non-Peak Consumption | 1,346,029 | 1,352,759 | 1,359,523 | 1,366,321 | 1,373,152 | 1,380,018 | 1,386,918 | 1,393,853 | 1,400,822 | 1,407,826 | As Consumption Growth |
| ***June - September*** | | | | | | | | | | | |
| Peak Consumption | 4,330,553 | 4,352,206 | 4,373,967 | 4,395,837 | 4,417,816 | 4,439,905 | 4,462,104 | 4,484,415 | 4,506,837 | 4,529,371 | As Consumption Growth |
| ***Total Commercial Irrigation Use*** | **5,676,582** | **5,704,965** | **5,733,490** | **5,762,157** | **5,790,968** | **5,819,923** | **5,849,022** | **5,878,268** | **5,907,659** | **5,937,197** | |
| ***Institutional*** | | | | | | | | | | | |
| All Consumption | 6,162,415 | 6,193,227 | 6,224,193 | 6,255,314 | 6,286,591 | 6,318,024 | 6,349,614 | 6,381,362 | 6,413,269 | 6,445,335 | As Consumption Growth |
| ***Total Institutional Use*** | **6,162,415** | **6,193,227** | **6,224,193** | **6,255,314** | **6,286,591** | **6,318,024** | **6,349,614** | **6,381,362** | **6,413,269** | **6,445,335** | |
| ***Institutional Irrigation*** | | | | | | | | | | | |
| ***October - May*** | | | | | | | | | | | |
| Non-Peak Consumption | 2,949,681 | 2,964,429 | 2,979,252 | 2,994,148 | 3,009,119 | 3,024,164 | 3,039,285 | 3,054,481 | 3,069,754 | 3,085,103 | As Consumption Growth |
| ***June - September*** | | | | | | | | | | | |
| Peak Consumption | 8,817,203 | 8,861,289 | 8,905,595 | 8,950,123 | 8,994,874 | 9,039,848 | 9,085,048 | 9,130,473 | 9,176,125 | 9,222,006 | As Consumption Growth |
| ***Total Institutional Irrigation Use*** | **11,766,884** | **11,825,718** | **11,884,847** | **11,944,271** | **12,003,993** | **12,064,013** | **12,124,333** | **12,184,954** | **12,245,879** | **12,307,108** | |
| ***Total Consumption*** | | | | | | | | | | | |
| Residential | 63,743,577 | 64,062,295 | 64,382,606 | 64,704,519 | 65,028,042 | 65,353,182 | 65,679,948 | 66,008,348 | 66,338,390 | 66,670,082 | |
| Residential Irrigation | 1,175,672 | 1,181,550 | 1,187,458 | 1,193,395 | 1,199,362 | 1,205,359 | 1,211,386 | 1,217,443 | 1,223,530 | 1,229,648 | |
| Multi-Family | 19,605,579 | 19,703,607 | 19,802,125 | 19,901,136 | 20,000,641 | 20,100,644 | 20,201,148 | 20,302,153 | 20,403,664 | 20,505,682 | |
| Commercial | 18,148,405 | 18,239,147 | 18,330,343 | 18,421,994 | 18,514,104 | 18,606,675 | 18,699,708 | 18,793,207 | 18,887,173 | 18,981,609 | |
| Commercial Irrigation | 5,676,582 | 5,704,965 | 5,733,490 | 5,762,157 | 5,790,968 | 5,819,923 | 5,849,022 | 5,878,268 | 5,907,659 | 5,937,197 | |
| Institutional | 6,162,415 | 6,193,227 | 6,224,193 | 6,255,314 | 6,286,591 | 6,318,024 | 6,349,614 | 6,381,362 | 6,413,269 | 6,445,335 | |
| Institutional Irrigation | 11,766,884 | 11,825,718 | 11,884,847 | 11,944,271 | 12,003,993 | 12,064,013 | 12,124,333 | 12,184,954 | 12,245,879 | 12,307,108 | |
| | **126,279,114** | **126,910,510** | **127,545,062** | **128,182,787** | **128,823,701** | **129,467,820** | **130,115,159** | **130,765,735** | **131,419,563** | **132,076,661** | |

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**City of Ashland**
**Water Rate Study**
**Development of Commodity Distribution Factor**
**Exhibit 8**

| | FY 2026 Consumption in CF | 6.36% Unaccounted Water | Net Water Delivered | Average Day Use *(MGD)* | % of Total |
|---|---|---|---|---|---|
| Residential | 64,382,606 | 4,094,734 | 68,477,340 | 1.40 | 50.5% |
| Residential Irrigation | 1,187,458 | 75,522 | 1,262,980 | 0.03 | 0.9% |
| Multi-Family | 19,802,125 | 1,259,415 | 21,061,540 | 0.43 | 15.5% |
| Commercial | 18,330,343 | 1,165,810 | 19,496,153 | 0.40 | 14.4% |
| Commercial Irrigation | 5,733,490 | 364,650 | 6,098,140 | 0.12 | 4.5% |
| Institutional | 6,224,193 | 395,859 | 6,620,052 | 0.14 | 4.9% |
| Institutional Irrigation | 11,884,847 | 755,876 | 12,640,723 | 0.26 | 9.3% |
| Total | **127,545,062** | **8,111,866** | **135,656,928** | **2.78** | **100.0%** |
| | | | ***Actual Production*** [1] | ***2.95*** | ***(COM)*** |

***Notes***

*[1] - Actual production for 6/23 through 5/24 provided by City of Ashland*

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**City of Ashland**
**Water Rate Study**
**Development of Capacity Distribution Factor**
**Exhibit 9**

| | Average Consumption *(MGD)* | Peaking Factors [1] | Peak Day Use *(MGD)* | % of Total |
|---|---|---|---|---|
| Residential | 1.40 | 1.83 | 2.57 | 46.8% |
| Residential Irrigation | 0.03 | 3.06 | 0.08 | 1.4% |
| Multi-Family | 0.43 | 1.63 | 0.70 | 12.8% |
| Commercial | 0.40 | 1.79 | 0.71 | 13.0% |
| Commercial Irrigation | 0.12 | 2.57 | 0.32 | 5.9% |
| Institutional | 0.14 | 2.15 | 0.29 | 5.3% |
| Institutional Irrigation | 0.26 | 3.12 | 0.81 | 14.7% |
| | --- | | --- | --- |
| **Total** | **2.78** | | **5.48** | **100.0%** |
| | | ***Actual Peak Day*** [2] | ***5.85*** | ***(CAP)*** |

***Notes***

*[1] - Developed from peak month to average month*
*[2] - Provided by the City from August 15, 2023*

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**City of Ashland**
**Water Rate Study**
**Development of the Customer Distribution Factor**
**Exhibit 10a**

| | *Actual Customer* | | *Customer Service & Accounting* | | | | *Meters & Services* | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | **Number of Accounts** | **% of Total** | **Number of Customers** | **Weighting Factor** | **Weighted Customer** | **% of Total** | **Number of Customers** | **Weighting Factor [1]** | **Weighted Customer** | **% of Total** |
| Residential | 7,476 | 80.4% | 7,476 | 1.00 | 7,476 | 80.4% | 7,476 | 1.03 | 7,737 | 68.0% |
| Residential Irrigation | 69 | 0.7% | 69 | 1.00 | 69 | 0.7% | 69 | 1.27 | 88 | 0.8% |
| Multi-Family | 692 | 7.4% | 692 | 1.00 | 692 | 7.4% | 692 | 1.66 | 1,147 | 10.1% |
| Commercial | 696 | 7.5% | 696 | 1.00 | 696 | 7.5% | 696 | 1.78 | 1,239 | 10.9% |
| Commercial Irrigation | 177 | 1.9% | 177 | 1.00 | 177 | 1.9% | 177 | 1.66 | 294 | 2.6% |
| Institutional | 84 | 0.9% | 84 | 1.00 | 84 | 0.9% | 84 | 5.56 | 464 | 4.1% |
| Institutional Irrigation | 101 | 1.1% | 101 | 1.00 | 101 | 1.1% | 101 | 4.11 | 415 | 3.6% |
| ***Total*** | **9,294** | **100.0%** | **9,294** | | **9,294** | **100.0%** | **9,294** | | **11,385** | **100.0%** |
| | | ***(AC)*** | | | | ***(WCA)*** | | | | ***(WCMS)*** |

***Notes***

[1] - Based on the AWWA safe operating capacities for water meters by size

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**City of Ashland**
**Water Rate Study**
**Development Of Equivalent Meter Distribution Factor**
**Exhibit 10b**

| | *Number of Meters* | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **0.75"** | **1"** | **1.5"** | **2"** | **3"** | **4"** | **6"** | **8"** | **Total** |
| Residential | 7,138 | 322 | 12 | 4 | 0 | 0 | 0 | 0 | 7,476 |
| Residential Irrigation | 48 | 18 | 3 | 0 | 0 | 0 | 0 | 0 | 69 |
| Multi-Family | 513 | 75 | 54 | 41 | 4 | 4 | 0 | 0 | 692 |
| Commercial | 437 | 134 | 67 | 50 | 5 | 2 | 0 | 0 | 696 |
| Commercial Irrigation | 110 | 43 | 11 | 12 | 1 | 0 | 0 | 0 | 177 |
| Institutional | 19 | 16 | 8 | 25 | 7 | 6 | 1 | 1 | 84 |
| Institutional Irrigation | 27 | 15 | 20 | 28 | 6 | 3 | 1 | 0 | 101 |
| | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ***Total Meters*** | **8,293** | **623** | **176** | **162** | **23** | **15** | **2** | **1** | **9,294** |
| *AWWA Meter Equivalencies* | *1.00* | *1.67* | *3.33* | *5.33* | *10.00* | *16.67* | *33.33* | *53.33* | |

| | *Equivalent Meters* | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | **0.75"** | **1"** | **1.5"** | **2"** | **3"** | **4"** | **6"** | **8"** | **Total** | **Wt Factor** |
| Residential | 7,138 | 537 | 41 | 22 | 0 | 0 | 0 | 0 | 7,737 | 1.03 |
| Residential Irrigation | 48 | 29 | 10 | 0 | 0 | 0 | 0 | 0 | 88 | 1.27 |
| Multi-Family | 513 | 126 | 180 | 221 | 40 | 67 | 0 | 0 | 1,147 | 1.66 |
| Commercial | 437 | 224 | 224 | 269 | 51 | 35 | 0 | 0 | 1,239 | 1.78 |
| Commercial Irrigation | 110 | 72 | 36 | 65 | 11 | 0 | 0 | 0 | 294 | 1.66 |
| Institutional | 19 | 27 | 27 | 135 | 68 | 101 | 34 | 54 | 464 | 5.56 |
| Institutional Irrigation | 27 | 25 | 67 | 151 | 61 | 51 | 34 | 0 | 415 | 4.11 |
| | --- | --- | --- | --- | --- | --- | --- | --- | --- | |
| ***Total Equivalent Meters*** | **8,293** | **1,040** | **585** | **861** | **231** | **254** | **67** | **54** | **11,385** | |

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**City of Ashland**
**Water Rate Study**
**Development of the Public Fire Protection Distribution Factors**
**Exhibit 11**

| | Number of Customers | Fire Prot. Requirements (gals/min) | Duration (minutes) | Total FP Required (1,000 g/min) | % of Total |
|---|---|---|---|---|---|
| Residential | 7,476 | 1,500 | 120 | 1,345,641 | 55.9% |
| Residential Irrigation | 69 | 0 | 0 | 0 | 0.0% |
| Multi-Family | 692 | 2,500 | 180 | 311,227 | 12.9% |
| Commercial | 696 | 4,000 | 240 | 668,313 | 27.8% |
| Commercial Irrigation | 177 | 0 | 0 | 0 | 0.0% |
| Institutional | 84 | 4,000 | 240 | 80,236 | 3.3% |
| Institutional Irrigation | 101 | 0 | 0 | 0 | 0.0% |
| | --- | | | --- | --- |
| ***Total*** | **9,294** | | | **2,405,417** | **100.0%** |
| | | | | | ***(FP )*** |

***Notes***

[1] - Based on the City of Ashland 2020 Water Master Plan, Table 4-10

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**City of Ashland**
**Water Rate Study**
**Development of the Revenue Related Distribution Factor**
**Exhibit 12**

| | Revenue FY 2026 | % of Total |
|---|---|---|
| Residential | $5,094,105 | 58.6% |
| Residential Irrigation | 94,964 | 1.1% |
| Multi-Family | 1,005,682 | 11.6% |
| Commercial | 1,100,652 | 12.7% |
| Commercial Irrigation | 361,760 | 4.2% |
| Institutional | 341,150 | 3.9% |
| Institutional Irrigation | 688,626 | 7.9% |
| | --- | --- |
| ***Total*** | **$8,686,940** | **100.0%** |
| | | ***(RR)*** |

***Notes***

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**City of Ashland**
**Water Rate Study**
**Functionalization and Classification**
**Exhibit 13.1**

| | Plant in Service 7/30/2023 | Commodity (COM) | Capacity (CAP) | Customer Related: Actual Customer (AC) | Customer Related: Weighted for: Cust. Acctg. (WCA) | Customer Related: Weighted for: Meters & Services (WCMS) | Fire Protection (FP) | Revenue Related (RR) | Direct Assign. (DA) | Basis of Classification |
|---|---|---|---|---|---|---|---|---|---|---|
| **Source of Supply** | | | | | | | | | | |
| Land | $956,587 | $487,859 | $468,728 | $0 | $0 | $0 | $0 | $0 | $0 | 51.0% COM 49.0% CAP |
| ***Total Source of Supply*** | **$956,587** | **$487,859** | **$468,728** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | |
| **Transmission & Distribution** | | | | | | | | | | |
| Water Mains/Lines | $12,163,804 | $0 | $3,413,253 | $0 | $0 | $8,122,082 | $628,469 | $0 | $0 | 66.8% WCMS 28.1% CAP 5.2% FP |
| Intertie | 987,060 | 0 | 276,976 | 0 | 0 | 659,085 | 50,999 | 0 | 0 | 66.8% WCMS 28.1% CAP 5.2% FP |
| Pressure Reduction Valves | 3,629 | 0 | 1,018 | 0 | 0 | 2,423 | 188 | 0 | 0 | 66.8% WCMS 28.1% CAP 5.2% FP |
| Tees | 6,591 | 0 | 1,849 | 0 | 0 | 4,401 | 341 | 0 | 0 | 66.8% WCMS 28.1% CAP 5.2% FP |
| Tie-Ins | 1,217 | 0 | 341 | 0 | 0 | 813 | 63 | 0 | 0 | 66.8% WCMS 28.1% CAP 5.2% FP |
| ***Total Transmission & Distribution*** | **$13,162,301** | **$0** | **$3,693,438** | **$0** | **$0** | **$8,788,804** | **$680,059** | **$0** | **$0** | |
| **Storage** | | | | | | | | | | |
| Reservoirs | $749,179 | $0 | $333,862 | $0 | $0 | $0 | $415,317 | $0 | $0 | 44.6% CAP 55.4% FP |
| Dam | 231,307 | 0 | 103,079 | 0 | 0 | 0 | 128,228 | 0 | 0 | 44.6% CAP 55.4% FP |
| ***Total Storage*** | **$980,486** | **$0** | **$436,941** | **$0** | **$0** | **$0** | **$543,545** | **$0** | **$0** | |
| **Pumping** | | | | | | | | | | |
| Pump Stations | $3,503,882 | $1,786,980 | $1,716,902 | $0 | $0 | $0 | $0 | $0 | $0 | 51.0% COM 49.0% CAP |
| ***Total Pumping*** | **$3,503,882** | **$1,786,980** | **$1,716,902** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | |
| **Meters & Services** | $29,589 | $0 | $0 | $0 | $0 | $29,589 | $0 | $0 | $0 | 100.0% WCMS |
| ***Total Meters & Services*** | **$29,589** | **$0** | **$0** | **$0** | **$0** | **$29,589** | **$0** | **$0** | **$0** | |
| **Water Treatment** | | | | | | | | | | |
| Water Treatment Plant | $1,375,344 | $701,425 | $673,919 | $0 | $0 | $0 | $0 | $0 | $0 | 51.0% COM 49.0% CAP |
| ***Total Water Treatment*** | **$1,375,344** | **$701,425** | **$673,919** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | |
| **Hydrants** | $24,800 | $0 | $0 | $0 | $0 | $0 | $24,800 | $0 | $0 | 100.0% FP |
| ***Total Hydrants*** | **$24,800** | **$0** | **$0** | **$0** | **$0** | **$0** | **$24,800** | **$0** | **$0** | |
| ***Total Plant Before General*** | **$20,032,989** | **$2,976,265** | **$6,989,928** | **$0** | **$0** | **$8,818,393** | **$1,248,403** | **$0** | **$0** | |
| *% of Total Plant* | *100.0%* | *14.9%* | *34.9%* | *0.0%* | *0.0%* | *44.0%* | *6.2%* | *0.0%* | *0.0%* | |
| **General Plant** | | | | | | | | | | |
| Ashland Airport | $4,659 | $692 | $1,625 | $0 | $0 | $2,051 | $290 | $0 | $0 | As Plant Before General |
| B Street Pavement Overlay | 11,405 | 1,694 | 3,980 | 0 | 0 | 5,021 | 711 | 0 | 0 | As Plant Before General |
| Studies/Projects | 100,536 | 14,936 | 35,079 | 0 | 0 | 44,255 | 6,265 | 0 | 0 | As Plant Before General |
| Hosler Dam Security | 94,467 | 14,035 | 32,961 | 0 | 0 | 41,584 | 5,887 | 0 | 0 | As Plant Before General |
| Equipment | 3,424 | 509 | 1,195 | 0 | 0 | 1,507 | 213 | 0 | 0 | As Plant Before General |
| ***Total General Plant*** | **$214,490** | **$31,866** | **$74,840** | **$0** | **$0** | **$94,417** | **$13,366** | **$0** | **$0** | |
| **Net Plant In Service** | **$20,247,479** | **$3,008,131** | **$7,064,768** | **$0** | **$0** | **$8,912,810** | **$1,261,770** | **$0** | **$0** | |

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**City of Ashland**
**Water Rate Study**
**Distribution, Storage, and Fire Analysis**
**Exhibit 14**

***Fire Protection Analysis*** [1]

| | Capacity (MG) | Fire Related % | Fire Capacity (Gal) |
|---|---|---|---|
| Crowson Reservoir | 2,100,000 | 35.8% | 752,239 |
| Granite Reservoir | 2,000,000 | 30.7% | 613,419 |
| Alsing Reservoir | 2,100,000 | 91.4% | 1,920,000 |
| Fallon Reservoir | 500,000 | 85.7% | 428,571 |
| | --- | | --- |
| | **6,700,000** | | **3,714,229** |
| % Public Fire Protection | | | 55.4% |
| % Capacity | | | 44.6% |
| Average Day | 2.78 | COM | 51.0% |
| Peak Day | 5.48 | (1 - COM) = CAP | 49.0% |

***Distribution Main Analysis***

| | Main Size (Inch) | Length (Feet) | Replacement Cost ($) | Total |
|---|---|---|---|---|
| *Distribution* | 4 or smaller | 106,911 | $75.00 | $8,018,325 |
| | 6 | 213,163 | 100.00 | 21,316,300 |
| | 8 | 182,368 | 125.00 | 22,796,000 |
| | 10 | 16,195 | 150.00 | 2,429,250 |
| | 12 | 58,940 | 175.00 | 10,314,500 |
| *Transmission* | 14 | 2,055 | 200.00 | 411,000 |
| | 16 | 27,294 | 225.00 | 6,141,150 |
| | 18 | 88 | 250.00 | 22,000 |
| | 20 | 3,419 | 275.00 | 940,225 |
| | 24 | 12,217 | 300.00 | 3,665,100 |
| | 30 | 4,662 | 325.00 | 1,515,150 |
| | | --- | | --- |
| | | **577,577** | | **$64,874,375** |

| | | |
|---|---|---|
| **Customer** | | **66.8%** |
| (1) Total @ 2" Equiv *($75)* | $43,318,275 | |
| **Capacity** | | **28.1%** |
| (2) Cost for 4 - 8" | $52,130,625 | |
| (3) Equiv 8" for 10" & > | $9,391,875 | |
| **Fire** | | **5.2%** |

***Notes***

[1] - 2020 Water Master Plan Update Table 5-4

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| | FY 2026 | Commodity (COM) | Capacity (CAP) | Customer Related: Actual Customer (AC) | Customer Related: Weighted for: Cust. Acctg. (WCA) | Customer Related: Weighted for: Meters & Services (WCMS) | Public Fire Protection (FP) | Revenue Related (RR) | Direct Assign. (DA) | Basis of Classification | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Water Conservation** | | | | | | | | | | | |
| Regular Employees | $68,111 | $0 | $68,111 | $0 | $0 | $0 | $0 | $0 | $0 | 100.0% | CAP |
| Sick Leave Pay Out | 418 | 0 | 418 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Vacation Pay Out | 157 | 0 | 157 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Scheduled Overtime | 2,120 | 0 | 2,120 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| FICA/MEDICARE Contributions | 5,341 | 0 | 5,341 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Employer's Share | 5,922 | 0 | 5,922 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Employer's UAL Share | 9,993 | 0 | 9,993 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Employee Share Paid by Cty/Pks | 4,248 | 0 | 4,248 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| HRAVEBA | 2,094 | 0 | 2,094 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Deferred Comp | 627 | 0 | 627 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Other Benefits | 73 | 0 | 73 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Group Health Insurance | 31,970 | 0 | 31,970 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Worker's Compensation | 108 | 0 | 108 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Office Supplies | 1,035 | 0 | 1,035 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Small Tools & Ops Supplies | 104 | 0 | 104 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Uniforms - Clothing | 78 | 0 | 78 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Meeting Supplies | 104 | 0 | 104 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Books & Periodicals | 104 | 0 | 104 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Fuel | 311 | 0 | 311 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Communications | 530 | 0 | 530 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Postage | 52 | 0 | 52 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Professional Services | 1,590 | 0 | 1,590 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Internal Chg - Administrative | 37,937 | 0 | 0 | 37,937 | 0 | 0 | 0 | 0 | 0 | 100.0% | AC |
| Internal Chg - Insurance Svc | 4,560 | 0 | 4,560 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Internal Chg - Facility Use | 17,910 | 0 | 17,910 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Internal Chg - Fleet Maint | 978 | 0 | 978 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Internal Chg - Equip Replacmnt | 5,782 | 0 | 5,782 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Advertising | 4,240 | 0 | 4,240 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Air | 420 | 0 | 420 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Personal Vehicle Mileage | 518 | 0 | 518 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Lodging | 1,035 | 0 | 1,035 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Meals | 362 | 0 | 362 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Training | 1,035 | 0 | 1,035 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Dues | 3,726 | 0 | 3,726 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| Conservation Programs - City | 98,273 | 0 | 98,273 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% | CAP |
| ***Total Water Conservation*** | **$311,865** | **$0** | **$273,928** | **$37,937** | **$0** | **$0** | **$0** | **$0** | **$0** | | |
| **Water Supply** | | | | | | | | | | | |
| Meeting Supplies | $260 | $132 | $127 | $0 | $0 | $0 | $0 | $0 | $0 | As Source of Supply | |
| Infrastructure | 15,676 | 7,995 | 7,681 | 0 | 0 | 0 | 0 | 0 | 0 | As Source of Supply | |
| Professional Services | 371,000 | 189,210 | 181,790 | 0 | 0 | 0 | 0 | 0 | 0 | As Source of Supply | |
| Internal Chg - Administrative | 167,857 | 85,607 | 82,250 | 0 | 0 | 0 | 0 | 0 | 0 | As Source of Supply | |
| Water | 285,169 | 145,436 | 139,733 | 0 | 0 | 0 | 0 | 0 | 0 | As Source of Supply | |
| ***Total Water Supply*** | **$839,962** | **$428,381** | **$411,581** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | | |

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| | FY 2026 | Commodity (COM) | Capacity (CAP) | Customer Related: Actual Customer (AC) | Customer Related: Weighted for: Cust. Acctg. (WCA) | Customer Related: Weighted for: Meters & Services (WCMS) | Public Fire Protection (FP) | Revenue Related (RR) | Direct Assign. (DA) | Basis of Classification |
|---|---|---|---|---|---|---|---|---|---|---|
| **Water Distribution** | | | | | | | | | | |
| Regular Employees | $884,197 | $0 | $248,112 | $0 | $0 | $590,401 | $45,684 | $0 | $0 | As T&D |
| Sick Leave Pay Out | 4,240 | 0 | 1,190 | 0 | 0 | 2,831 | 219 | 0 | 0 | As T&D |
| Vacation Pay Out | 2,385 | 0 | 669 | 0 | 0 | 1,593 | 123 | 0 | 0 | As T&D |
| Scheduled Overtime | 63,600 | 0 | 17,847 | 0 | 0 | 42,467 | 3,286 | 0 | 0 | As T&D |
| Duty Pay | 19,080 | 0 | 5,354 | 0 | 0 | 12,740 | 986 | 0 | 0 | As T&D |
| FICA/MEDICARE Contributions | 73,419 | 0 | 20,602 | 0 | 0 | 49,023 | 3,793 | 0 | 0 | As T&D |
| Employer's Share | 94,360 | 0 | 26,478 | 0 | 0 | 63,007 | 4,875 | 0 | 0 | As T&D |
| Employer's UAL Share | 137,241 | 0 | 38,511 | 0 | 0 | 91,639 | 7,091 | 0 | 0 | As T&D |
| Employee Share Paid by Cty/Pks | 57,584 | 0 | 16,158 | 0 | 0 | 38,450 | 2,975 | 0 | 0 | As T&D |
| HRAVEBA | 28,792 | 0 | 8,079 | 0 | 0 | 19,225 | 1,488 | 0 | 0 | As T&D |
| Deferred Comp | 7,681 | 0 | 2,155 | 0 | 0 | 5,129 | 397 | 0 | 0 | As T&D |
| Group Health Insurance | 355,875 | 0 | 99,861 | 0 | 0 | 237,627 | 18,387 | 0 | 0 | As T&D |
| Worker's Compensation | 16,635 | 0 | 4,668 | 0 | 0 | 11,108 | 860 | 0 | 0 | As T&D |
| Office Supplies | 3,105 | 0 | 871 | 0 | 0 | 2,073 | 160 | 0 | 0 | As T&D |
| Small Tools & Ops Supplies | 13,455 | 0 | 3,776 | 0 | 0 | 8,984 | 695 | 0 | 0 | As T&D |
| Uniforms - Clothing | 4,658 | 0 | 1,307 | 0 | 0 | 3,110 | 241 | 0 | 0 | As T&D |
| Technical Supplies | 36,225 | 0 | 10,165 | 0 | 0 | 24,188 | 1,872 | 0 | 0 | As T&D |
| Chemicals | 5,693 | 0 | 1,597 | 0 | 0 | 3,801 | 294 | 0 | 0 | As T&D |
| County Services | 5,300 | 0 | 1,487 | 0 | 0 | 3,539 | 274 | 0 | 0 | As T&D |
| Books & Periodicals | 207 | 0 | 58 | 0 | 0 | 138 | 11 | 0 | 0 | As T&D |
| Fuel | 31,500 | 0 | 8,839 | 0 | 0 | 21,033 | 1,628 | 0 | 0 | As T&D |
| Rental Charges | 3,135 | 0 | 880 | 0 | 0 | 2,093 | 162 | 0 | 0 | As T&D |
| Natural Gas | 2,520 | 0 | 707 | 0 | 0 | 1,683 | 130 | 0 | 0 | As T&D |
| Electricity | 63,000 | 0 | 17,678 | 0 | 0 | 42,067 | 3,255 | 0 | 0 | As T&D |
| Water | 1,575 | 0 | 442 | 0 | 0 | 1,052 | 81 | 0 | 0 | As T&D |
| Wastewater & Other | 137 | 0 | 38 | 0 | 0 | 91 | 7 | 0 | 0 | As T&D |
| Disposal & Sanitary Service | 1,050 | 0 | 295 | 0 | 0 | 701 | 54 | 0 | 0 | As T&D |
| Infrastructure | 219,450 | 0 | 61,579 | 0 | 0 | 146,532 | 11,338 | 0 | 0 | As T&D |
| Communications | 9,487 | 0 | 2,662 | 0 | 0 | 6,335 | 490 | 0 | 0 | As T&D |
| Computers | 3,135 | 0 | 880 | 0 | 0 | 2,093 | 162 | 0 | 0 | As T&D |
| Postage | 2,070 | 0 | 581 | 0 | 0 | 1,382 | 107 | 0 | 0 | As T&D |
| Radios | 1,045 | 0 | 293 | 0 | 0 | 698 | 54 | 0 | 0 | As T&D |
| Professional Services | 56,180 | 0 | 15,765 | 0 | 0 | 37,513 | 2,903 | 0 | 0 | As T&D |
| Bad Debt Expense | 51,750 | 0 | 14,521 | 0 | 0 | 34,555 | 2,674 | 0 | 0 | As T&D |
| Senior Discount | 34,280 | 0 | 9,619 | 0 | 0 | 22,889 | 1,771 | 0 | 0 | As T&D |
| Licensing | 25,875 | 0 | 7,261 | 0 | 0 | 17,277 | 1,337 | 0 | 0 | As T&D |
| Internal Chg - Administrative | 952,097 | 0 | 0 | 952,097 | 0 | 0 | 0 | 0 | 0 | 100.0% AC |
| Internal Chg - Insurance Svc | 82,925 | 0 | 23,269 | 0 | 0 | 55,371 | 4,285 | 0 | 0 | As T&D |
| Internal Chg - Tech Debt | 51,750 | 0 | 14,521 | 0 | 0 | 34,555 | 2,674 | 0 | 0 | As T&D |
| Internal Chg - Facility Use | 120,191 | 0 | 33,726 | 0 | 0 | 80,254 | 6,210 | 0 | 0 | As T&D |
| Internal Chg - Fleet Maint | 113,046 | 0 | 31,722 | 0 | 0 | 75,484 | 5,841 | 0 | 0 | As T&D |
| Internal Chg - Equip Replacmnt | 222,300 | 0 | 62,379 | 0 | 0 | 148,435 | 11,486 | 0 | 0 | As T&D |
| Air | 3,150 | 0 | 884 | 0 | 0 | 2,103 | 163 | 0 | 0 | As T&D |
| Personal Vehicle Mileage | 362 | 0 | 102 | 0 | 0 | 242 | 19 | 0 | 0 | As T&D |
| Lodging | 2,588 | 0 | 726 | 0 | 0 | 1,728 | 134 | 0 | 0 | As T&D |
| Meals | 362 | 0 | 102 | 0 | 0 | 242 | 19 | 0 | 0 | As T&D |
| Training | 5,175 | 0 | 1,452 | 0 | 0 | 3,455 | 267 | 0 | 0 | As T&D |
| Dues | 2,070 | 0 | 581 | 0 | 0 | 1,382 | 107 | 0 | 0 | As T&D |
| Medical & Laboratory | 25,875 | 0 | 7,261 | 0 | 0 | 17,277 | 1,337 | 0 | 0 | As T&D |
| Equipment | 5,225 | 0 | 1,466 | 0 | 0 | 3,489 | 270 | 0 | 0 | As T&D |
| ***Total Water Distribution*** | **$3,907,033** | **$0** | **$829,177** | **$952,097** | **$0** | **$1,973,087** | **$152,673** | **$0** | **$0** | |

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| | FY 2026 | Commodity (COM) | Capacity (CAP) | Customer Related: Actual Customer (AC) | Customer Related: Weighted for: Cust. Acctg. (WCA) | Customer Related: Weighted for: Meters & Services (WCMS) | Public Fire Protection (FP) | Revenue Related (RR) | Direct Assign. (DA) | Basis of Classification |
|---|---|---|---|---|---|---|---|---|---|---|
| **Water Treatment** | | | | | | | | | | |
| Regular Employees | $561,343 | $286,285 | $275,058 | $0 | $0 | $0 | $0 | $0 | $0 | As Water Treatment |
| Sick Leave Pay Out | 954 | 487 | 467 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Vacation Pay Out | 530 | 270 | 260 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Scheduled Overtime | 23,320 | 11,893 | 11,427 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Duty Pay | 18,762 | 9,569 | 9,193 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| FICA/MEDICARE Contributions | 45,621 | 23,266 | 22,354 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Employer's Share | 59,308 | 30,247 | 29,061 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Employer's UAL Share | 85,289 | 43,497 | 41,791 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Employee Share Paid by Cty/Pks | 35,781 | 18,248 | 17,533 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| HRAVEBA | 17,890 | 9,124 | 8,766 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Deferred Comp | 3,919 | 1,999 | 1,920 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Other Benefits | 73 | 37 | 36 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Group Health Insurance | 199,813 | 101,904 | 97,908 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Worker's Compensation | 7,681 | 3,917 | 3,764 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Office Supplies | 2,070 | 1,056 | 1,014 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Small Tools & Ops Supplies | 1,656 | 845 | 811 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Uniforms - Clothing | 2,795 | 1,425 | 1,369 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Technical Supplies | 51,750 | 26,393 | 25,358 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Chemicals | 248,063 | 126,512 | 121,551 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Books & Periodicals | 155 | 79 | 76 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Fuel | 5,775 | 2,945 | 2,830 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Building Maintenance | 1,590 | 811 | 779 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Electricity | 44,100 | 22,491 | 21,609 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Custodial | 1,378 | 703 | 675 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Grounds Care | 7,950 | 4,055 | 3,896 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Infrastructure | 209,000 | 106,590 | 102,410 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Communications | 5,300 | 2,703 | 2,597 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Computers | 1,045 | 533 | 512 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Postage | 621 | 317 | 304 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Radios | 105 | 53 | 51 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Professional Services | 15,900 | 8,109 | 7,791 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Licensing | 10,868 | 5,542 | 5,325 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Internal Chg - Administrative | 214,513 | 0 | 0 | 214,513 | 0 | 0 | 0 | 0 | 0 | 100.0% AC |
| Internal Chg - Insurance Svc | 38,596 | 19,684 | 18,912 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Internal Chg - Tech Debt | 29,187 | 14,885 | 14,302 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Internal Chg - Facility Use | 33,689 | 17,181 | 16,507 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Internal Chg - Fleet Maint | 8,644 | 4,409 | 4,236 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Internal Chg - Equip Replacmnt | 20,591 | 10,501 | 10,089 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Personal Vehicle Mileage | 621 | 317 | 304 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Lodging | 2,588 | 1,320 | 1,268 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Meals | 1,035 | 528 | 507 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Training | 3,105 | 1,584 | 1,521 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Dues | 1,035 | 528 | 507 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Medical & Laboratory | 20,700 | 10,557 | 10,143 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Equipment | 2,090 | 1,066 | 1,024 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| ***Total Water Treatment*** | **$2,046,795** | **$934,464** | **$897,818** | **$214,513** | **$0** | **$0** | **$0** | **$0** | **$0** | |

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| | FY 2026 | Commodity (COM) | Capacity (CAP) | Customer Related: Actual Customer (AC) | Customer Related: Weighted for: Cust. Acctg. (WCA) | Customer Related: Weighted for: Meters & Services (WCMS) | Public Fire Protection (FP) | Revenue Related (RR) | Direct Assign. (DA) | Basis of Classification |
|---|---|---|---|---|---|---|---|---|---|---|
| Additional Staffing | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | As Net Plant |
| **Total Operations & Maintenance** | **$7,105,656** | **$1,362,845** | **$2,412,505** | **$1,204,546** | **$0** | **$1,973,087** | **$152,673** | **$0** | **$0** | |
| **Taxes & Transfers** | | | | | | | | | | |
| Franchise Tax | $694,955 | $0 | $0 | $694,955 | $0 | $0 | $0 | $0 | $0 | 100.0% AC |
| Ashland Forest Resiliency - General Fund | 51,750 | 0 | 0 | 51,750 | 0 | 0 | 0 | 0 | 0 | 100.0% AC |
| Contingency | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% AC |
| ***Total Taxes & Transfers*** | **$746,705** | **$0** | **$0** | **$746,705** | **$0** | **$0** | **$0** | **$0** | **$0** | |
| **Rate Funded Capital** | **$2,000,000** | **$297,136** | **$697,842** | **$0** | **$0** | **$880,387** | **$124,635** | **$0** | **$0** | As Net Plant |
| **Debt Service** | | | | | | | | | | |
| 2013 New Construction Debt - Water | $196,469 | $29,189 | $68,552 | $0 | $0 | $86,484 | $12,243 | $0 | $0 | As Net Plant |
| IFA DEQ S14005 | 136,207 | 20,236 | 47,526 | 0 | 0 | 59,958 | 8,488 | 0 | 0 | As Net Plant |
| WTP S16021 | 394,099 | 200,990 | 193,108 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| WIFIA Loan | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| Dam Safety Improvements | 332,800 | 169,728 | 163,072 | 0 | 0 | 0 | 0 | 0 | 0 | As Source of Supply |
| Medford Water Commission Loan | 163,756 | 83,515 | 80,240 | 0 | 0 | 0 | 0 | 0 | 0 | As Source of Supply |
| Additional Long-Term Debt | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | As Net Plant |
| ***Total Debt Service*** | **$1,223,331** | **$503,659** | **$552,498** | **$0** | **$0** | **$146,442** | **$20,732** | **$0** | **$0** | |
| *LESS: SDC Revenue* | $163,756 | $83,515 | $80,240 | $0 | $0 | $0 | $0 | $0 | $0 | As Source of Supply |
| *LESS: SDC Revenue - WTP* | $772,966 | 394,212 | 378,753 | 0 | 0 | 0 | 0 | 0 | 0 | As Water Treatment |
| ***Net Debt Service*** | **$286,609** | **$25,931** | **$93,505** | **$0** | **$0** | **$146,442** | **$20,732** | **$0** | **$0** | |
| **Reserve Funding** | | | | | | | | | | |
| Unrestricted Reserves | $14,925 | $14,925 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | 100.0% COM |
| WTP Sinking Fund | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% COM |
| SDCs Reserve | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100.0% COM |
| ***Total Reserve Funding*** | **$14,925** | **$14,925** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | |
| **Total Revenue Requirement** | **$10,153,895** | **$1,700,837** | **$3,203,851** | **$1,951,252** | **$0** | **$2,999,916** | **$298,039** | **$0** | **$0** | |
| ***Less: Other Revenues*** | | | | | | | | | | |
| Miscellaneous Services | $40,200 | $6,734 | $12,684 | $7,725 | $0 | $11,877 | $1,180 | $0 | $0 | As Rev Req |
| Miscellaneous Income | 26,130 | 4,377 | 8,245 | 5,021 | 0 | 7,720 | 767 | 0 | 0 | As Rev Req |
| Interest Income | 264,508 | 44,307 | 83,460 | 50,830 | 0 | 78,148 | 7,764 | 0 | 0 | As Rev Req |
| New Service Installation | 50,250 | 8,417 | 15,855 | 9,656 | 0 | 14,846 | 1,475 | 0 | 0 | As Rev Req |
| *Total Other Revenues* | **$381,088** | **$63,835** | **$120,244** | **$73,233** | **$0** | **$112,591** | **$11,186** | **$0** | **$0** | |
| **Total Net Revenue Requirement** | **$9,772,807** | **$1,637,003** | **$3,083,607** | **$1,878,019** | **$0** | **$2,887,325** | **$286,854** | **$0** | **$0** | |

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**City of Ashland**
**Water Rate Study**
**Distribution of Revenue Requirement**
**Exhibit 16**

| | Total Net Revenue Requirement | Residential | Residential Irrigation | Multi-Family | Commercial | Commercial Irrigation | Institutional | Institutional Irrigation | *Basis of Allocation* |
|---|---|---|---|---|---|---|---|---|---|
| **Commodity** | **$1,637,003** | $826,331 | $15,241 | $254,154 | $235,264 | $73,588 | $79,886 | $152,538 | *(COM)* |
| **Capacity** | **$3,083,607** | $1,444,271 | $44,525 | $394,519 | $401,590 | $180,635 | $163,904 | $454,164 | *(CAP)* |
| **Actual Customer** | **$1,878,019** | $1,510,575 | $13,912 | $139,749 | $140,668 | $35,817 | $16,888 | $20,409 | *(AC)* |
| **Cust. Acctg.** | **$0** | $0 | $0 | $0 | $0 | $0 | $0 | $0 | *(WCA)* |
| **Meters & Services** | **$2,887,325** | $1,962,220 | $22,241 | $290,818 | $314,299 | $74,635 | $117,776 | $105,337 | *(WCMS)* |
| **Public Fire Protection** | **$286,854** | $160,472 | $0 | $37,115 | $79,698 | $0 | $9,568 | $0 | *(FP)* |
| **Revenue Related** | **$0** | $0 | $0 | $0 | $0 | $0 | $0 | $0 | *(RR)* |
| **Direct Assign.** | **$0** | $0 | $0 | $0 | $0 | $0 | $0 | $0 | *(DA)* |
| **Net Revenue Requirement** | **$9,772,807** | **$5,903,869** | **$95,918** | **$1,116,355** | **$1,171,519** | **$364,675** | **$388,022** | **$732,449** | |

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**City of Ashland**
**Water Rate Study**
**Summary of Cost of Service Analysis**
**Exhibit 17**

| | FY 2026 | Residential | Residential Irrigation | Multi-Family | Commercial | Commercial Irrigation | Institutional | Institutional Irrigation | *Notes* |
|---|---|---|---|---|---|---|---|---|---|
| **Revenues at Present Rates** | $8,686,940 | $5,094,105 | $94,964 | $1,005,682 | $1,100,652 | $361,760 | $341,150 | $688,626 | |
| **Allocated Revenue Requirement** | $9,772,807 | $5,903,869 | $95,918 | $1,116,355 | $1,171,519 | $364,675 | $388,022 | $732,449 | |
| Bal/Def of Funds | ($1,085,867) | ($809,764) | ($954) | ($110,672) | ($70,867) | ($2,915) | ($46,871) | ($43,823) | |
| Additional Franchise Tax | (86,869) | (64,781) | (76) | (8,854) | (5,669) | (233) | (3,750) | (3,506) | |
| ***Total Bal / Def of Funds*** | **($1,172,737)** | **($874,545)** | **($1,030)** | **($119,526)** | **($76,537)** | **($3,149)** | **($50,621)** | **($47,329)** | |
| **Required % Change in Rates** | **13.5%** | **17.2%** | **1.1%** | **11.9%** | **7.0%** | **0.9%** | **14.8%** | **6.9%** | |

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| | | | | Off-Peak | | Wholesale Rate | | |
|---|---|---|---|---|---|---|---|---|
| | FY 2026 | Peak | Off-Peak | *cf* | *1,000 gal* | *cf* | *1,000 gal* | Notes |
| **Water Conservation** | | | | | | | | |
| Regular Employees | $68,111 | $35,063 | $33,049 | $0.0003 | $0.03 | $0.0000 | $0.00 | |
| Sick Leave Pay Out | 418 | 215 | 203 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Vacation Pay Out | 157 | 81 | 76 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Scheduled Overtime | 2,120 | 1,091 | 1,029 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| FICA/MEDICARE Contributions | 5,341 | 2,749 | 2,592 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Employer's Share | 5,922 | 3,049 | 2,873 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Employer's UAL Share | 9,993 | 5,144 | 4,849 | 0.0000 | 0.01 | 0.0000 | 0.00 | |
| Employee Share Paid by Cty/Pks | 4,248 | 2,187 | 2,061 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| HRAVEBA | 2,094 | 1,078 | 1,016 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Deferred Comp | 627 | 323 | 304 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Other Benefits | 73 | 38 | 35 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Group Health Insurance | 31,970 | 16,458 | 15,512 | 0.0001 | 0.02 | 0.0000 | 0.00 | |
| Worker's Compensation | 108 | 56 | 52 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Office Supplies | 1,035 | 533 | 502 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Small Tools & Ops Supplies | 104 | 53 | 50 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Uniforms - Clothing | 78 | 40 | 38 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Meeting Supplies | 104 | 53 | 50 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Books & Periodicals | 104 | 53 | 50 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Fuel | 311 | 160 | 151 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Communications | 530 | 273 | 257 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Postage | 52 | 27 | 25 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Professional Services | 1,590 | 819 | 771 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Internal Chg - Administrative | 37,937 | 19,529 | 18,408 | 0.0001 | 0.02 | 0.0000 | 0.00 | |
| Internal Chg - Insurance Svc | 4,560 | 2,347 | 2,212 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Internal Chg - Facility Use | 17,910 | 9,220 | 8,690 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Internal Chg - Fleet Maint | 978 | 504 | 475 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Internal Chg - Equip Replacmnt | 5,782 | 2,976 | 2,806 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Advertising | 4,240 | 2,183 | 2,057 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Air | 420 | 216 | 204 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Personal Vehicle Mileage | 518 | 266 | 251 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Lodging | 1,035 | 533 | 502 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Meals | 362 | 186 | 176 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Training | 1,035 | 533 | 502 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Dues | 3,726 | 1,918 | 1,808 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Conservation Programs - City | 98,273 | 50,589 | 47,684 | 0.0004 | 0.05 | 0.0000 | 0.00 | |
| ***Total Water Conservation*** | **$311,865** | **$160,543** | **$151,322** | **$0.0012** | **$0.16** | **$0.0000** | **$0.00** | |
| **Water Supply** | | | | | | | | |
| Meeting Supplies | $260 | $134 | $126 | $0.0000 | $0.00 | $0.0000 | $0.00 | |
| Infrastructure | 15,676 | 8,070 | 7,606 | 0.0001 | 0.01 | 0.0000 | 0.01 | |
| Professional Services | 371,000 | 190,984 | 180,016 | 0.0014 | 0.19 | 0.0000 | 0.00 | |
| Internal Chg - Administrative | 167,857 | 86,410 | 81,447 | 0.0006 | 0.09 | 0.0000 | 0.00 | |
| Water | 285,169 | 146,800 | 138,369 | 0.0011 | 0.15 | 0.0000 | 0.00 | |
| ***Total Water Supply*** | **$839,962** | **$432,398** | **$407,564** | **$0.0032** | **$0.43** | **$0.0000** | **$0.01** | |

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| | | | | Off-Peak | | Wholesale Rate | | |
|---|---|---|---|---|---|---|---|---|
| | **FY 2026** | **Peak** | **Off-Peak** | ***cf*** | ***1,000 gal*** | ***cf*** | ***1,000 gal*** | **Notes** |
| **Water Distribution** | | | | | | | | |
| Regular Employees | $884,197 | $455,169 | $429,028 | $0.0034 | $0.45 | $0.0000 | $0.00 | |
| Sick Leave Pay Out | 4,240 | 2,183 | 2,057 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Vacation Pay Out | 2,385 | 1,228 | 1,157 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Scheduled Overtime | 63,600 | 32,740 | 30,860 | 0.0002 | 0.03 | 0.0000 | 0.00 | |
| Duty Pay | 19,080 | 9,822 | 9,258 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| FICA/MEDICARE Contributions | 73,419 | 37,795 | 35,624 | 0.0003 | 0.04 | 0.0000 | 0.00 | |
| Employer's Share | 94,360 | 48,575 | 45,785 | 0.0004 | 0.05 | 0.0000 | 0.00 | |
| Employer's UAL Share | 137,241 | 70,649 | 66,592 | 0.0005 | 0.07 | 0.0000 | 0.00 | |
| Employee Share Paid by Cty/Pks | 57,584 | 29,643 | 27,941 | 0.0002 | 0.03 | 0.0000 | 0.00 | |
| HRAVEBA | 28,792 | 14,822 | 13,970 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Deferred Comp | 7,681 | 3,954 | 3,727 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Group Health Insurance | 355,875 | 183,198 | 172,677 | 0.0014 | 0.18 | 0.0000 | 0.00 | |
| Worker's Compensation | 16,635 | 8,564 | 8,072 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Office Supplies | 3,105 | 1,598 | 1,507 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Small Tools & Ops Supplies | 13,455 | 6,926 | 6,529 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Uniforms - Clothing | 4,658 | 2,398 | 2,260 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Technical Supplies | 36,225 | 18,648 | 17,577 | 0.0001 | 0.02 | 0.0000 | 0.00 | |
| Chemicals | 5,693 | 2,930 | 2,762 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| County Services | 5,300 | 2,728 | 2,572 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Books & Periodicals | 207 | 107 | 100 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Fuel | 31,500 | 16,216 | 15,284 | 0.0001 | 0.02 | 0.0000 | 0.00 | |
| Rental Charges | 3,135 | 1,614 | 1,521 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Natural Gas | 2,520 | 1,297 | 1,223 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Electricity | 63,000 | 32,431 | 30,569 | 0.0002 | 0.03 | 0.0000 | 0.00 | |
| Water | 1,575 | 811 | 764 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Wastewater & Other | 137 | 70 | 66 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Disposal & Sanitary Service | 1,050 | 541 | 509 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Infrastructure | 219,450 | 112,969 | 106,481 | 0.0008 | 0.11 | 0.0000 | 0.00 | |
| Communications | 9,487 | 4,884 | 4,603 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Computers | 3,135 | 1,614 | 1,521 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Postage | 2,070 | 1,066 | 1,004 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Radios | 1,045 | 538 | 507 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Professional Services | 56,180 | 28,920 | 27,260 | 0.0002 | 0.03 | 0.0000 | 0.00 | |
| Bad Debt Expense | 51,750 | 26,640 | 25,110 | 0.0002 | 0.03 | 0.0000 | 0.00 | |
| Senior Discount | 34,280 | 17,647 | 16,633 | 0.0001 | 0.02 | 0.0000 | 0.00 | |
| Licensing | 25,875 | 13,320 | 12,555 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Internal Chg - Administrative | 952,097 | 490,123 | 461,974 | 0.0036 | 0.48 | 0.0000 | 0.00 | |
| Internal Chg - Insurance Svc | 82,925 | 42,689 | 40,237 | 0.0003 | 0.04 | 0.0000 | 0.00 | |
| Internal Chg - Tech Debt | 51,750 | 26,640 | 25,110 | 0.0002 | 0.03 | 0.0000 | 0.00 | |
| Internal Chg - Facility Use | 120,191 | 61,872 | 58,319 | 0.0005 | 0.06 | 0.0000 | 0.00 | |
| Internal Chg - Fleet Maint | 113,046 | 58,194 | 54,852 | 0.0004 | 0.06 | 0.0000 | 0.00 | |
| Internal Chg - Equip Replacmnt | 222,300 | 114,436 | 107,864 | 0.0008 | 0.11 | 0.0000 | 0.00 | |
| Air | 3,150 | 1,622 | 1,528 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Personal Vehicle Mileage | 362 | 186 | 176 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Lodging | 2,588 | 1,332 | 1,256 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Meals | 362 | 186 | 176 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Training | 5,175 | 2,664 | 2,511 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Dues | 2,070 | 1,066 | 1,004 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Medical & Laboratory | 25,875 | 13,320 | 12,555 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Equipment | 5,225 | 2,690 | 2,535 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| ***Transmission (16.4%)*** | 639,409 | 329,157 | 310,253 | $0.0024 | $0.33 | $0.0024 | $0.08 | |
| ***Distribution (83.6%)*** | 3,267,624 | 1,682,116 | 1,585,509 | 0.0124 | 1.66 | 0.0000 | 0.00 | |
| | **$3,907,033** | **$2,011,272** | **$1,895,761** | **$0.0149** | **$1.99** | **$0.0024** | **$0.08** | |

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| | | | | Off-Peak | | Wholesale Rate | | |
|---|---|---|---|---|---|---|---|---|
| | FY 2026 | Peak | Off-Peak | *cf* | *1,000 gal* | *cf* | *1,000 gal* | Notes |
| **Water Treatment** | | | | | | | | |
| Regular Employees | 561,343 | 288,970 | 272,374 | $0.0021 | $0.29 | $0.0021 | $0.29 | |
| Sick Leave Pay Out | 954 | 491 | 463 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Vacation Pay Out | 530 | 273 | 257 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Scheduled Overtime | 23,320 | 12,005 | 11,315 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Duty Pay | 18,762 | 9,658 | 9,104 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| FICA/MEDICARE Contributions | 45,621 | 23,485 | 22,136 | 0.0002 | 0.02 | 0.0000 | 0.00 | |
| Employer's Share | 59,308 | 30,531 | 28,777 | 0.0002 | 0.03 | 0.0000 | 0.00 | |
| Employer's UAL Share | 85,289 | 43,905 | 41,384 | 0.0003 | 0.04 | 0.0000 | 0.00 | |
| Employee Share Paid by Cty/Pks | 35,781 | 18,419 | 17,361 | 0.0001 | 0.02 | 0.0000 | 0.00 | |
| HRAVEBA | 17,890 | 9,210 | 8,681 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Deferred Comp | 3,919 | 2,017 | 1,901 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Other Benefits | 73 | 38 | 35 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Group Health Insurance | 199,813 | 102,860 | 96,953 | 0.0008 | 0.10 | 0.0008 | 0.10 | |
| Worker's Compensation | 7,681 | 3,954 | 3,727 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Office Supplies | 2,070 | 1,066 | 1,004 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Small Tools & Ops Supplies | 1,656 | 852 | 804 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Uniforms - Clothing | 2,795 | 1,439 | 1,356 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Technical Supplies | 51,750 | 26,640 | 25,110 | 0.0002 | 0.03 | 0.0000 | 0.00 | |
| Chemicals | 248,063 | 127,698 | 120,364 | 0.0009 | 0.13 | 0.0009 | 0.13 | |
| Books & Periodicals | 155 | 80 | 75 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Fuel | 5,775 | 2,973 | 2,802 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Building Maintenance | 1,590 | 819 | 771 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Electricity | 44,100 | 22,702 | 21,398 | 0.0002 | 0.02 | 0.0002 | 0.02 | |
| Custodial | 1,378 | 709 | 669 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Grounds Care | 7,950 | 4,093 | 3,857 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Infrastructure | 209,000 | 107,590 | 101,410 | 0.0008 | 0.11 | 0.0008 | 0.11 | |
| Communications | 5,300 | 2,728 | 2,572 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Computers | 1,045 | 538 | 507 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Postage | 621 | 320 | 301 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Radios | 105 | 54 | 51 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Professional Services | 15,900 | 8,185 | 7,715 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Licensing | 10,868 | 5,594 | 5,273 | 0.0000 | 0.01 | 0.0000 | 0.00 | |
| Internal Chg - Administrative | 214,513 | 110,428 | 104,086 | 0.0008 | 0.11 | 0.0000 | 0.00 | |
| Internal Chg - Insurance Svc | 38,596 | 19,869 | 18,728 | 0.0001 | 0.02 | 0.0000 | 0.00 | |
| Internal Chg - Tech Debt | 29,187 | 15,025 | 14,162 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Internal Chg - Facility Use | 33,689 | 17,342 | 16,346 | 0.0001 | 0.02 | 0.0000 | 0.00 | |
| Internal Chg - Fleet Maint | 8,644 | 4,450 | 4,194 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Internal Chg - Equip Replacmnt | 20,591 | 10,600 | 9,991 | 0.0001 | 0.01 | 0.0000 | 0.00 | |
| Personal Vehicle Mileage | 621 | 320 | 301 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Lodging | 2,588 | 1,332 | 1,256 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Meals | 1,035 | 533 | 502 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Training | 3,105 | 1,598 | 1,507 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Dues | 1,035 | 533 | 502 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| Medical & Laboratory | 20,700 | 10,656 | 10,044 | 0.0001 | 0.01 | 0.0001 | 0.01 | |
| Equipment | 2,090 | 1,076 | 1,014 | 0.0000 | 0.00 | 0.0000 | 0.00 | |
| ***Total Water Treatment*** | **$2,046,795** | **$1,053,654** | **$993,141** | **$0.0078** | **$1.04** | **$0.0049** | **$0.65** | |
| **Additional Staffing** | $0 | $0 | $0 | $0.0000 | $0.00 | $0.0000 | $0.00 | |

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| | | | | Off-Peak | | Wholesale Rate | | |
|---|---|---|---|---|---|---|---|---|
| | **FY 2026** | **Peak** | **Off-Peak** | ***cf*** | ***1,000 gal*** | ***cf*** | ***1,000 gal*** | **Notes** |
| **Taxes & Transfers** | $746,705 | $384,391 | $362,314 | $0.0028 | $0.38 | $0.0000 | $0.00 | *As O&M* |
| **Rate Funded Capital** | 2,000,000 | 1,029,565 | 970,435 | 0.0076 | 1.02 | 0.0000 | 0.00 | *As O&M* |
| **Net Debt Service** | 286,609 | 147,541 | 139,068 | 0.0011 | 0.15 | 0.0000 | 0.00 | *As O&M* |
| **Reserve Funding** | 14,925 | 7,683 | 7,242 | 0.0001 | 0.01 | 0.0000 | 0.00 | *As O&M* |
| | **$10,153,895** | **$5,227,047** | **$4,926,848** | **$0.0386** | **$5.16** | **$0.0073** | **$0.74** | |

| | |
|---|---|
| **Billed Volume (cf)** | **127,545,062** |
| **Billed Volume (1,000 gal)** | **954,037** |

| | **Off-Peak** | **Peak** |
|---|---|---|
| **Total Consumption** | 46.0% | 54.0% |
| **Peak Water Use** | 51.0% | 49.0% |
| | **48.5%** | **51.5%** |

DRAFT

**City of Ashland**
**Water Rate Study**
**Residential - Alt 2**

| | *Present Rates* | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | |
| All Customers | $13.33 | $16.50 | $19.25 | $22.00 | $25.10 | $29.00 |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | |
| 0.75" | $15.62 | $15.95 | $18.10 | $20.54 | $23.31 | $26.46 |
| 1" | 16.29 | 18.63 | 23.42 | 29.15 | 36.00 | 44.19 |
| 1.5" | 74.52 | 71.50 | 75.92 | 80.24 | 84.34 | 88.11 |
| 2" | 118.41 | 113.73 | 120.92 | 127.97 | 134.73 | 141.03 |
| 3" | 237.45 | 225.87 | 237.49 | 248.14 | 257.35 | 264.60 |
| 4" | 376.59 | 360.81 | 382.52 | 403.52 | 423.26 | 441.09 |
| 6" | 741.01 | 711.65 | 756.51 | 800.52 | 842.70 | 881.91 |
| 8" | 1,174.75 | 1,129.78 | 1,202.87 | 1,275.15 | 1,345.12 | 1,411.11 |
| **Quantity Charge** | *$ / cf* | | | | | |
| ***October - May*** | | | | | | |
| 0 - 300 | $0.0280 | $0.0263 | $0.0299 | $0.0339 | $0.0385 | $0.0437 |
| 301 - 1,000 | 0.0348 | 0.0425 | 0.0482 | 0.0547 | 0.0621 | 0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| Over 2,500 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| ***June - September*** | | | | | | |
| 0 - 300 | $0.0280 | $0.0263 | $0.0299 | $0.0339 | $0.0385 | $0.0437 |
| 301 - 1,000 | 0.0348 | 0.0425 | 0.0482 | 0.0547 | 0.0621 | 0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| 2,501 - 3,600 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| Over 3,600 | 0.0784 | 0.0957 | 0.1087 | 0.1234 | 0.1401 | 0.1590 |

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**City of Ashland**
**Water Rate Study**
**Residential Irrigation - Alt 2**

| | *Present Rates* | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | |
| All Customers | $13.33 | $16.50 | $19.25 | $22.00 | $25.10 | $29.00 |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | |
| 0.75" | $15.62 | $15.95 | $18.10 | $20.54 | $23.31 | $26.46 |
| 1" | 16.29 | 18.63 | 23.42 | 29.15 | 36.00 | 44.19 |
| 1.5" | 74.52 | 71.50 | 75.92 | 80.24 | 84.34 | 88.11 |
| 2" | 118.41 | 113.73 | 120.92 | 127.97 | 134.73 | 141.03 |
| 3" | 237.45 | 225.87 | 237.49 | 248.14 | 257.35 | 264.60 |
| 4" | 376.59 | 360.81 | 382.52 | 403.52 | 423.26 | 441.09 |
| 6" | 741.01 | 711.65 | 756.51 | 800.52 | 842.70 | 881.91 |
| 8" | 1,174.75 | 1,129.78 | 1,202.87 | 1,275.15 | 1,345.12 | 1,411.11 |
| **Quantity Charge** | *$ / cf* | | | | | |
| ***October - May*** | | | | | | |
| 0 - 1,000 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| Over 2,500 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| ***June - September*** | | | | | | |
| 0 - 1,000 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| 2,501 - 3,600 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| Over 3,600 | 0.0784 | 0.0957 | 0.1087 | 0.1234 | 0.1401 | 0.1590 |

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**City of Ashland**
**Water Rate Study**
**Multi-Family - Alt 2**

| | *Present Rates* | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | |
| All Customers | $13.33 | $16.50 | $19.25 | $22.00 | $25.10 | $29.00 |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | |
| 0.75" | $15.62 | $15.95 | $18.10 | $20.54 | $23.31 | $26.46 |
| 1" | 16.29 | 18.63 | 23.42 | 29.15 | 36.00 | 44.19 |
| 1.5" | 74.52 | 71.50 | 75.92 | 80.24 | 84.34 | 88.11 |
| 2" | 118.41 | 113.73 | 120.92 | 127.97 | 134.73 | 141.03 |
| 3" | 237.45 | 225.87 | 237.49 | 248.14 | 257.35 | 264.60 |
| 4" | 376.59 | 360.81 | 382.52 | 403.52 | 423.26 | 441.09 |
| 6" | 741.01 | 711.65 | 756.51 | 800.52 | 842.70 | 881.91 |
| 8" | 1,174.75 | 1,129.78 | 1,202.87 | 1,275.15 | 1,345.12 | 1,411.11 |
| **Quantity Charge** | *$ / cf* | | | | | |
| ***October - May*** | | | | | | |
| 0 - 300 | $0.0280 | $0.0263 | $0.0299 | $0.0339 | $0.0385 | $0.0437 |
| 301 - 1,000 | 0.0348 | 0.0425 | 0.0482 | 0.0547 | 0.0621 | 0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| Over 2,500 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| ***June - September*** | | | | | | |
| 0 - 300 | $0.0280 | $0.0263 | $0.0299 | $0.0339 | $0.0385 | $0.0437 |
| 301 - 1,000 | 0.0348 | 0.0425 | 0.0482 | 0.0547 | 0.0621 | 0.0705 |
| 1,001 - 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| 2,501 - 3,600 | 0.0609 | 0.0744 | 0.0844 | 0.0958 | 0.1087 | 0.1234 |
| Over 3,600 | 0.0784 | 0.0957 | 0.1087 | 0.1234 | 0.1401 | 0.1590 |

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**City of Ashland**
**Water Rate Study**
**Commercial - Alt 2**

| | *Present Rates* | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | |
| All Customers | $13.33 | $16.50 | $19.25 | $22.00 | $25.10 | $29.00 |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | |
| 0.75" | $15.62 | $15.95 | $18.10 | $20.54 | $23.31 | $26.46 |
| 1" | 16.29 | 18.63 | 23.42 | 29.15 | 36.00 | 44.19 |
| 1.5" | 74.52 | 71.50 | 75.92 | 80.24 | 84.34 | 88.11 |
| 2" | 118.41 | 113.73 | 120.92 | 127.97 | 134.73 | 141.03 |
| 3" | 237.45 | 225.87 | 237.49 | 248.14 | 257.35 | 264.60 |
| 4" | 376.59 | 360.81 | 382.52 | 403.52 | 423.26 | 441.09 |
| 6" | 741.01 | 711.65 | 756.51 | 800.52 | 842.70 | 881.91 |
| 8" | 1,174.75 | 1,129.78 | 1,202.87 | 1,275.15 | 1,345.12 | 1,411.11 |
| **Quantity Charge** | *$ / cf* | | | | | |
| ***Less than 2" Meter*** | | | | | | |
| 0 - 2,500 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| Over 2,500 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |
| ***2" Meter or Larger*** | | | | | | |
| 0 - 15,000 | $0.0348 | $0.0425 | $0.0482 | $0.0547 | $0.0621 | $0.0705 |
| Over 15,000 | 0.0472 | 0.0576 | 0.0654 | 0.0742 | 0.0842 | 0.0956 |

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**City of Ashland**
**Water Rate Study**
**Commercial Irrigation - Alt 2**

| | *Present Rates* | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | |
| All Customers | $13.33 | $16.50 | $19.25 | $22.00 | $25.10 | $29.00 |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | |
| 0.75" | $15.62 | $15.95 | $18.10 | $20.54 | $23.31 | $26.46 |
| 1" | 16.29 | 18.63 | 23.42 | 29.15 | 36.00 | 44.19 |
| 1.5" | 74.52 | 71.50 | 75.92 | 80.24 | 84.34 | 88.11 |
| 2" | 118.41 | 113.73 | 120.92 | 127.97 | 134.73 | 141.03 |
| 3" | 237.45 | 225.87 | 237.49 | 248.14 | 257.35 | 264.60 |
| 4" | 376.59 | 360.81 | 382.52 | 403.52 | 423.26 | 441.09 |
| 6" | 741.01 | 711.65 | 756.51 | 800.52 | 842.70 | 881.91 |
| 8" | 1,174.75 | 1,129.78 | 1,202.87 | 1,275.15 | 1,345.12 | 1,411.11 |
| **Quantity Charge** | *$ / cf* | | | | | |
| ***October - May*** | | | | | | |
| Non-Peak Consumption | $0.0376 | $0.0367 | $0.0417 | $0.0473 | $0.0537 | $0.0609 |
| ***June - September*** | | | | | | |
| Peak Consumption | $0.0510 | $0.0615 | $0.0698 | $0.0792 | $0.0899 | $0.1020 |

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**City of Ashland**
**Water Rate Study**
**Institutional - Alt 2**

| | *Present Rates* | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | |
| All Customers | $13.33 | $16.50 | $19.25 | $22.00 | $25.10 | $29.00 |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | |
| 0.75" | $15.62 | $15.95 | $18.10 | $20.54 | $23.31 | $26.46 |
| 1" | 16.29 | 18.63 | 23.42 | 29.15 | 36.00 | 44.19 |
| 1.5" | 74.52 | 71.50 | 75.92 | 80.24 | 84.34 | 88.11 |
| 2" | 118.41 | 113.73 | 120.92 | 127.97 | 134.73 | 141.03 |
| 3" | 237.45 | 225.87 | 237.49 | 248.14 | 257.35 | 264.60 |
| 4" | 376.59 | 360.81 | 382.52 | 403.52 | 423.26 | 441.09 |
| 6" | 741.01 | 711.65 | 756.51 | 800.52 | 842.70 | 881.91 |
| 8" | 1,174.75 | 1,129.78 | 1,202.87 | 1,275.15 | 1,345.12 | 1,411.11 |
| **Quantity Charge** | *$ / cf* | | | | | |
| All Consumption | $0.0334 | $0.0416 | $0.0472 | $0.0536 | $0.0608 | $0.0690 |

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**City of Ashland**
**Water Rate Study**
**Institutional Irrigation - Alt 2**

| | *Present Rates* | FY 2026 | FY 2027 | FY 2028 | FY 2029 | FY 2030 |
|---|---|---|---|---|---|---|
| **Customer Charge** | *$ / Acct. / Mo.* | | | | | |
| All Customers | $13.33 | $16.50 | $19.25 | $22.00 | $25.10 | $29.00 |
| **Meter Charge** | *$ / Acct. / Mo.* | | | | | |
| 0.75" | $15.62 | $15.95 | $18.10 | $20.54 | $23.31 | $26.46 |
| 1" | 16.29 | 18.63 | 23.42 | 29.15 | 36.00 | 44.19 |
| 1.5" | 74.52 | 71.50 | 75.92 | 80.24 | 84.34 | 88.11 |
| 2" | 118.41 | 113.73 | 120.92 | 127.97 | 134.73 | 141.03 |
| 3" | 237.45 | 225.87 | 237.49 | 248.14 | 257.35 | 264.60 |
| 4" | 376.59 | 360.81 | 382.52 | 403.52 | 423.26 | 441.09 |
| 6" | 741.01 | 711.65 | 756.51 | 800.52 | 842.70 | 881.91 |
| 8" | 1,174.75 | 1,129.78 | 1,202.87 | 1,275.15 | 1,345.12 | 1,411.11 |
| **Quantity Charge** | *$ / cf* | | | | | |
| ***October - May*** | | | | | | |
| Non-Peak Consumption | $0.0376 | $0.0367 | $0.0417 | $0.0473 | $0.0537 | $0.0609 |
| ***June - September*** | | | | | | |
| Peak Consumption | $0.0510 | $0.0615 | $0.0698 | $0.0792 | $0.0899 | $0.1020 |

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