



Housing & Human Services Advisory Committee Meeting Agenda

ASHLAND HOUSING & HUMAN SERVICES ADVISORY COMMITTEE

REGULAR MEETING AGENDA

Thursday, March 26, 2026

Siskiyou Room, 51 Winburn Way

4 pm

Note: Anyone wishing to speak at any Housing and Human Services Advisory Committee meeting is encouraged to do so. If you wish to speak, please rise and, after you have been recognized by the Chair, give your name and complete address for the record. You will then be allowed to speak. Please note the public testimony may be limited by the Chair. Zoom

link: <https://zoom.us/j/93276040871?pwd=Kav2XBGT9ibLaFGDEaeWT64RPDhCK.1>

I. CALL TO ORDER

II. APPROVAL OF THE AGENDA

III. CONSENT AGENDA

- A. Approval of February 26, 2026, Minutes

IV. PUBLIC FORUM

- A. Public Forum.

V. NEW BUSINESS

- A. Community Development Block Grant Presentation and Recommendation.
- B. Affordable Housing Trust Fund Application Review and Recommendation.

VI. UNFINISHED BUSINESS

- A. Brief Discussion item: 2026 Community Resource Fair Event.

VII. INFORMATIONAL ITEMS

- A. Liaison Reports.
- B. General Announcements.

VIII. AGENDA BUILDING - FUTURE MEETINGS

IX. ADJOURNMENT: 6:00 PM

If you need special assistance to participate in this meeting, please contact Linda Reid at linda.reid@ashlandoregon.gov or 541.488.5305 (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.



Housing And Human Services Committee Minutes

February 26, 2026 REGULAR MEETING Minutes

Committee Members Present:	Council Liaison:
Noah Werthaiser	Bob Kaplan (absent)
Montana Hauser	Derek Sherrell (absent)
Jim Dykstra	
Ashley Laube	Staff Present:
John Maher	Brandon Goldman, Community Development Director
	Micheal Sullivan, Administrative Assistant
Committee Members Absent	SOU Liaison:
	Vacant

I. **CALL TO ORDER:** 4:01 p.m.

II. **CONSENT AGENDA**

A. Approval of December 18, 2025, Minutes

**Maher/Dykstra M/S to approve the Consent Agenda as presented. Voice Vote:
Hauser, Dykstra, Maher, Laube, Werthaiser: AYE. Motion passed 5-0.**

III. **PUBLIC FORUM** – None

IV. **NEW BUSINESS**

A. Social Services Grant Presentation

The Committee heard brief presentations from several applicants for Social Services funding including:

Ashland Community Food Bank

Center For Non-Profit Legal Services

Community Works

Food and Friends

OHRA

Rogue Valley Mentoring

Southern Oregon Jobs with Justice

St. Vincent De Paul

United Way

B. Social Services Grant Application Review and Recommendations



Housing And Human Services Committee Minutes

Applicant	Recommended Funding Amount
Ashland Emergency Food Bank	\$7,500
Center for Non-Profit Legal Services	\$5,100
Community Works (Dunn House)	\$10,180
Jackson County SART	\$7,220
Opportunities for Housing, Resources, and Assistance	\$25,100
Rogue Valley Council of Governments (Food and Friends)	\$8,740
RV Mentoring	\$4,500
Southern Oregon Jobs with Justice	\$8,060
St. Vincent De Paul	\$15,900
United Way	\$6,700
Total	\$99,000

Maher/Dykstra m/s to approve funds allocation recommendation to City Council. Voice Vote: Hauser, Dykstra, Maher, Laube, Werthaiser: AYE. Motion passed 5-0.

C. Recreational Vehicles in Single Family Neighborhoods Discussion

Werthaiser/Maher m/s to not adopt the addition proposed by Councilor Sherrell and instead evaluate it at the Committee's Strategy Planning Session in November 2026 for the upcoming year. Voice Vote: Hauser, Dykstra, Maher, Laube, Werthaiser: AYE. Motion passed 5-0.

V. UNFINISHED BUSINESS – None

VI. INFORMATIONAL ITEMS

- A.** Liaison Reports
- B.** General Announcements

VII. AGENDA BUILDING – Future Meetings

Community Development Block Grant Application Review and Recommendations
Affordable Housing Trust Fund Application Review And Recommendations

VIII. ADJOURNMENT: 5:53 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).

Memo

DATE: March 26, 2026

TO: Housing and Human Services Advisory Committee

FROM: Linda Reid, Housing Program Manager

DEPT: Planning

RE: CDBG Applicant Presentations and Grant Application Review and Discussion.

The City of Ashland Received an application for the CDBG funding available from Maslow Project.

Attachments:

- Maslow Project Public Services Application

Planning Department

20 East Main Street
Ashland, Oregon 97520
ashland.or.us

Tel: 541.488.5300
Fax: 541.552.2059
TTY: 800.735.2900





CITY OF ASHLAND
2026 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#: **[REDACTED]**

Mission Statement: (may be attached)

Maslow Project's mission is to end youth homelessness sooner, through a holistic approach that builds resilience and preserves 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, 2027

Requested CDBG Funds: \$ 18,000

Organizational Match: \$ 13,100 *included in the "Funds from other sources"

Funds from Other Sources: \$ 111,100

Total Project Cost: \$ 129,100

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 (HAJC) 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.

Also faced with a \$50k annual reduction in State Youth Development Division (YDD) funding for the 2025-2027 biennium, Maslow Project is actively seeking alternative funding sources to bridge this critical gap and ensure uninterrupted services for vulnerable youth.

While HAJC provides 15 Ashland 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 and 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

61.3% (Oregon Dept of Education 2024-25 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 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 last year's drive 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 and responsibilities, rapport-building and 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 and case managers are both Community Health Workers (CHWs) and Qualified Mental Health Associates (QMHA's), 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 the 2024-25 program year, Maslow Project served 3,601 youths and their families. We permanently housed 157 households, provided ongoing case management for 59 households, and provided housing supports (e.g. deposit/utility/application fees) to 446 households.

Currently, we case-manage 15 HAJC dedicated units at Snowberry Brook in Ashland, 29 units in Medford and 24 units at other sites throughout the Rogue Valley.

Our HAJC partnership helps our clients jump past a four-year Section 8 HUD wait list. Through case management, we empower residents to maintain stable housing, care for their units responsibly, and cultivate the skills necessary for long-term self-sufficiency.

We provide a holistic approach to ending youth and family homelessness as a direct service provider and 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 avoiding 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 youth 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 individuals served: 50 individuals (youth and/or parents) will receive skilled case management and 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 \$129,100.

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, 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: 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 (QMHA's). 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." Last program year, 91% of Maslow Case-Managed youth graduated on-time (compared with a 61.3.% for this population in Oregon state).

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. 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 and 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/fees 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 provides weekly life skills training—developing essential skills in areas such as budgeting, conflict resolution, and job readiness—while also supporting their pursuit of educational and employment goals and their transition to self-sustained 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.

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, 2026 to June 30, 2027. *Please see attached project schedule (Form A-1) for more details.*

5) Financial Information

Project Expenses:

Wages & Fringe Benefits: Payroll is based on compensation for a 1.0 FTE Case Manager at \$70,761 annual cost for wages + benefits (\$27hr*40 hr/wk*52wks=\$56,160 wages + 26% payroll taxes & employee benefits = \$14,601).

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 approximately 25% of the 1.0 FTE dedicated to this project.**

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

Marketing: Materials and supplies to promote our programs and services, 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 \$16,839 - *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 de minimus 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 \$129,100.

The \$18,000 requested from the Ashland Community Development Block Grant represents ~14% 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 A-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 end youth homelessness sooner, through a holistic approach that builds resilience and preserves 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, school-based programs, street and rural outreach, 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-sensitive, inclusive, and focused on equity. Maslow's program model is intentionally youth-centered. Other best practices we utilize include harm reduction, positive youth development, and strength-based approaches to foster resiliency.

Maslow has established strong partnerships with local school districts—including Medford, Phoenix-Talent, Ashland, Grants Pass, and Three Rivers—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.

Starting in 2019, Maslow expanded its services to also include Permanent Supportive Housing and then in 2024, a Transitional Living Program, thereby creating pathways to move from homelessness to stable housing, completing a full circle of support and transformation.

Throughout its history, Maslow Project has focus on ending youth homelessness and providing comprehensive, wrap-around supports that enable youth and families to thrive. Maslow Project is a regional leader in trauma-sensitive 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:** Maslow Project utilizes a strengths-based approach, in which youth identify their strengths and capabilities through self-assessments, thereby building self-confidence and resilience for navigating life's challenges. All Maslow staff recently received strengths-based training from Dr. Kenneth Ginsburg, a renowned pediatrician specializing in adolescent medicine at The Children's Hospital of Philadelphia (provided in collaboration with

Southern Oregon University).

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 Community Health Workers (CHW) and Qualified Mental Health Associate (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 persons of low and moderate incomes.

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 2026-2027 program year – approximately 50 of whom will participate in intensive Case Management (1.0 FTE) with 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 identify strengths, develop goal plans, teaching problem-solving skills and foster 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-sensitive care, positive youth development, strengths-based approaches, 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 24-25, 75% of clients increased self-sufficiency. 91% of school-based clients graduated high school. 95% of clients retained housing in our Permanent Supportive Housing program, and 100% of clients had increased access to resources and safety-net services.

11) Attachments

Please see attached Letter of Support from Housing Authority of Jackson County, Maslow Project's Board of Directors List, and our 2024-2025 Annual Report with statistics for the year.

12) CDBG Application Checklist

Attached.

CITY OF ASHLAND
2026 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 (due to unhoused status are presumed benefit)
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-1
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. • 100 individuals will be contacted and have increased access to basic needs, linkages to community-based services, and a safety plan. • 50 individuals (youth and/or parents) will receive skilled case management & individualized supports • 15 households will receive housing case management services	7/1/26	6/30/27
Collect Outcome Data: Individuals & families are assessed at start of case management with an intake appointment and with regular check-ins and assessments, including the 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. • 80% of the high school-aged youths in case management will develop two or more positive connections. • 70% of the 50 clients in case management will make measurable growth on their overall self-sufficiency scores. • 90% of the 15 households will remain permanently housed in PSH housing for at least 12 months.	7/1/26	6/30/27

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 A-2
To be completed for Social Service Proposals

Social Service Proposals

	Total Cost	CDBG Request	Other Source(s)
Direct Client Services			
Wages (persons providing direct client services) 1 FTE Case Manager (wages + fringe)	70,761	18,000	52,761
Materials/Supplies (barrier removal, basic needs, rent assistance, deposits)	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. (indirect- @15% of direct charges)	16,839	CDBG Funds are not available for program administration	16,839
Total Project Cost	129,100	18,000	111,100

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	\$0	10/1/25 – 9/29/29
State Grants	\$11,000 YDD	\$0	\$17,000 YEHP	7/1/25
Local Grants	\$40,000 ACCESS	\$0	\$18,000 Ash. CDBG \$10,000 Ash SD	ACCESS 7/1/25 ASD 7/1/26
Non- Governmental Grants	\$0	\$0	\$5,000 Butler	Butler 7/1/26
Donations/Gifts	\$0	\$0	\$13,100	FY 2026-27
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	\$66,000	\$0	\$63,100	\$129,100

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 26-27 but is anticipated. Butler funds are awarded on a rolling annual basis and are also anticipated. YDD is a 2-year state grant for educational reengagement, already awarded. ACCESS funds for housing supports have been secured. YEHP is a 2-year biennium fund from the State (application planned spring 2026). TLP is a federal grant that was awarded 10/1/25 and has a non-compete (renewal) application process each year, through 9/30/29.

It's worth noting the status of federal sources has been cause for concern amongst nonprofits, including our loss of federal Street Outreach Program funds (\$150k/yr) as of 9/29/25, so our agency is always trying to increase our non-federal revenues where possible, which includes a robust fundraising program for individual giving.

Revenue	Status	Amount
Federal Grants		15,000
TLP – 15,000	Planned (non-compete)	
State Grants		28,000
YDD – 11,000	Secured	
YEHP – 17,000	Planned 7/1/26	
Local Grants		68,000
Ashland CDBG 18,000	<i>This request</i>	
ACCESS 40,000	Secured	
Ashland SD 10,000	Planned 7/1/26	
Non-Governmental Grants	Secured (Butler on-going funding)	5,000
Butler 5,000		
Donations/Gifts – Match 10%	Planned (FY 26-27 on-going)	13,100
Total Revenue		129,100
Expenses		
Wages (1FTE@\$27/hrx40hrsx52wks)		56,160
Staff Benefits (@26% of wages)		14,601
Materials/Supplies (barrier removal, basic needs, rent assistance, deposits)		40,000
Marketing (outreach materials)		1,500
Admin (indirect-@15% of direct charges)		16,839
Total Expenses		129,100

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/ Board Development Committee
2. Sara DeVries, Vice Chair – Ambassador/ Committee
3. Amy Zarosinski, Treasurer – Executive/Finance Committees
4. Sharilyn Cano, Secretary – Executive/ Board Development Committees
5. Jamie Hazlett, Esq, Member – Finance/ Ambassador Committee
6. Ray Hetzer, Member - Board Development Committee
7. Tyler Holbrook, Member – Ambassador/ Finance 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



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

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

**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
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Joined in 2011

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

**Tyler Holbrook, Member
VP of Member Service, Rogue Credit
Union**
1370 Center Dr.
Medford, OR 97501
(541) 622-7205
tholbrook@roguecu.org
Joined in 2025

Revised: January 2026

**500 Monroe Street, Medford, Oregon 97501
541-608-6868**



January 21, 2026

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 long-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 Real Estate Operations
Ext. 1002
cara@hajc.net

MASLOW team



Mary Ferrell
Executive Director



Cris Ayson
Finance Director



Cheyenne Nichols
Program Director
Education



Matt Northrop
Program Director
Housing & Outreach



Paula Weldon
Director of
Operations



Nicole Ritterbush
Staff Supervisor
Housing & Outreach



Erin Zelinka
Development
Officer



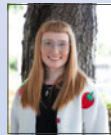
Lauren Bosserman
School-Based
Case Manager



Denise Brown
Housing
Case Manager



Blanca Duran
Case Manager



Mariah Henderson
Josephine County
Case Manager



Ben Herman
DCT Case Manager



Nicole Hoefflinger
School-Based Lead
& Case Manager



Maribel Garcia
Housing Case
Manager



Adriano Martinez
Intake & Outreach



Ayden Moore
Bookkeeper



Meredith Morgan
Community
Engagement Specialist



Mauro Reyes
Lopez
Case Manager



Aris Rivera
Data Specialist



Casey Stine
Case Manager &
Outreach



Brandy Stromme
Team Lead &
Case Manager



Lisa Morris
Chair



Sara DeVries
Vice Chair



Amy Zarosinski
Treasurer



Sharilyn Cano
Secretary



Jamie Hazlett
Member

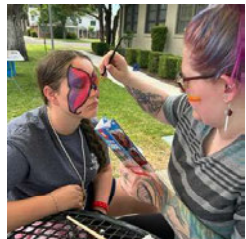
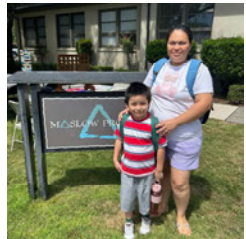


Ray Hetzer
Member



Tyler Holbrook
Member

2024-2025 Annual Report



Our Mission

We end youth homelessness sooner through a holistic approach that builds resilience and preserves hope.

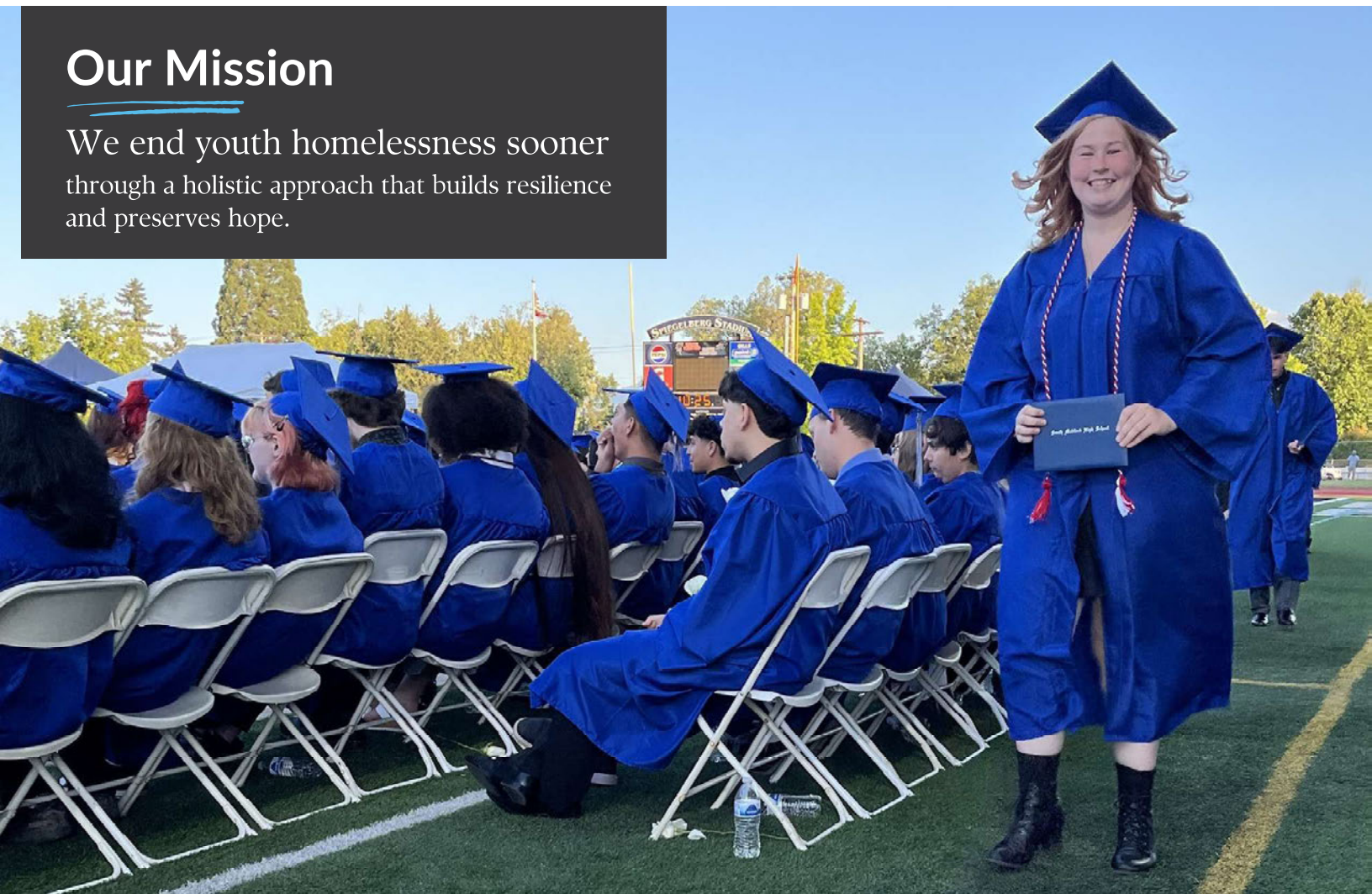


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We couldn't have done it without your generous support.



Thank you

to all our donors,
sponsors, partners
and volunteers!

@ giving@maslowproject.com

www.maslowproject.org

Mailing: PO Box 999, Medford, OR 97501

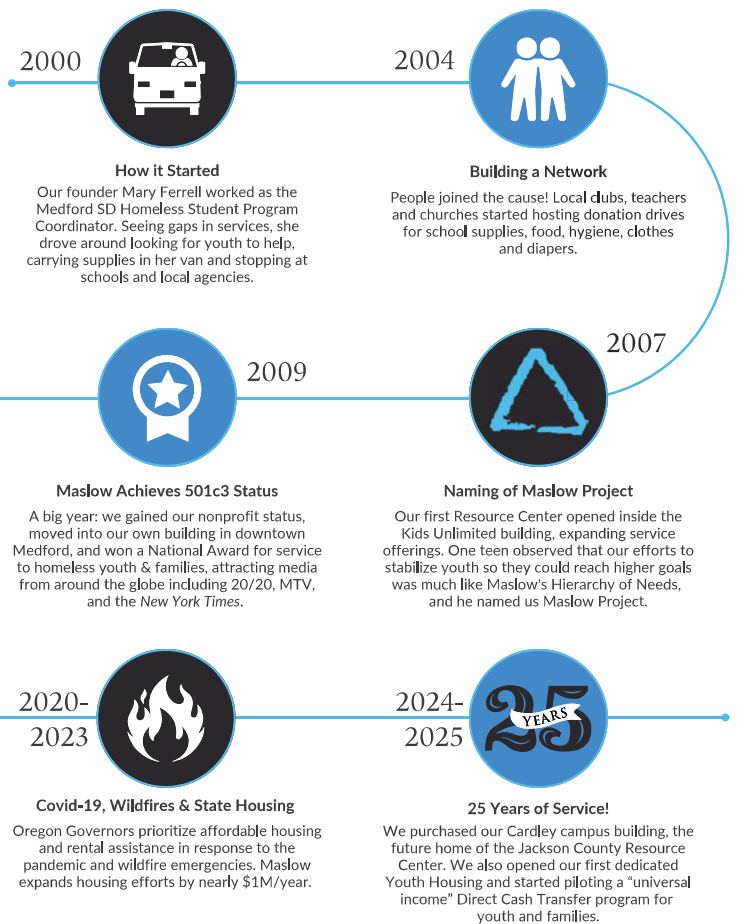
Physical: 500 Monroe St, Medford, OR 97501

541-608-6868

Tax ID: 27-0734969

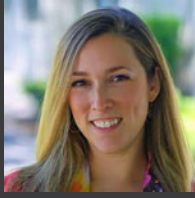


Celebrating 25 Years of Changing Lives



25 Years of Hope

A Conversation with Mary Ferrell, Founder of Maslow Project



Q How did this journey begin for you?

A I began as the Homeless Students Liaison for the Medford School District. I quickly realized these children couldn't focus on school when survival needs weren't met. How could they concentrate on math when they'd slept in a car, or outside in the rain, and didn't know where their next meal was coming from? The resources were scarce and insufficient, and nobody else was taking the problem on—so I did. The vision was clear from the beginning. I quickly found supporters and helpers and started building a better system—one that truly worked for youth.

Q How did Maslow Project officially get its name?

A That was one of those “that's IT” moments. A teen was getting help in our early drop-in center and had been learning about Maslow's Hierarchy of Needs in school. He wisely observed our various resources—food, clothing, shelter—and said, “This is like the “Maslow Project.” The name stuck from that day forward!

Q How has Maslow Project grown over the past 25 years?

A From a small school-based program in Medford, we've expanded to serve over 3,000 people each year in public schools across our two-county valley. That success helped us launch two resource centers, a critical outreach program reaching rural communities, a growing housing program, and now we are offering community health services as a protective measure across all programs. We have built our own safety-net for these kids and woven our strong partnerships throughout.

Q What are some of the biggest challenges you've faced over the years?

A Sustainable funding is a constant challenge—we must raise every penny of our budget then do it again each year. We've also faced the challenge of helping people understand youth homelessness is rarely a choice. Breaking stereotypes while protecting our youth's dignity requires constant education and advocacy. And we have had to adapt, overcome, and persevere through economic downturns, pandemics, fires, and a world where kids engage differently than 25 years ago.

Q Can you share a success story that exemplifies Maslow's impact?

A While respecting confidentiality, I'm proudest of our 91% high school graduation rate for case-managed seniors, compared to just 60% statewide for homeless students. Each graduate represents a young person who overcame tremendous obstacles to create a more stable future.

Q How has the landscape of youth homelessness changed since you began this work?

A We've seen increasing complexity in needs, with more youth experiencing trauma, mental health challenges, and family instability. Cost of living and housing affordability has worsened dramatically and impacts our clients and our workforce. Yet we've also seen growing awareness and community support for addressing these issues holistically, which is encouraging.

Q What partnerships have been most crucial to Maslow's success?

A Our school district partnerships have been critical and foundational, allowing us to reach youth where they spend most of their time. We've built relationships with over 40 community organizations to create a comprehensive safety net. Being able to add housing, outreach and community health through our amazing partnerships helps us stabilize youth beyond the school day and ensure no youth falls through the cracks.

Q How do you measure success at Maslow Project?

A Beyond statistics, success means youth feeling safe, developing positive connections with healthy adults, completing school, and building the resilience and life skills to become healthy functioning adults. These successes are echoed back to us every single day—people in stores, online, or out in community—telling us their story of when Maslow helped them and the lifelong impact that made. It's both rewarding and motivating to keep doing the hard work.

Q Looking back, what are you most proud of accomplishing?

A Creating something that works—a program that's holistic, effective, and genuinely changes lives. I'm proud we've maintained our integrity, our impact, and our youth-centered focus while growing. Most importantly, I'm proud of the thousands of young people who've found hope and opportunity through Maslow and at what THEY accomplished with a little support.

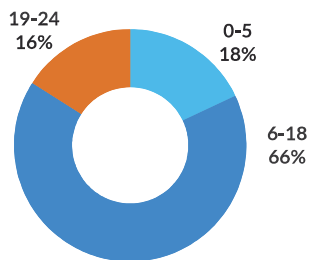
Q What's your vision for Maslow Project's next 25 years?

A In a perfect world, Maslow wouldn't need to be here in 25 years. But if the need continues, I would love to reach a point where we shift from ending youth homelessness to PREVENTING youth homelessness. I hope that our passion, focus, partnerships, and community will continue to work together toward those goals!

Impact by the Numbers

Compassion in Action

Ages of Youth Served



Average Age of Youth Served

11½



3,601

Individuals Served
(youths + family members)

thanks to you!



2,709 in
Jackson
County



883 in
Josephine
County

(9 served in other counties)



Ethnicity

57%

White

24%

Multi-Racial

14%

Hispanic/Latino/a

2%

Native American

2%

Black/African
American

0.5%

Pacific Islander

0.2%

Asian

1%

Undisclosed

(Totals rounded up to nearest percentage if greater than .5%)



766

received
clothing



1,393

received
hygiene &
infant items



474

received
transportation
assistance



2,459

received
food assistance

Education

Breaking Barriers to Big Dreams

From Darkness to Hope

When London was first introduced to Maslow, their mother had passed away, and they had just moved to Ashland from California.

Their grandmother in California had become unable to care for them any longer, so London had moved into a trailer with their sister in rural Ashland. Still mourning their mother's death and completely uprooted, London felt lost in the world.

Maslow Project helped London enroll at Ashland High School and began providing support through our School-Based Case Management.

At first, London was failing classes and not doing well emotionally. Maslow Case Manager Laura met with them regularly and provided basic needs, covered fees, and also supported their mental health and social-emotional wellbeing.

London ended up earning straight As and graduated in June 2025. London hadn't planned on going to college, but with Maslow's guidance, decided to attend Rogue Community College in the fall.

Maslow awarded London a \$1k scholarship, funded by the Robert J and Leona DeArmond Foundation. *"I am going to college in the fall to study art. Art is my passion and my dream, so this scholarship is helping me achieve what I want to achieve!"*



"I have no idea what I would have done without Maslow Project. They have given me the push I need to get through that dark space."



Impact Report

RAISING GRAD RATES BY 30%

91% of Maslow Case-Managed students graduated on-time in 2025, whereas the Oregon state graduation rate for homeless youth is only 60.6%.*

ADVOCATING FOR 382 YOUTH ON THEIR OWN

382 unaccompanied youth—who face unique challenges due to their lack of parental or guardian support—were supported by Maslow last year.



School-based case managers help these youth overcome barriers to essential documentation, transportation, school enrollment, attendance, employment, and housing. Using a Positive Youth Development model, they support youth in building life skills, engaging in recreation, and increasing resilience for positive life outcomes.

181

High School Students Supported by Case Management

91%

of Case-Managed Students Graduated On Time

94%

Made Academic Progress

86%

Connected to 2+ Positive Supports

*Oregon Department of Education SY23-24 data

Outreach

Meeting Youth Where They Are



“We had some scary moments where it seemed like she was going to deliver on the river.”

The Maslow Project Outreach Team helps the most vulnerable youth and families who are living either on the streets or in rural areas without access to services and transportation. Last year, Case Manager Nicole worked with a teen boy who, after his parent had passed away, was living in a tent by the river with his pregnant girlfriend.

With no power, water or transportation, the couple was in danger of having the baby on the river. Nicole supported them with everything from basic needs and healthcare resources to finding stable housing near a hospital, where their baby boy was born healthy, thanks to targeted intervention by Maslow Outreach.

Housing

A Stable Foundation



How We House

PERMANENT SUPPORTIVE HOUSING (PSH)

Since 2019, Maslow has partnered with the Housing Authority of Jackson County (HAJC), who allocates units to us for fast-tracking homeless youth and families into stable, permanent housing without the long waitlist and ensuring long-term tenancy.

OPEN-MARKET HOUSING

Case managers have relationships with landlords and property management companies across the Rogue Valley, enabling alternative options for families when HAJC housing isn't available. We help with Ready to Rent classes, applications, deposits and eviction prevention while building life skills and stability. This is a win-win model for landlords and our households!

TRANSITIONAL LIVING PROGRAM (TLP)

TLP is a Federal program supporting homeless youths ages 18-22 with subsidized housing for 18 months. Our case management supports goal plans, new opportunities and life skills to help these youth transition successfully into adulthood with stable housing, income and confidence to navigate their futures.

157

Households
Permanently
Housed by Maslow
(480 individuals)

446

Households
Received Housing
Supports
(1,331 individuals)

59

Households
Supported with
Housing Case
Management
(204 individuals)

Summer Fun Fridays

Positive Youth Development



9
Summer
Youth Events

259
Attendees

548
Backpacks with
School Supplies
Gifted

Thank you sponsors!

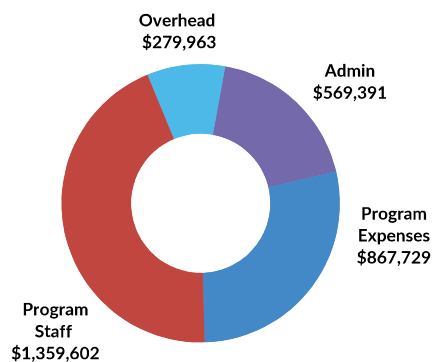


Timber Products

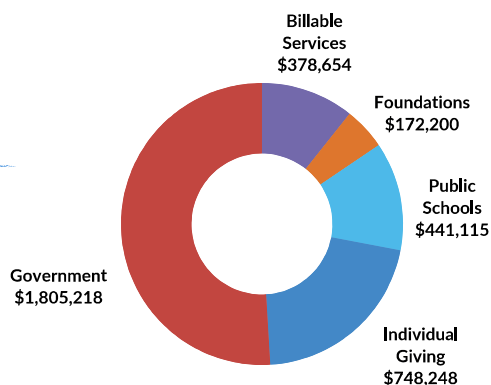


Financials

Transparency + Accountability

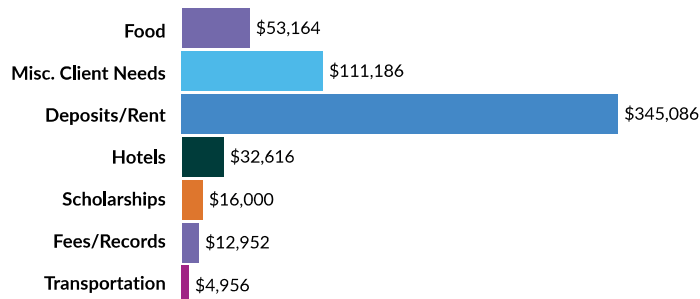


Revenue



DIRECT CLIENT ASSISTANCE

\$648,672



*Note: Deposit and rent assistance this year were higher than usual due to state grants from the Oregon Rehousing Initiative (ORI) and Youth Emergency Housing Assistance (YEHA).

Once again, Maslow Project earned the Candid Platinum Transparency Seal! This is the highest level of recognition for transparency and honesty as a nonprofit. Seals are earned by organizations for publicly sharing in-depth data, including financial details. See Maslow's profile at app.candid.org/profile/8881808.

**Platinum
Transparency
2025**

Candid.

Our Future

A New Home, Bigger Impact



Architect Rendering

Through a prior generous property donation that sold, Maslow was able to purchase our own building in January 2025. This investment is owned free and clear, allowing our resources to directly help youth and families! Over the next 2 years, work will begin in stages as resources allow—prioritizing services. Our new building, on Cardley Avenue in Medford, will include the following spaces to better serve homeless youth and families:

- Expanded food pantry, including roll-up doors for deliveries and improved capacity for greater need
- Maslow Cafe, to provide youth with work experience opportunities
- Larger common area that is safe & welcoming
- Commercial kitchen for food preparation
- Communal dining space
- More private office space for case managers and admin (*much needed!*)
- Clothing closet

Architect Rendering



Capital Needs

To create an effective, safe and welcoming space for homeless youth and families, our new building will require some essential renovations due to deferred maintenance. We are hopeful for the support of generous donors and/or foundations that have the capacity to support these capital projects that will provide a stable home base for vulnerable youth and families, long into the future.

NEW HVAC SYSTEM

A new HVAC system is needed to provide adequate heating and cooling for our new location. Installation has started but costs have yet to be fully covered.

NEW ROOF

A new roof is also essential. Installation is nearly finished, but we are still seeking financial support for the project.

REFRIGERATION SYSTEMS

Refrigeration systems for storing perishable food items are also critical for getting our food pantry ready to receive youth and families.

For a building tour or to learn more, contact giving@maslowproject.com.



DATE: March 26, 2026
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 **\$138,608** in Community Development Block Grants (CDBG) for the 2026 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 in providing 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 2026 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 **\$138,608**.

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 21, 2026. The City of Ashland has received one application for available public service funding.

Staff's eligibility assessment of each of the proposals received, and recommendations regarding the allocation of the 2026 CDBG funds are provided on the following pages.

Planning Department

20 East Main Street
Ashland, Oregon 97520
ashland.or.us

Tel: 541.488.5300
Fax: 541.552.2059
TTY: 800.735.2900



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 Public service activities for Low/Moderate Income Housing Benefit: 50 Households Assisted

Funding Requested/Available

A total of **\$24,395** in CDBG funding is available to support public service activities that meet 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 2026 Action 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

Planning Department

20 East Main Street
Ashland, Oregon 97520
ashland.or.us

Tel: 541.488.5300
Fax: 541.552.2059
TTY: 800.735.2900



Staff have 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 have 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 2025–2029 Consolidated Plan. Maslow Project requested \$18,000 in Public Service Grant funds to continue to support a case manager in the elementary,

Planning Department

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Ashland, Oregon 97520
ashland.or.us

Tel: 541.488.5300
Fax: 541.552.2059
TTY: 800.735.2900



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.

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: Maslow submitted a Community Development Block Grant public service application to support programs serving vulnerable and low-income youth in the Rogue Valley. The proposal is evaluated under the City's adopted CDBG public service criteria, including consistency with documented needs identified in the 2025 to 2029 Consolidated Plan, benefit to low- and moderate-income households, demonstrated program effectiveness,

Planning Department

20 East Main Street
Ashland, Oregon 97520
ashland.or.us

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TTY: 800.735.2900



organizational capacity, partnerships, and readiness for implementation. Maslow is an established regional service provider with experience delivering housing stability, education, and supportive services to at risk youth populations, and the proposal appears consistent with the City's priority to support programs that improve living conditions for low- and moderate-income persons.

Staff Recommendation: Award CDBG funds in the amount requested.

Planning Department

20 East Main Street
Ashland, Oregon 97520
ashland.or.us

Tel: 541.488.5300
Fax: 541.552.2059
TTY: 800.735.2900



Memo

DATE: March 26, 2026

TO: Housing and Human Services Advisory Committee

FROM: Linda Reid, Housing Program Manager

DEPT: Planning

RE: AHTF Applicant Presentations and Grant Application Review and Discussion.

The City of Ashland Received four applications for the AHTF funding available.

Attachments:

- Bentella, LLC Application
- Sunstone Housing Collaborative-AAHP Application
- Sunstone Housing Collaborative Capacity Building Application
- Trusted Homes Application
- Staff Evaluation Memo

Planning Department

20 East Main Street
Ashland, Oregon 97520
ashland.or.us

Tel: 541.488.5300
Fax: 541.552.2059
TTY: 800.735.2900



February 2026

PROPOSAL TO BUILD AFFORDABLE HOMES AT THE CALDERA OAKS SUBDIVISION



Presented to
The City of Ashland

Presented by
Bentella LLC

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Energy Efficiency & Sustainability - Pg.11

Community, Efficient Use of Resources, and Resident Stability - Pg. 12

Appendix - Pg.14

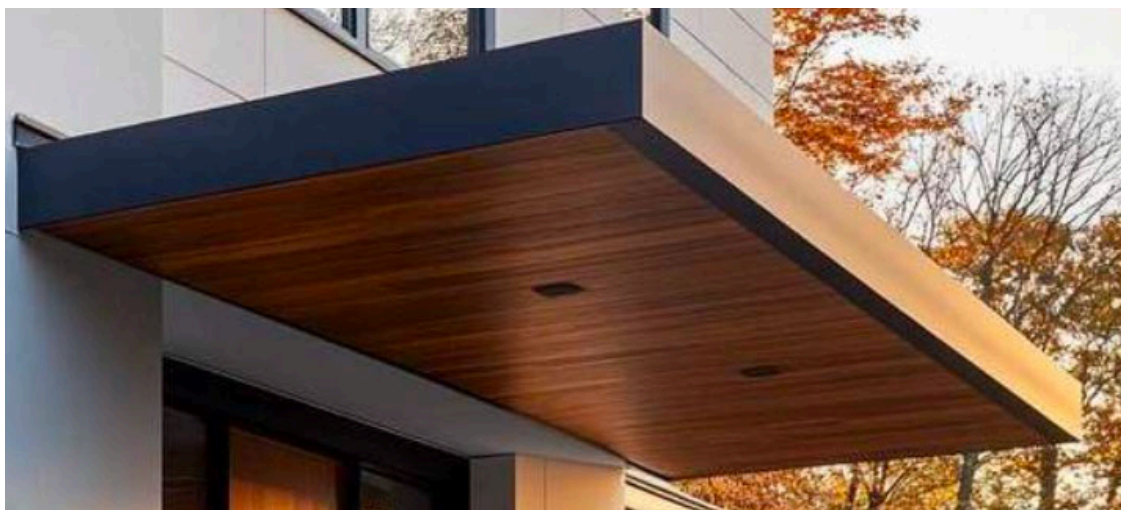
INTRODUCTION

Bentella LLC is requesting **\$200,000 from the City of Ashland Affordable Housing Trust Fund** to support the construction of eight deed-restricted affordable rental homes within the approved Caldera Oaks subdivision at **300 Clay Street**.

The affordable housing component consists of **two four-plex residential buildings located on Lots 22 and 25**, providing **eight two-bedroom rental units** that will be restricted at **80% of Area Median Income (AMI) for a minimum of 30 years**. These homes will be integrated into a mixed-income neighborhood and will be among the **first residential buildings constructed within the subdivision**.

Caldera Oaks is a fully entitled and actively advancing project. The subdivision has received City Council approval, public and private infrastructure construction is underway, and building permit applications for the four-plex buildings have already been submitted. Because the project has cleared all major entitlement hurdles and construction is in progress, the proposed affordable units can be delivered in the near term.

This request will help offset eligible construction costs and allow the project to leverage substantial private investment and existing City approvals to maximize the impact of limited public funds. The project directly advances Ashland's housing goals by delivering high-quality, long-term affordable rental housing within a shovel-ready development.



ABOUT



Bentella LLC is a residential real estate development company with active projects in California and the Rogue Valley, including Ashland. The business has demonstrated experience guiding complex residential developments through local review processes and successfully advancing projects from approval into active construction.

Bentella's work includes subdivisions and multifamily residential developments that require coordination with local jurisdictions, design professionals, engineers, and contractors, as well as careful sequencing of infrastructure and vertical construction. This experience is directly reflected in the 300 Clay Street subdivision, which has received full City approval and is currently under development, with public infrastructure construction underway and building permit applications already submitted for the four-plex buildings.

In addition to the Clay Street subdivision, Bentella LLC is currently developing **132 affordable housing units in Desert Hot Springs, California (AMP Affordable Housing), serving households at 80% AMI**. Previous projects include:

- **Stone Gate Estates, Medford** – 32 condominium units
- **Countryside Terrace, Central Point** – 20-unit residential community
- **Madrone Villa Townhomes, Rogue River** – 11 high-density townhome units

Bentella LLC maintains an active and diverse development pipeline across multiple jurisdictions, demonstrating financial capacity, organizational stability, and the ability to manage large-scale residential projects concurrently.

PROJECT TEAM

<u>Property Owner:</u>	Bentella LLC 3132 Tiger Run Court Suite 101 Carlsbad, CA 92010
<u>Architectural Design:</u>	KSW Architects 143 N 1st Street Ashland, OR 97520
<u>Land Surveying:</u>	Hoffbuhr & Associates Inc. 880 Golf View Dr Suite 201 Medford, OR 97504
<u>Civil Engineering:</u>	Powell Engineering & Consulting 44 N Front Street, Suite 200 Medford, OR 97501
<u>Landscape Architecture:</u>	Terrain Landscape Architecture 310 Oak Street, Unit #3 Ashland, OR 97520
<u>Land Use Consultation:</u>	Rogue Planning & Development Services 1314-B Center Dr., PMB #457 Medford, OR 97501

Project Overview



Subdivision

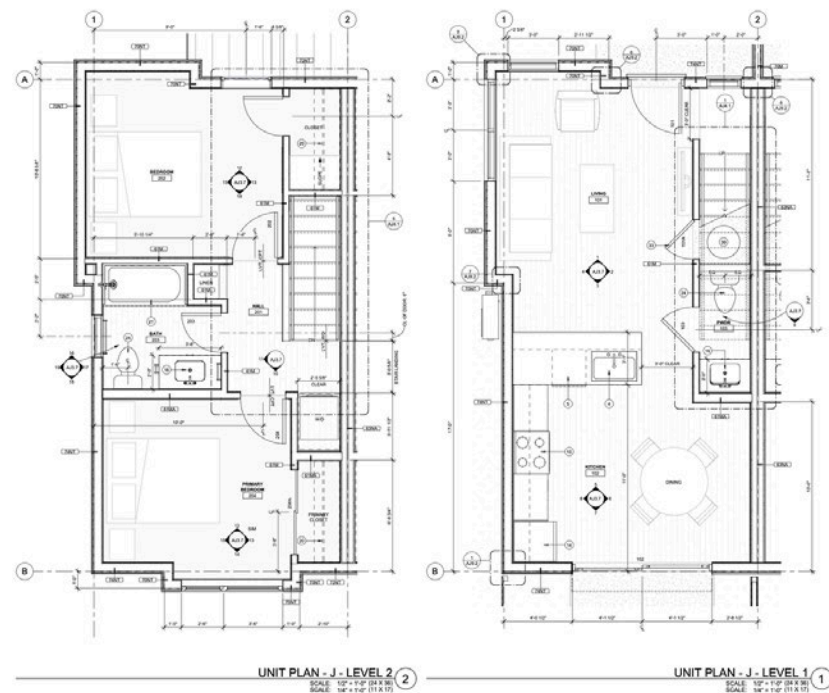
The approved subdivision at 300 Clay Street consists of a comprehensive residential development of 29 lots. This includes four, four-plex buildings (16 total units), along with twenty-one single-family residential lots, internal public streets, utilities, stormwater facilities, and open space. Two of the four-plex buildings, totaling eight units, are designated as deed restricted affordable rental housing.

The affordable housing buildings are located on Lots 22 and 25 and are fully integrated into the subdivision design, infrastructure, and vehicle and pedestrian circulation pattern. The remaining two four-plexes will be developed as market-rate housing.

The affordable housing buildings are planned to be the first vertical construction within the subdivision following the completion of roads and core infrastructure. This ensures early delivery of affordable units to the community.

The project demonstrates a high level of readiness: - City Council approval has been granted - Subdivision infrastructure construction (including roads) has commenced - Building permit applications for the four-plex buildings have already been submitted - Final architectural and site plans for the affordable units are complete and attached.

Project Overview (continued)



Affordable Housing Summary

- Number of Affordable Units: 8
- Building Type: Two four-plex residential buildings
- Number of bedrooms: Two per unit (16 total bedrooms)
- Location within Subdivision: Lots 22 and 25
- Tenure: Rental housing
- Target Income Level: 80% Area Median Income (AMI)
- Affordability Term: 30 years

The affordable units will be rented to income-qualified households earning no more than 80% AMI, with rents restricted in accordance with City of Ashland requirements. The units will remain affordable for a minimum of 30 years, ensuring long-term public benefit and consistency with AHTF scoring priorities.

The units are designed to accommodate families and residents of all ages and will be supported by shared neighborhood amenities, including community BBQ areas, picnic tables, lawn and playground areas, covered bicycle parking, and abundant EV charging infrastructure.

All construction within the subdivision will meet stringent Firewise standards, supporting wildfire resilience and long-term community safety.

The affordable units will be constructed to the same exterior design standards, materials, and overall quality as the market-rate units within the subdivision, ensuring visual compatibility and long-term durability.

TIMELINE

Land Use Approval – Completed	• The full subdivision, including the affordable units, received City Council approval in 2025.
Infrastructure Construction – Ongoing	• Roads and utilities are currently under construction and are expected to be completed by April 2026.
Building Permits – In Review	• Permit applications for both affordable four-plexes have been submitted and are anticipated to be approved by February 2026.
Vertical Construction – Spring/Summer 2026	• Construction of the affordable units will begin immediately after infrastructure completion and permit issuance. These buildings will be the first constructed within the subdivision.
Estimated Completion – October 2026	• Both four-plex buildings are projected to be completed and ready for occupancy by October 2026.

The affordable housing component of the Caldera Oaks Subdivision is positioned for efficient delivery due to the project’s advanced status and clear sequencing.

FUNDING & BUDGET

Bentella LLC is requesting \$200,000 in Affordable Housing Trust Fund assistance, representing the maximum award available under the 2026 funding cycle. The requested funds will support the construction of eight affordable rental units that will remain deed-restricted at 80% AMI for a minimum of 30 years.

The requested AHTF funds represent well under 50% of the total cost of the affordable housing component (9%), consistent with AHTF match requirements.

PROJECT AND INITIATIVE	ESTIMATED VALUE FOR AFFORDABLE UNITS
Lot, Site & Infrastructure	\$510,550
Vertical Construction	\$1,570,600
Soft Costs (Design, Engineering, Legal, etc.)	\$60,747
Permits & SDCs	\$49,525
TOTAL	\$2,191,422
AHTF Request	\$200,000
Percentage of matching funds	9%

Use of Funds

AHTF funds are to be applied toward eligible costs associated with the construction of the affordable units, which include: - Vertical construction costs - Site and utility improvements serving the affordable units - Permit and system development charges

Match Funding

The remaining project costs will be funded through a combination of traditional bank lending and private funding. No other grants are being applied for.

Consistency with Ashland Housing Needs & City Policy

Ashland's Housing Needs Analysis and Consolidated Plan identify a critical shortage of affordable rental housing for households earning between 60% and 80% AMI, particularly for multi-bedroom units suitable for working households and families. Rising land, construction, and infrastructure costs have further constrained the private market's ability to deliver this housing without public participation.

This project directly addresses these documented needs by: - Delivering eight new affordable rental units at 80% AMI, a segment explicitly identified as underserved - Providing affordable housing within a new, centrally located subdivision inside the Ashland Urban Growth Boundary - Ensuring long-term affordability (30 years) through recorded covenants - Integrating affordable units within a mixed-income neighborhood, supporting equitable housing distribution - Leveraging significant private investment to maximize the impact of limited AHTF funds.

By funding units that are already moving into construction, the City's investment will result in near-term housing delivery, directly advancing the goals of the Affordable Housing Trust Fund, the Consolidated Plan, and the Housing Needs Analysis.



Energy Efficiency & Sustainability

The affordable housing units will incorporate several energy-efficient and sustainable design elements that reduce long-term operating costs for residents and support the City of Ashland's environmental goals. The following features are planned:

- **Solar-Ready Construction:** Buildings will be designed to accommodate future solar panel installation, including roof load capacity, conduit pathways, and electrical panel readiness.
- **High-Efficiency Appliances:** All units will include modern, energy-efficient appliances to reduce electricity consumption and lower tenant utility bills.
- **SEER 21 Heating and Cooling Systems:** High-efficiency HVAC systems will provide superior energy performance and occupant comfort, significantly reducing energy demand compared to standard equipment.
- **Metal Roofing:** Durable, reflective metal roofing will improve building longevity and contribute to lower cooling loads during peak summer months.
- **Drought-Tolerant Landscaping:** Low-water landscaping will be installed around both four-plex buildings, reducing ongoing irrigation needs and supporting sustainable site design practices.





Community Partnerships, Efficient Use of Resources, and Resident Stability

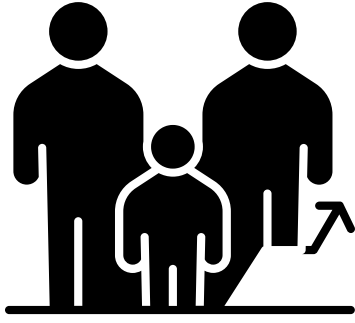
Community Partnerships

The applicant intends to partner with **ACCESS (Community Action Agency)** to support long-term housing stability for residents of the affordable units. ACCESS is a well-established regional nonprofit that provides housing assistance, housing stabilization services, and the **Rent Well** tenant education program, which helps households build skills needed for successful long-term tenancy.

ACCESS' offices are located adjacent to the 300 Clay Street property, creating a unique opportunity to connect residents with nearby services and ongoing support. The proposed partnership includes:

- **Property Management:** ACCESS is anticipated to provide professional property management services for the affordable units.
- **Rent Well Classes:** Residents will have access to Rent Well education to support tenant readiness, financial stability, and successful tenancy.
- **Affordable Housing Provider Network:** Bentella LLC plans to participate in ACCESS' network of affordable housing providers, helping connect income-qualified households with available units.

This partnership creates a symbiotic ecosystem in which the development provides new deed-restricted housing while ACCESS delivers tenant education, property management, and housing stabilization resources. This collaboration strengthens long-term housing outcomes, reduces turnover risk, and supports residents in maintaining stable housing.



Community Partnerships, Efficient Use of Resources, and Resident Stability (continued)

Efficient Use of Existing Resources and Non-Duplication of Services

This project utilizes existing City approvals, subdivision infrastructure, and established development processes to deliver new affordable housing units in an efficient and cost-effective manner. Affordable Housing Trust Fund assistance will be applied directly toward the construction of housing units rather than the provision of housing services or programs.

As such, the project complements the work of nonprofit housing providers and service organizations operating within Ashland. By focusing on the production of new deed-restricted rental units, the project fills a distinct and documented housing need while allowing service-oriented organizations to continue focusing on housing stability, navigation, and support services.

Minimization of Resident Relocation

The project minimizes resident displacement to the greatest extent possible. While the subdivision site previously contained a single house with one tenant, the applicant ensured that the tenant was fully supported during the transition. The tenant was offered free temporary housing until the house was demolished, and was provided with several months' advance notice to allow adequate time to secure alternate long-term housing.

At the time vertical construction begins, the site will be vacant and no additional relocation will be required. As a result, relocation assistance costs do not apply to the affordable housing component of this project.

APPENDIX

The partial construction document set which includes site plans, floor plans, elevations, and renderings can be found on the following pages.

CALDERA OAKS: BUILDING J

BENTELLA LLC

ksw

ARCHITECTS

66 WATER STREET
SUITE 101
ASHLAND, OR
97520
TEL.: 541.488.8200

CONSTRUCTION
DOCUMENTS

CALDERA OAKS: BUILDING J

BENTELLA LLC
300 CLAY ST.
ASHLAND OR. 97520

REVISIONS

COVER

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

GJ0.0





MULTIFAMILY LOT COVERAGE

LOT 22
LOT AREA: 5,439 SF
COVERAGE: 2,393 SF
% OF LOT AREA: 44%

LOT 23
LOT AREA: 5,839 SF
COVERAGE: 2,393 SF
% OF LOT AREA: 41%

LOT 24
LOT AREA: 5,433 SF
COVERAGE: 2,393 SF
% OF LOT AREA: 44%

LOT 24
LOT AREA: 4,424 SF
COVERAGE: 2,393 SF
% OF LOT AREA: 54%

BUILDING SCHEDULE

	BLDG	#OF BLDGS	UNITS/BLDG	UNIT AREA	GARAGE AREA	BUILDING AREA	TOTAL BUILDING AREA
	A	3	1	1,325 SF	-	1,325 SF	3,975 SF
	B	2	1	1,314 SF	-	1,314 SF	2,628 SF
	C	5	1	1,622 SF	-	1,622 SF	8,110 SF
	D	6	2	1,017 SF	-	2,034 SF	12,204 SF
	E	5	1	865 SF	-	865 SF	4,325 SF
	F	6	1	521 SF	510 SF	1,031 SF	6,186 SF
	G	2	1	585 SF	516 SF	1,101 SF	2,202 SF
	H	6	-	-	610 SF	610 SF	3,660 SF
	J	4	4	917 SF	-	3,670 SF	14,680 SF
	K	7	1	540 SF	299 SF	839 SF	5,873 SF

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 = 52 SPACES
OFF-STREET SURFACE PARKING = 14 SPACES
OFF-STREET GARAGE PARKING = 35 SPACES
TOTAL - 101 SPACES

SITE AREA

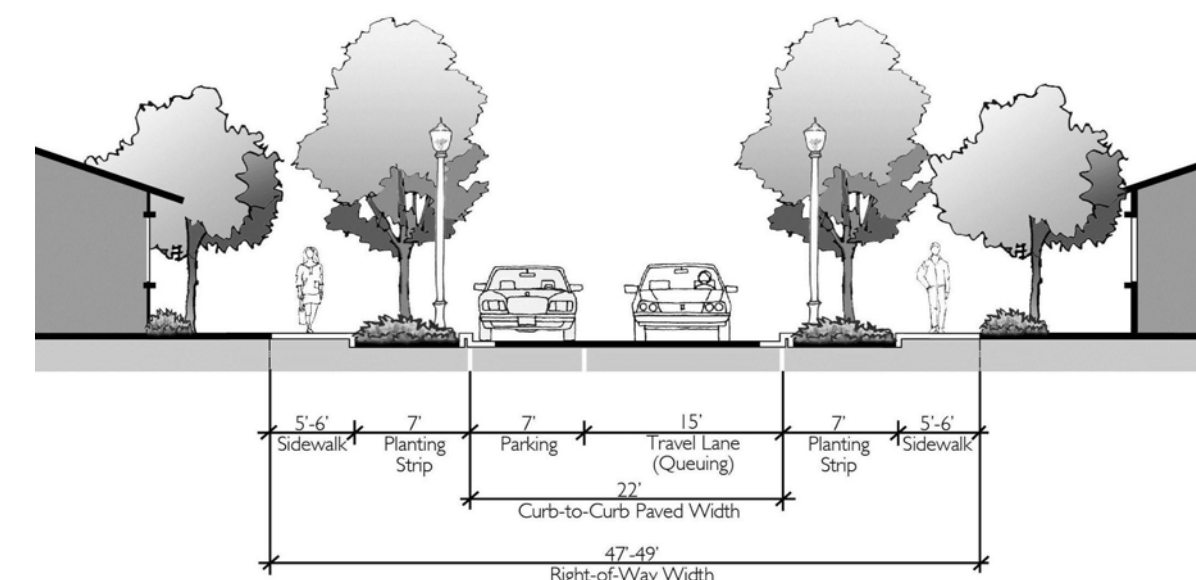
SITE AREA = 209,088 SF

OPEN SPACE

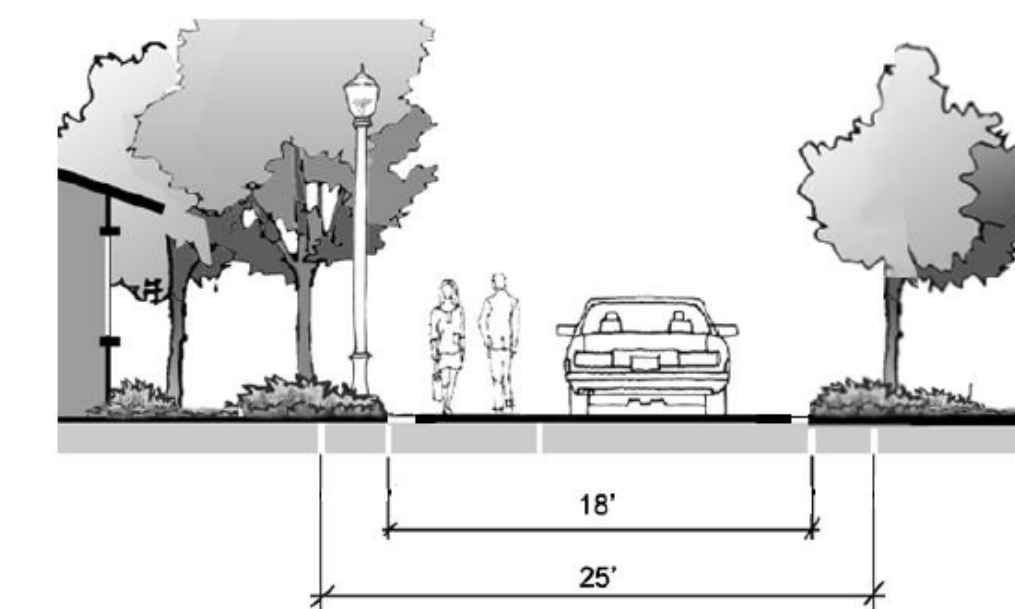
2,934 SF
1,414 SF
3,782 SF
7,972 SF
TOTAL 16,102 SF

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

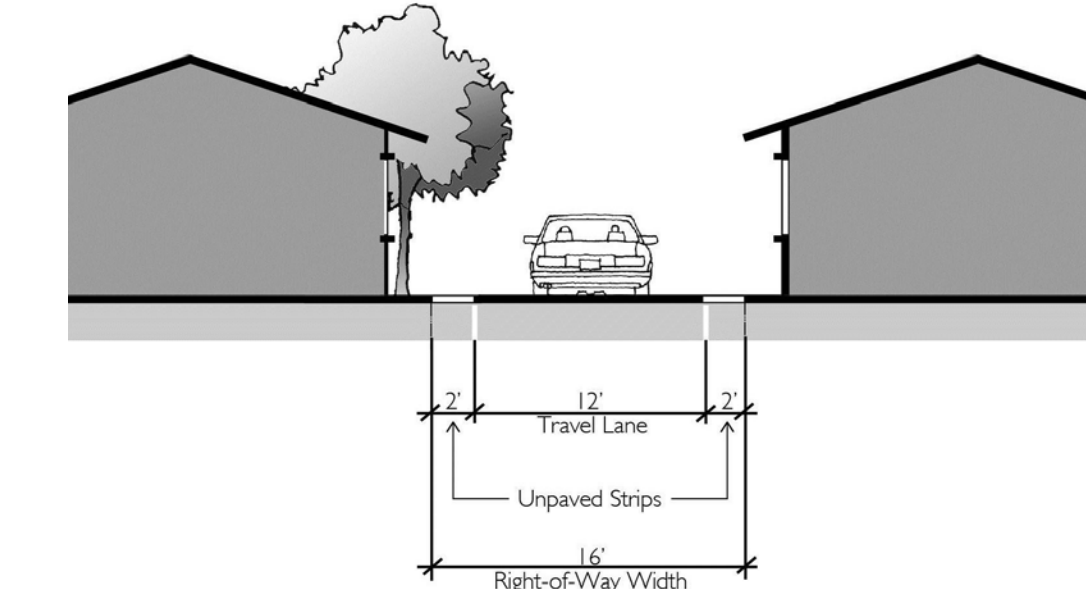
Neighborhood Street - Figure 18.4.6.040.G.4.b



Shared Street - Figure 18.4.6.040.G.8



Alley - Figure 18.4.6.040.G.6



ksw
ARCHITECTS

66 WATER STREET
SUITE 101
ASHLAND, OR
97520
TEL.: 541.488.8200

95% CD

REGISTERED ARCHITECT
RAYMOND J. KISTLER
3172
ASHLAND, OREGON
STATE OF OREGON

SHEET FORMAT = 24" X 36"

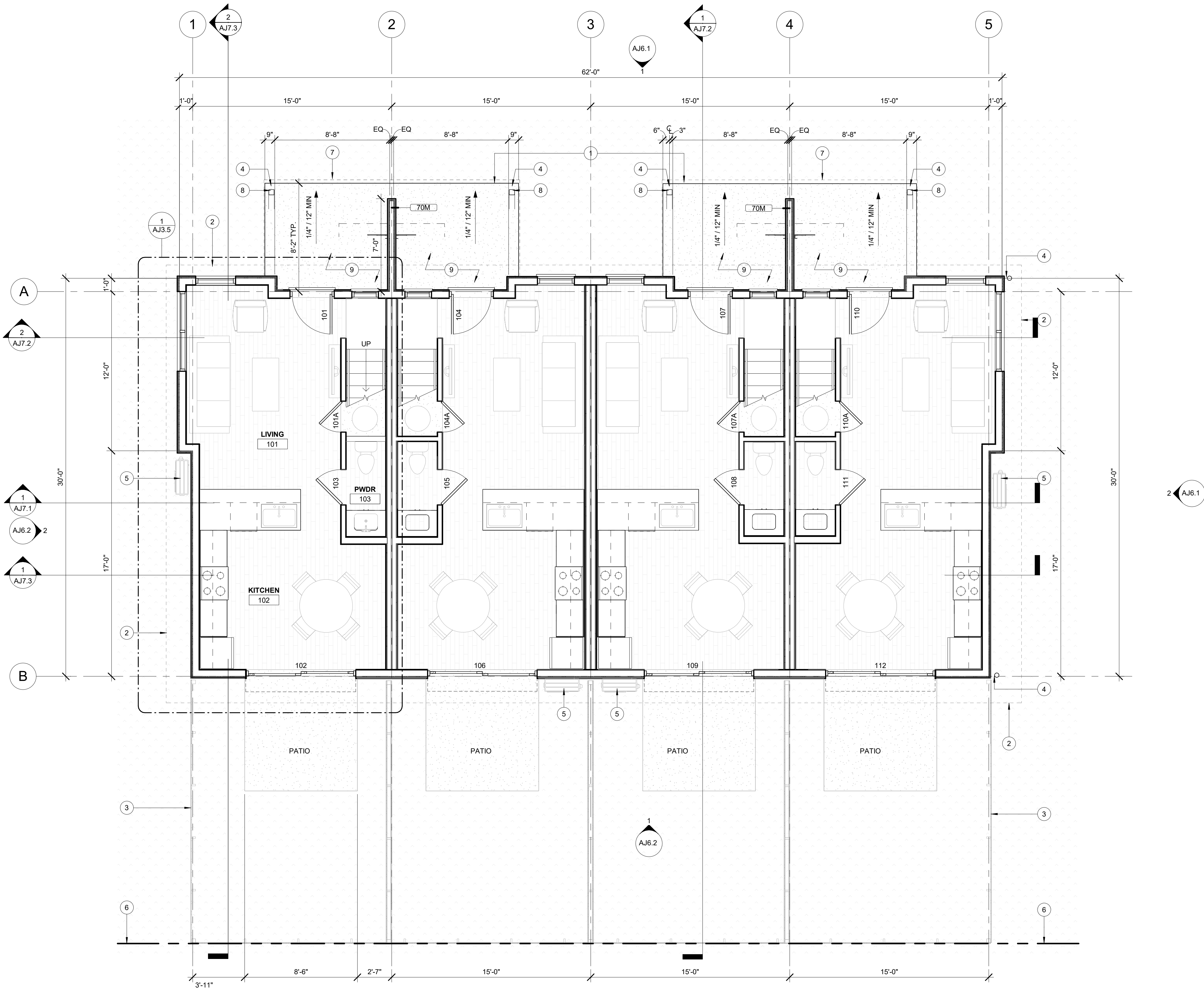
CALDERA OAKS
SITE LAYOUT
BENTELLA DEVELOPMENT
300 CLAY STREET
ASHLAND, OR 97520

REVISIONS

SITE PLAN

PROJECT NO.: 25-010
ISSUE DATE: 08.15.2025
SHEET:

A0.1



GENERAL NOTES - FLOOR PLANS

- A. FLOOR PLAN KEYNOTES APPLY TO SHEETS AJ3.1 - AJ3.2. ALL KEYNOTES MAY NOT OCCUR ON THIS SHEET AND DO NOT APPLY TO ANY OTHER SHEETS EXCEPT THOSE NOTED.
- B. ARCHITECTURAL REFERENCE ELEVATION 0" = (SEE CIVIL DRAWINGS FOR ELEVATIONS).
- C. SEE A1.1 - A1.3 FOR ASSEMBLIES AND DIMENSION SET POINTS.
- D. GRIDS ARE FOR REFERENCE ONLY. CONTRACTOR TO SET CONTROL POINTS FOR LAYOUT.
- E. REFERENCE SHEET AJ12.4 FOR DETAILS OF TRANSITIONS BETWEEN FLOORING MATERIALS.
- F. FURNITURE, FIXTURES, AND EQUIPMENT SHOWN FOR REFERENCE ONLY.
- G. REFERENCE SHEET A11.1 FOR ROOM FINISH INFORMATION.
- H. CLEAR DISTANCE AT HINGE SIDE OF ALL DOOR JAMBS ARE TO BE 4" FROM ADJOINING WALL, UNLESS NOTED OTHERWISE.
- I. WINDOW OPENING DIMENSIONS SHOWN ARE TO THE ROUGH OPENING. REFER TO SPECIFIC DETAILS FOR REQUIRED CLEARANCES FROM THE ROUGH OPENING TO THE WINDOW UNIT.

KEYNOTES - FLOOR PLANS

- 1 ALIGN
- 2 ROOF OVERHANG ABOVE
- 3 PRIVACY FENCE, SEE LANDSCAPE
- 4 07 62 00 - DOWNSPOUT
- 5 22 00 00 - WALL MOUNTED AIR CONDITION UNIT
- 6 PROPERTY LINE
- 7 BUILDING CANOPY ABOVE
- 8 STEEL POST, SEE STRUCTURAL
- 9 03 30 00 - EXTERIOR CONCRETE PORCH SLAB, REFER TO STRUCTURAL. MINIMUM 1/4" / 12" SLOPE (2%) AT CONCRETE PATIO. FEATHER SLAB AS NECESSARY TO MAINTAIN POSITIVE SLOPE AWAY FROM BUILDING, TYP.



66 WATER STREET
SUITE 101
ASHLAND, OR
97520
TEL.: 541.488.8200

CONSTRUCTION
DOCUMENTS



CALDERA OAKS: BUILDING J

BENTELLA LLC
300 CLAY ST.
ASHLAND OR. 97520

REVISIONS

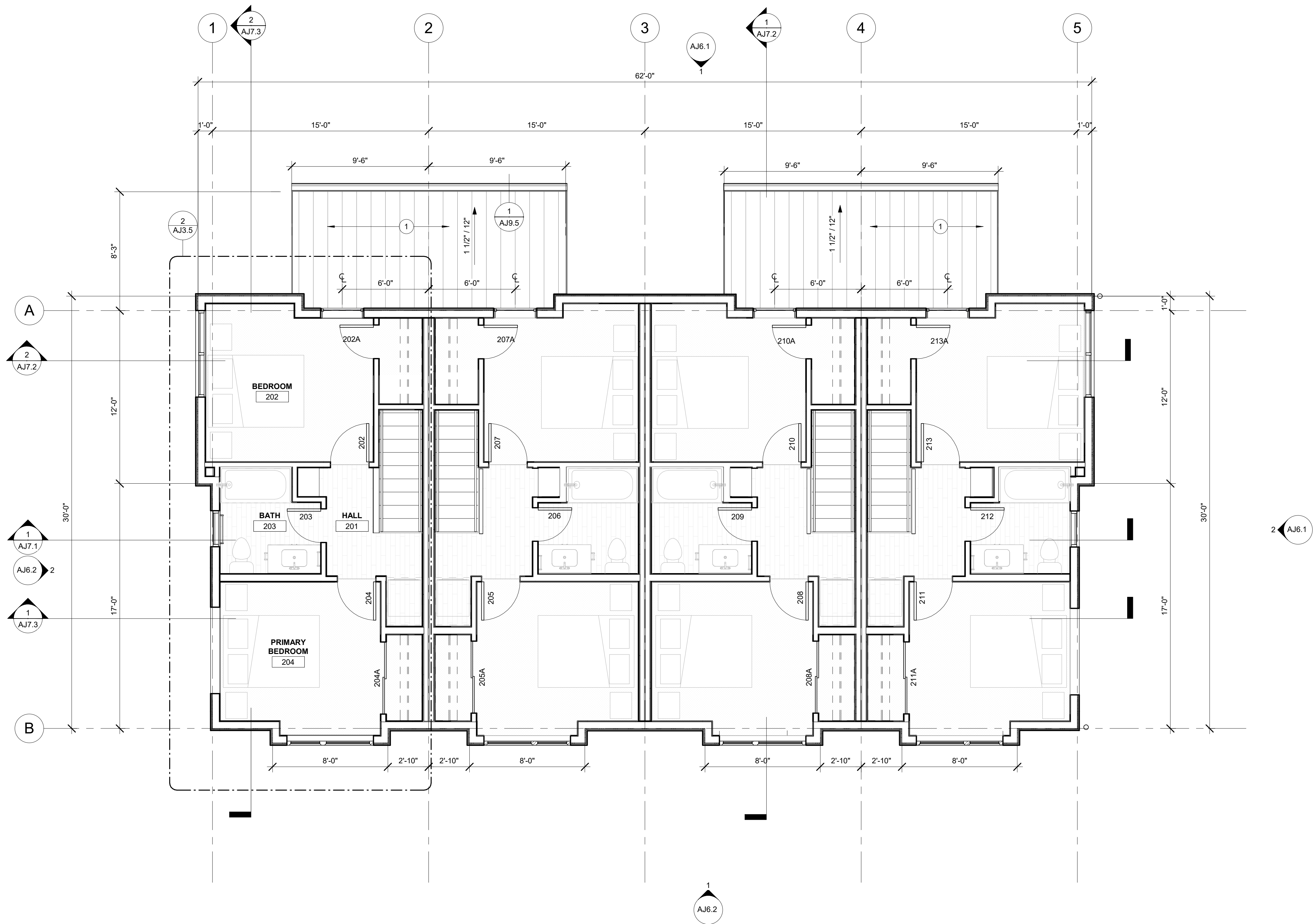
PLAN - LEVEL 1

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

AJ3.1

PLAN - LEVEL 1

SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)



PLAN - LEVEL 2

SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

GENERAL NOTES - FLOOR PLANS

- A. FLOOR PLAN KEYNOTES APPLY TO SHEETS AJ3.1 - AJ3.2. ALL KEYNOTES MAY NOT OCCUR ON THIS SHEET AND DO NOT APPLY TO ANY OTHER SHEETS EXCEPT THOSE NOTED.
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- E. REFERENCE SHEET AJ12.4 FOR DETAILS OF TRANSITIONS BETWEEN FLOORING MATERIALS.
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- H. CLEAR DISTANCE AT HINGE SIDE OF ALL DOOR JAMBS ARE TO BE 4" FROM ADJOINING WALL, UNLESS NOTED OTHERWISE.
- I. WINDOW OPENING DIMENSIONS SHOWN ARE TO THE ROUGH OPENING. REFER TO SPECIFIC DETAILS FOR REQUIRED CLEARANCES FROM THE ROUGH OPENING TO THE WINDOW UNIT.

KEYNOTES - FLOOR PLANS

- 1 ALIGN
- 2 ROOF OVERHANG ABOVE
- 3 PRIVACY FENCE, SEE LANDSCAPE
- 4 07 62 00 - DOWNSPOUT
- 5 22 00 00 - WALL MOUNTED AIR CONDITION UNIT
- 6 PROPERTY LINE
- 7 BUILDING CANOPY ABOVE
- 8 STEEL POST, SEE STRUCTURAL
- 9 03 30 00 - EXTERIOR CONCRETE PORCH SLAB. REFER TO STRUCTURAL. MINIMUM 1/4" / 12" SLOPE (2%) AT CONCRETE PATIO, FEATHER SLAB AS NECESSARY TO MAINTAIN POSITIVE SLOPE AWAY FROM BUILDING, TYP.



66 WATER STREET
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CONSTRUCTION
DOCUMENTS



CALDERA OAKS: BUILDING J

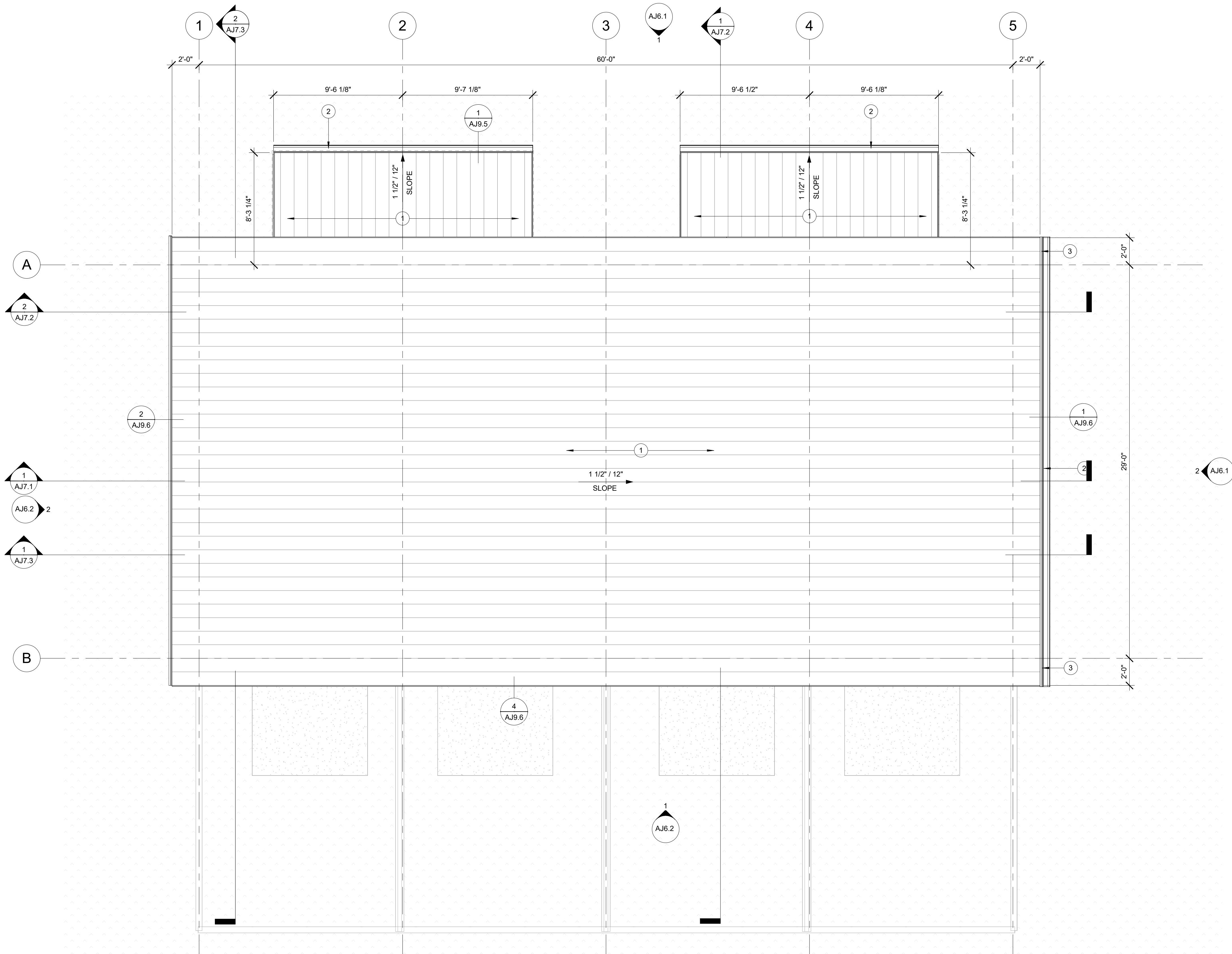
BENTELLA LLC
300 CLAY ST.
ASHLAND OR. 97520

REVISIONS

PLAN - LEVEL 2

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

AJ3.2



GENERAL NOTES - ROOF PLAN

- A. ROOF PLAN KEYNOTES APPLY TO SHEET AC3.1. ALL KEYNOTES MAY NOT OCCUR ON THIS SHEET AND DO NOT APPLY TO ANY OTHER SHEETS EXCEPT THOSE NOTED.
- B. ARCHITECTURAL REFERENCE ELEVATION 0" = (SEE CIVIL DRAWINGS FOR ELEVATIONS).
- C. SEE A1.1 - A1.3 FOR ASSEMBLIES
- D. GRIDS ARE FOR REFERENCE ONLY. CONTRACTOR TO SET CONTROL POINTS FOR LAYOUT.

KEYNOTES - ROOF PLAN

- 1 07 41 13 - STANDING SEAM METAL ROOF PANELS (MP-1)
- 2 07 62 00 - GUTTER
- 3 07 62 00 - DOWNSPOUT



66 WATER STREET
SUITE 101
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DOCUMENTS



CALDERA OAKS: BUILDING J

BENTELLA LLC
300 CLAY ST.
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REVISIONS

ROOF PLAN

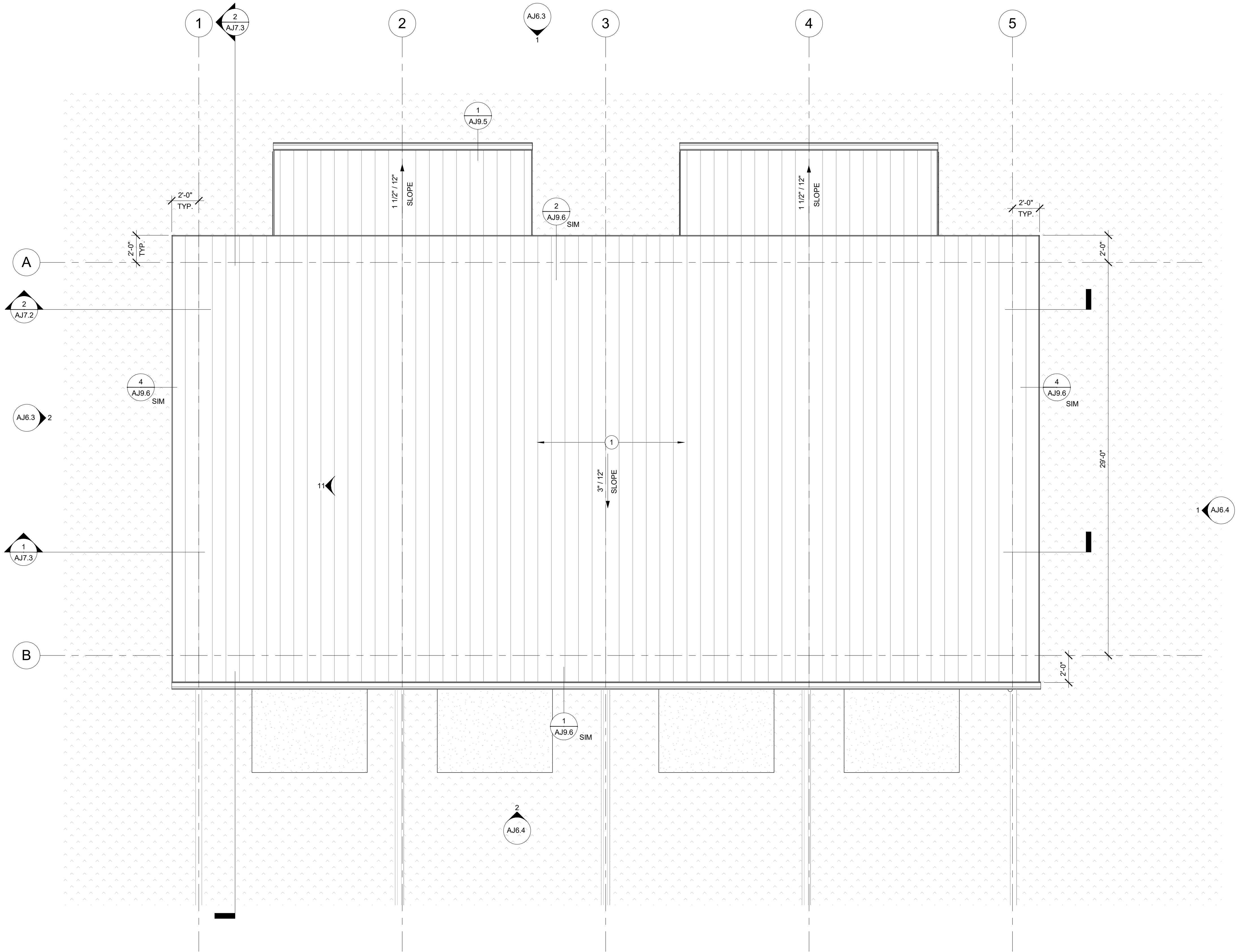
PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

AJ3.3

PLAN - ROOF

SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

1



PLAN - ROOF - LOT 25
SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

GENERAL NOTES - ROOF PLAN

- A. ROOF PLAN KEYNOTES APPLY TO SHEET AC3.1. ALL KEYNOTES MAY NOT OCCUR ON THIS SHEET AND DO NOT APPLY TO ANY OTHER SHEETS EXCEPT THOSE NOTED.
- B. ARCHITECTURAL REFERENCE ELEVATION 0" = (SEE CIVIL DRAWINGS FOR ELEVATIONS).
- C. SEE A1.1 - A1.3 FOR ASSEMBLIES
- D. GRIDS ARE FOR REFERENCE ONLY. CONTRACTOR TO SET CONTROL POINTS FOR LAYOUT.

KEYNOTES - ROOF PLAN

- 1 07 41 13 - STANDING SEAM METAL ROOF PANELS (MP-1)
- 2 07 62 00 - GUTTER
- 3 07 62 00 - DOWNSPOUT



66 WATER STREET
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CONSTRUCTION
DOCUMENTS



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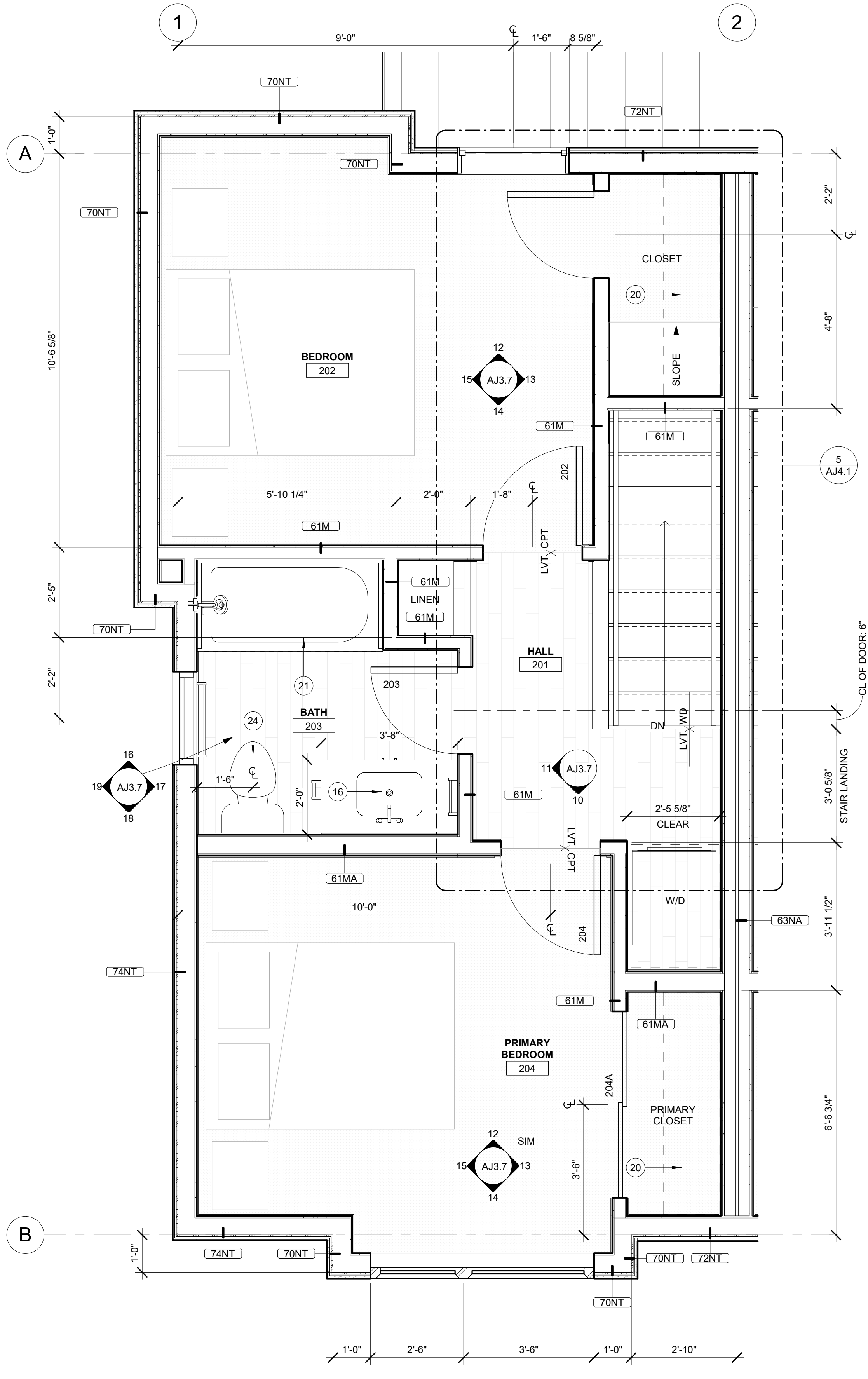
BENTELLA LLC
300 CLAY ST.
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REVISIONS

ROOF PLAN -
LOT 25

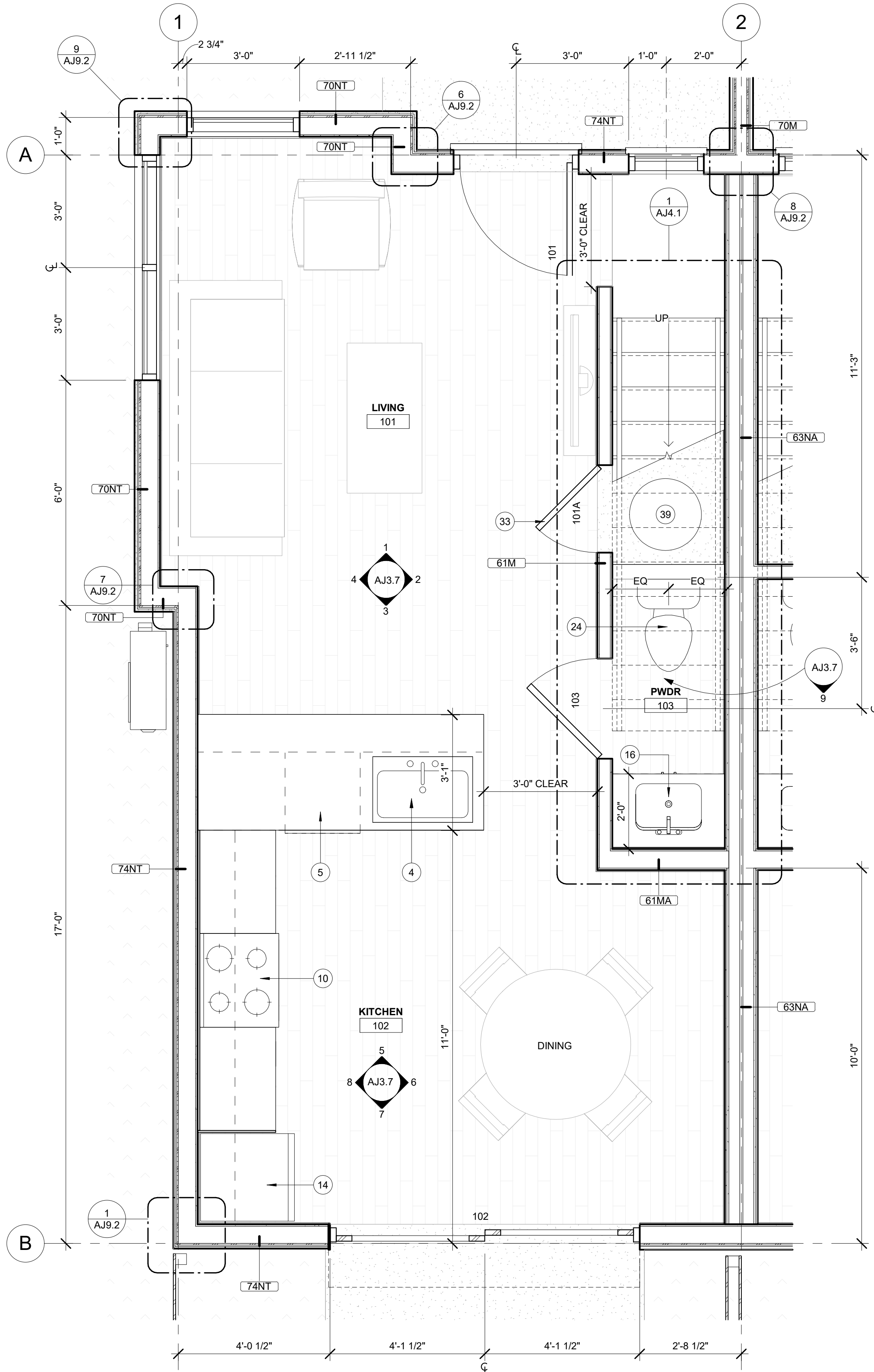
PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

AJ3.4



UNIT PLAN - J - LEVEL 2

SCALE: 1/2" = 1'-0" (24 X 36)
SCALE: 1/4" = 1'-0" (11 X 17)



UNIT PLAN - J - LEVEL 1

SCALE: 1/2" = 1'-0" (24 X 36)
SCALE: 1/4" = 1'-0" (11 X 17)

GENERAL NOTES - UNIT COMPOSITE

- UNIT COMPOSITE KEYNOTES APPLY TO SHEET AJ3.5 ALL KEYNOTES MAY NOT OCCUR ON THIS SHEET AND DO NOT APPLY TO ANY OTHER SHEETS EXCEPT THOSE NOTED.
- SEE GENERAL SHEETS FOR ADDITIONAL ACCESSIBILITY INFORMATION IF APPLICABLE.
- SEE AJ1.1 FOR ASSEMBLIES AND DIMENSION SET POINTS.
- GRIDS ARE FOR REFERENCE ONLY. CONTRACTOR TO SET CONTROL POINTS FOR LAYOUT.
- REFERENCE SHEET AJ12.5 FOR DETAILS OF TRANSITIONS BETWEEN FLOORING MATERIALS.
- FURNITURE, FIXTURES, AND EQUIPMENT SHOWN FOR REFERENCE ONLY.
- REFERENCE SHEET AJ11.1 FOR ROOM FINISH INFORMATION.
- CLEAR DISTANCE AT HINGE SIDE OF ALL DOOR JAMBS ARE TO BE 4" FROM ADJOINING WALL, UNLESS NOTED OTHERWISE.
- WINDOW OPENING DIMENSIONS SHOWN ARE TO THE ROUGH OPENING. REFER TO SPECIFIC DETAILS FOR REQUIRED CLEARANCES FROM THE ROUGH OPENING TO THE WINDOW UNIT.
- CASEWORK FABRICATION TO BE COORDINATED WITH APPLIANCES.
- CENTER LIGHT FIXTURES, J BOXES, AND SPRINKLER HEADS ON CEILING/SOFFIT, U.N.O.
- ALL CEILING HEIGHTS ARE RELATIVE TO FINISHED FLOOR, U.N.O.
- ACCESS PANEL LOCATIONS SHALL BE COORDINATED WITH THE ARCHITECT.
- BACK TO BACK OUTLET BOXES IN DEMISING WALLS ARE NOT ALLOWED. DEMISING WALL PENETRATIONS TO BE LIMITED TO REQUIRED INSTALLATIONS. ALL PENETRATIONS TO BE ACOUSTICALLY SEALED WITH AN OUTLET BOX "PUTTY PAD", OR EQUIVALENT SOUND ATTENUATION MEASURE.
- BLOCKING IS REQUIRED FOR INSTALLATION OF FUTURE GRAB BARS IN ALL UNIT BATHROOMS. REFER TO GENERAL SHEETS FOR ADDITIONAL UNIT ANSI ACCESS INFORMATION.

KEYNOTES - UNIT COMPOSITE

- ALIGN
- 06 41 00 - PLASTIC LAMINATE CASEWORK (PLAM-2)
- KITCHEN FAUCET (PF-10)
- KITCHEN SINK (PF-11)
- DISHWASHER (APP-9)
- 06 20 00 PAINTED WALL BASE (B-1)
- 09 21 16 PAINTED GYPSUM WALL BOARD (PT-1)
- 09 30 00 TILE BACKSPLASH (T-4)
- 10 28 00 - FRAMELESS MIRROR (ACC-6)
- OVEN (APP-8)
- 12 36 00 QUARTZ COUNTERTOP (SURF-3)
- 26 00 00 - WALL-MOUNTED LIGHT, CENTER ABOVE VANITY CABINET
- MICROWAVE VENT HOOD (APP-10)
- REFRIGERATOR (APP-7)
- 22 42 00 BATHROOM FAUCET PF-12)
- 22 42 00 UNDERMOUNT BATHROOM SINK (PF-4)
- 12 36 00 QUARTZ COUNTERTOP (SURF-4)
- 12 36 00 QUARTZ BACKSPLASH (SURF-4)
- WASHER (APP-11)
- DOUBLE CLOSET ROD AND SHELF.
- 22 42 00 TUB / SHOWER SURROUND (PF-13)
- 22 42 00 TUB / SHOWER TRIM KIT (PF-8)
- 10 28 00 - HAND TOWEL BAR, PROVIDE BLOCKING (ACC-3)
- 22 42 00 TOILET (PF-5)
- 06 41 00 BUILT IN SHELVING, PROVIDE BLOCKING (PLAM-1)
- 06 41 00 - PLASTIC LAMINATE CASEWORK UPPERS (PLAM-3)
- 06 41 00 - PLASTIC LAMINATE CASEWORK FRIDGE SURROUND (PLAM-2)
- 06 41 00 - PLASTIC LAMINATE CASEWORK END PANEL (PLAM-2)
- DECORATIVE WALL SCONCE (L-7)
- DECORATIVE PENDANT (L-6)
- ACCESS DOOR: 2'-4" X 4'-0", TYP.
- HVAC MINI-SPLIT INTERIOR SUPPLY UNIT.
- VAULTED CEILING @ B.O.S. - ADD ALT. DEDUCT: FLAT HARD LID CEILING TO MATCH OTHERS. TYP AT ALL TYPE J UNITS.
- 07 46 23 - 6" T&G ACETYLATED WOOD SOFFIT, MILL STAINED & FIELD COATED (WD-1)
- PROVIDE BLOCKING FOR GRAB BAR INSTALLATION
- 10 28 00 - TOWEL BAR, PROVIDE BLOCKING, (ACC-2)
- WATER HEATER
- 08 31 00 - 22.5" X 30" ATTIC ACCESS HATCH W/ LOCKABLE PANEL , PROVIDE CLEARANCE BELOW HINGE SIDE. ORIENT ACCESS HATCH SUCH THAT THE SHORTER DIMENTION CAN FIT BETWEEN ROOF TRUSSES. TYP AT EACH UNIT
- 10 28 00 - TOILET TISSUE HOLDER, PROVIDE BLOCKING, (ACC-4)
- 07 46 46 - FIBER CEMENT SOFFIT PANELS, PAINTED (FC-1)
- 07 46 23 - 2" CONTINUOUS SOFFIT VENT (TAMLYN VPCA2-BK), BLACK FINISH

ksw
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66 WATER STREET
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97520
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CONSTRUCTION
DOCUMENTS



CALDERA OAKS: BUILDING J

BENTELLA LLC
300 CLAY ST.
ASHLAND OR. 97520

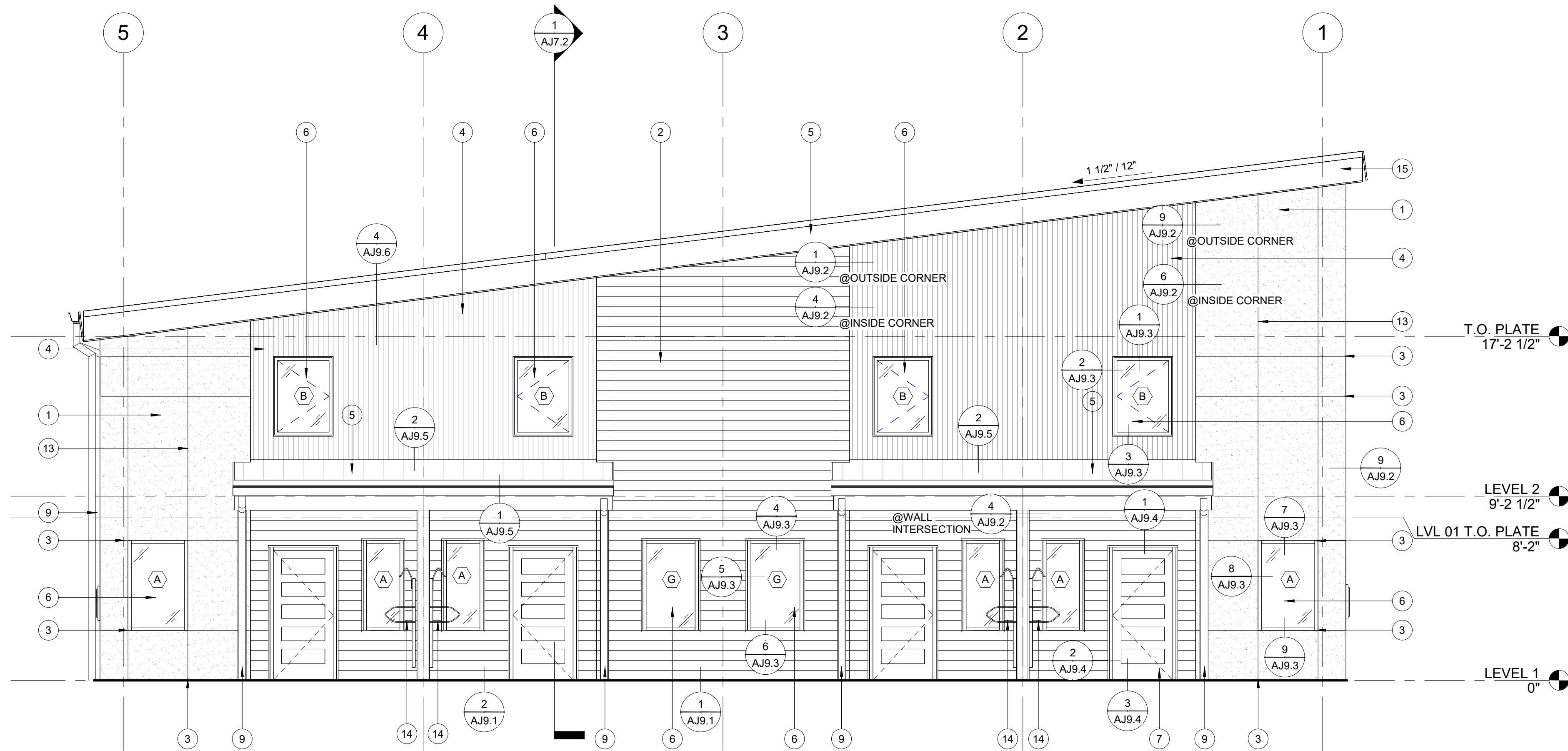
REVISIONS

UNIT
COMPOSITE -
UNIT J FLOOR
PLANS

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025

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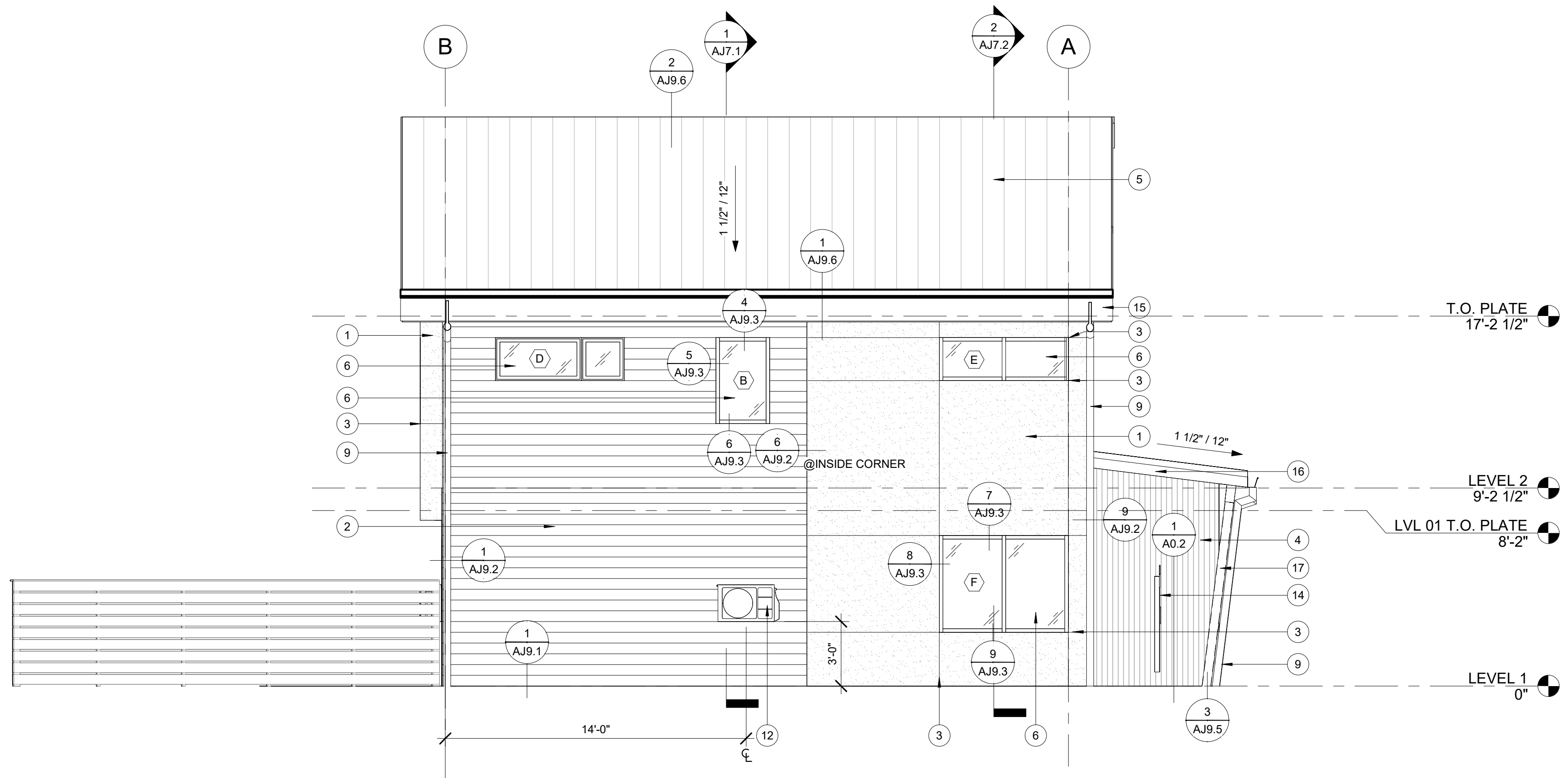
AJ3.5



EXTERIOR ELEVATION - EAST

SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

1



EXTERIOR ELEVATION - SOUTH

SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

2

GENERAL NOTES - EXT ELEVATIONS

- A. ELEVATION KEYNOTES APPLY TO SHEETS AJ6.1 - AJ6.4. ALL KEYNOTES MAY NOT OCCUR ON THIS SHEET AND DO NOT APPLY TO ANY OTHER SHEETS EXCEPT THOSE NOTED.
- B. SEE AJ1.1 FOR WALL ASSEMBLIES
- C. GRIDS ARE FOR REFERENCE ONLY. CONTRACTOR TO SET CONTROL POINTS FOR LAYOUT.

KEYNOTES - EXTERIOR ELEVATIONS

- 1 09 24 00 - PORTLAND CEMENT PLASTER (STUCCO) WHITE
- 2 07 46 23 - T&G ACETYLATED WOOD SIDING, MILL STAINED & FIELD COATED. 6" HORIZONTALLY ORIENTED (WD-1)
- 3 ALIGN CONTROL JOINTS WITH WINDOW OPENINGS
- 4 07 42 13 - CORRUGATED METAL WALL PANELS (MP-2)
- 5 07 41 13 - STANDING SEAM METAL ROOF PANELS (MP-1)
- 6 08 53 00 - VINYL WINDOWS, BLACK EXTERIOR WHITE INTERIOR. WDW-1
- 7 08 16 13 - FIBERGLASS ENTRY DOOR
- 9 07 62 00 - METAL DOWNSPOUT FINISHED TO MATCH ROOF
- 12 23 00 00 - OUTDOOR AIR CONDITIONING UNIT. MOUNT TO WALL PER MANUFACTURER'S RECOMMENDATION.
- 13 1/4" STUCCO CONTROL JOINTS
- 14 WALL MOUNTED BIKE LOCK, INSTALL BACKING PER MANUFACTURER SPECS.
- 15 07 46 46 - 1X16 FIBER CEMENT FASCIA, WHITE, (FC-1)
- 16 07 46 46 - 1X10 FIBER CEMENT FASCIA, WHITE, (FC-1)
- 17 05 12 00 - STEEL HSS COLUMN, PER STRUCTURAL, BLACK



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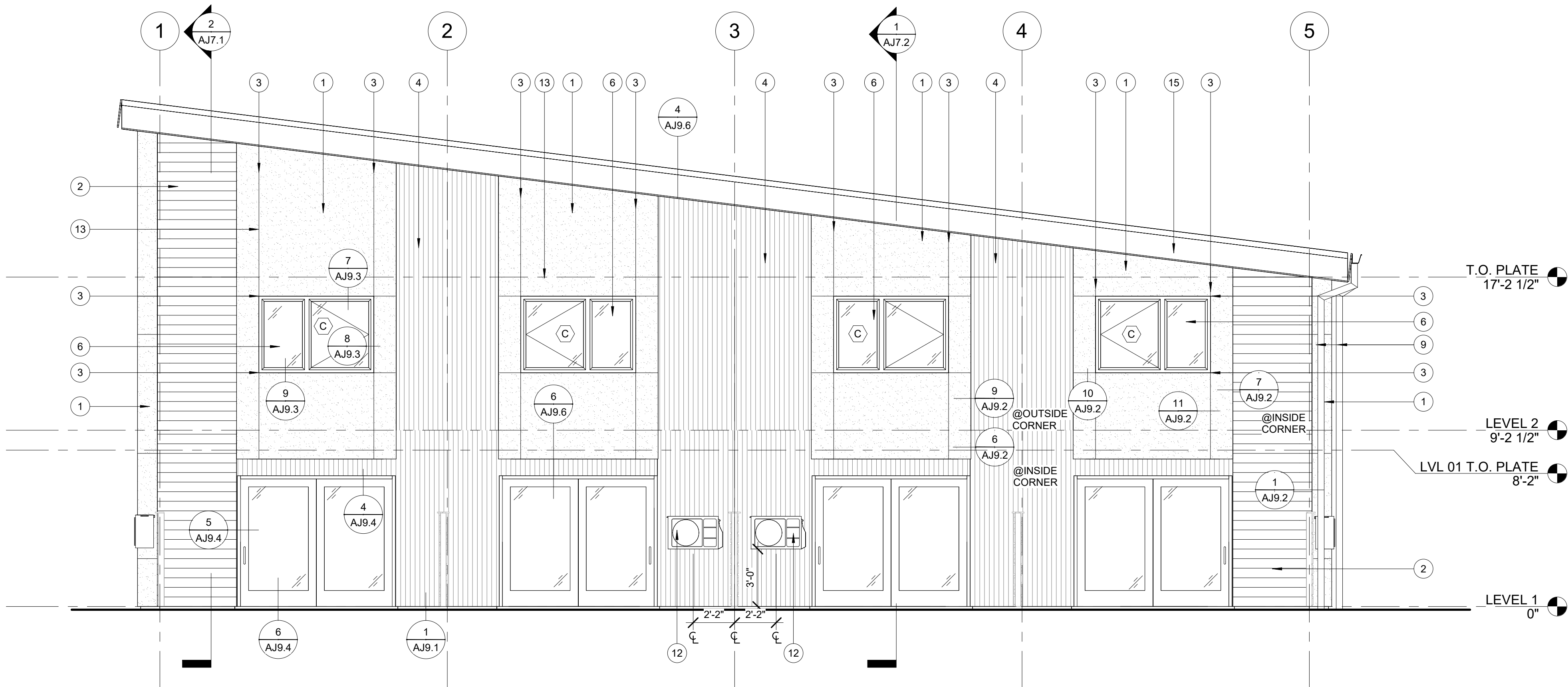
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300 CLAY ST.
ASHLAND OR. 97520

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EXTERIOR
ELEVATIONS

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

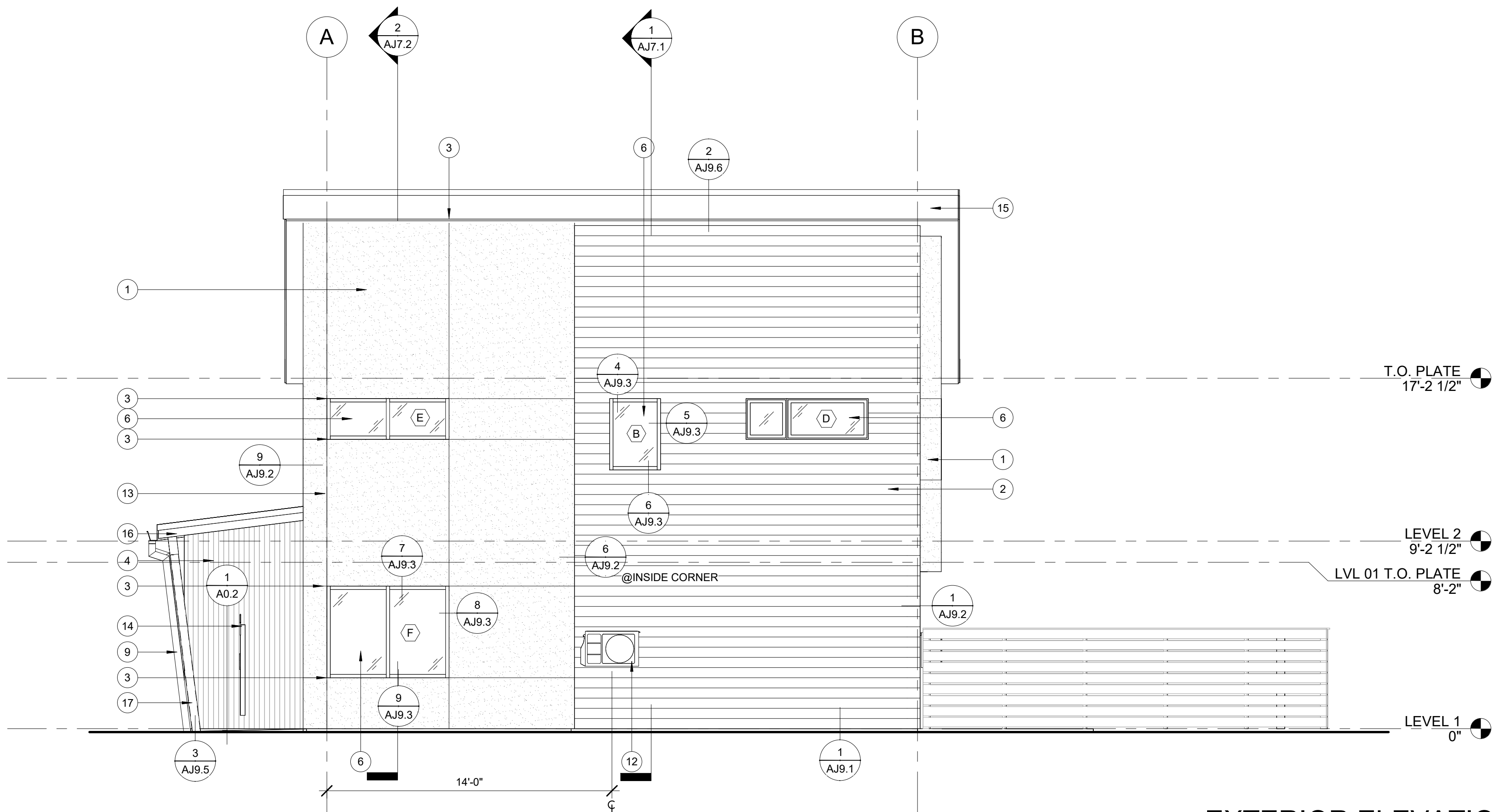
AJ6.1



EXTERIOR ELEVATION - WEST

SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

1



EXTERIOR ELEVATION - NORTH

SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

2

GENERAL NOTES - EXT ELEVATIONS

- A. ELEVATION KEYNOTES APPLY TO SHEETS AJ6.1 - AJ6.4. ALL KEYNOTES MAY NOT OCCUR ON THIS SHEET AND DO NOT APPLY TO ANY OTHER SHEETS EXCEPT THOSE NOTED.
- B. SEE AJ1.1 FOR WALL ASSEMBLIES
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KEYNOTES - EXTERIOR ELEVATIONS

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- 2 07 46 23 - T&G ACETYLATED WOOD SIDING, MILL STAINED & FIELD COATED. 6" HORIZONTALLY ORIENTED (WD-1)
- 3 ALIGN CONTROL JOINTS WITH WINDOW OPENINGS
- 4 07 42 13 - CORRUGATED METAL WALL PANELS (MP-2)
- 5 07 41 13 - STANDING SEAM METAL ROOF PANELS (MP-1)
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- 7 08 16 13 - FIBERGLASS ENTRY DOOR
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- 17 05 12 00 - STEEL HSS COLUMN, PER STRUCTURAL, BLACK

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CONSTRUCTION
DOCUMENTS

REGISTERED ARCHITECT
RAYMOND J. KISTLER
3172
ASHLAND, OREGON
STATE OF OREGON

CALDERA OAKS: BUILDING J

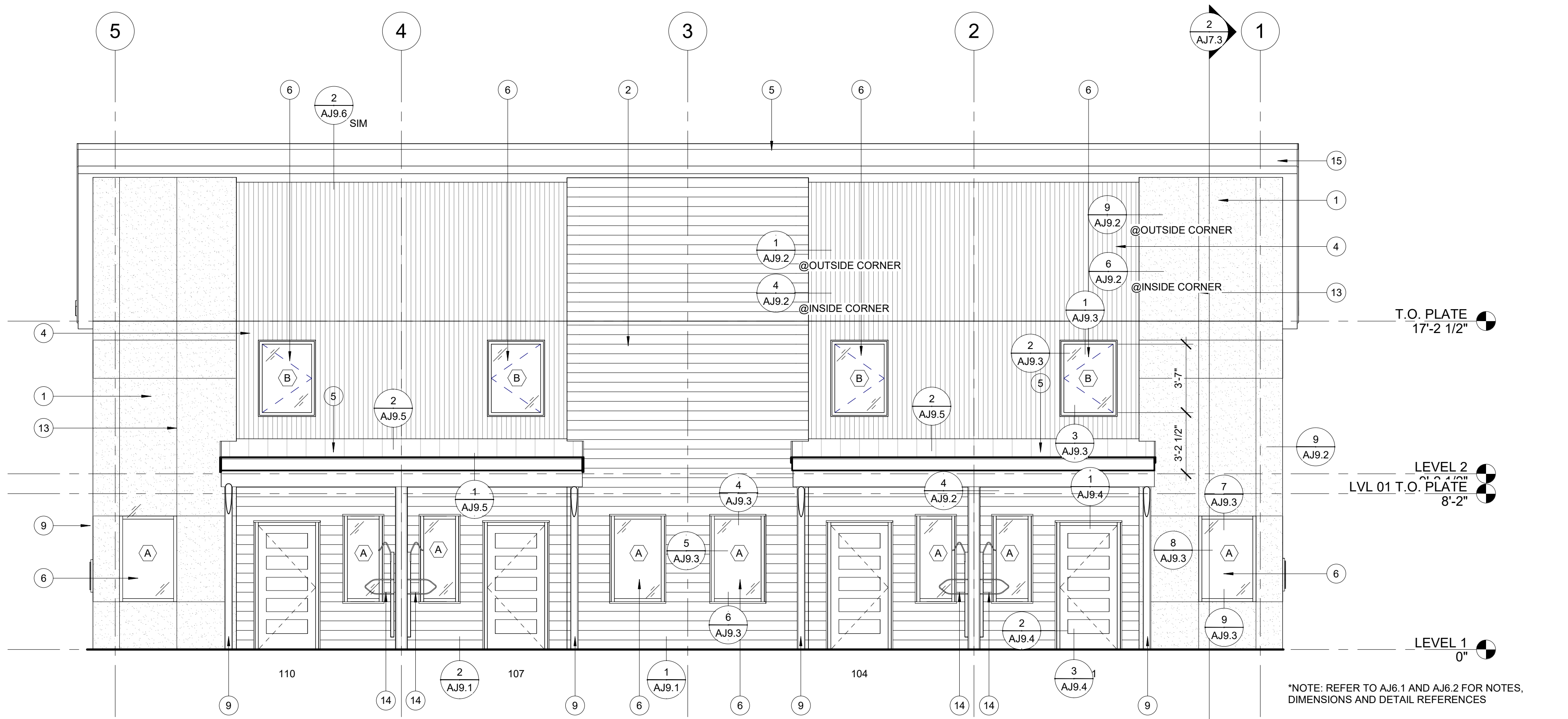
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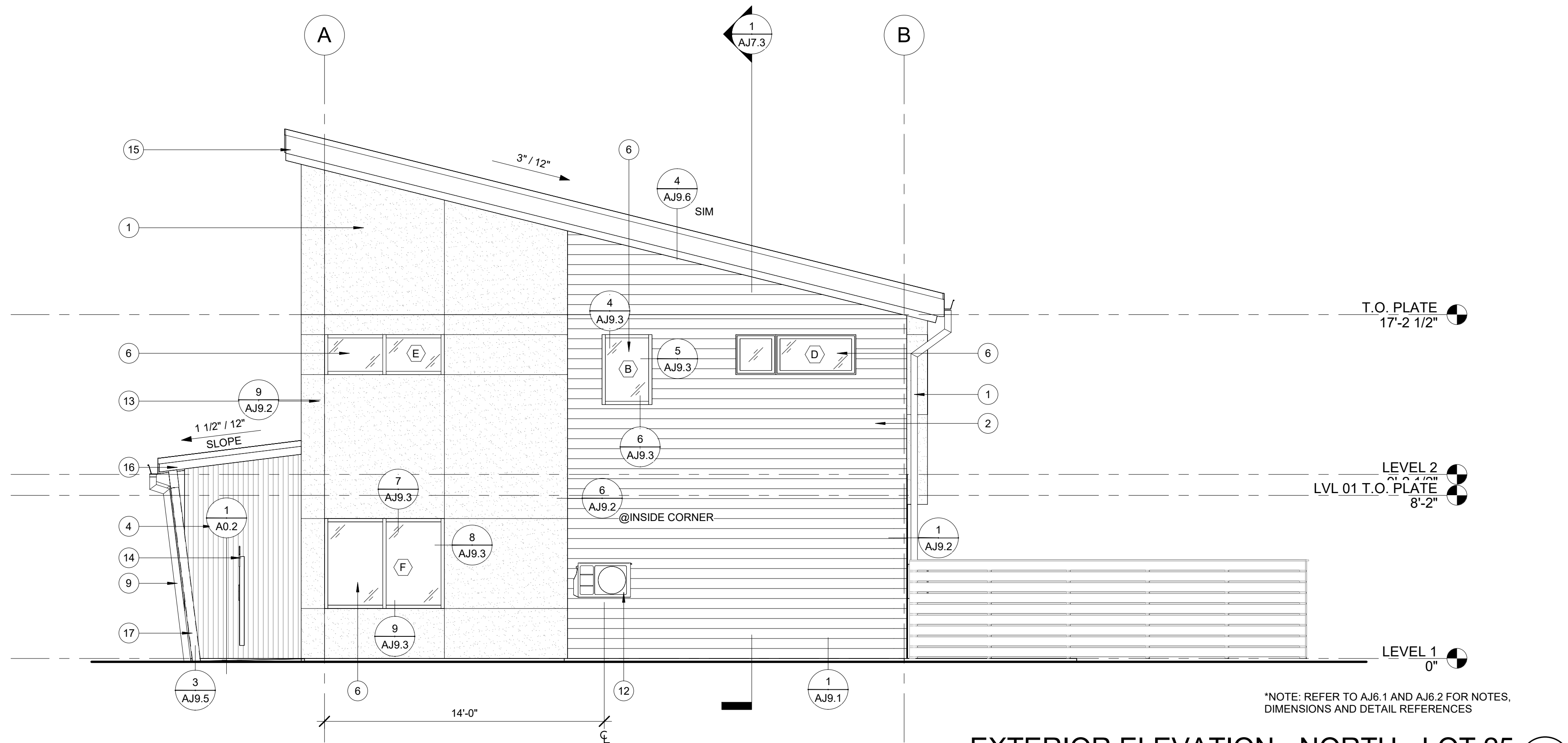
EXTERIOR
ELEVATIONS

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

AJ6.2



EXTERIOR ELEVATION - EAST - LOT 25 1
SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)



EXTERIOR ELEVATION - NORTH - LOT 25 2
SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

GENERAL NOTES - EXT ELEVATIONS

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KEYNOTES - EXTERIOR ELEVATIONS

- 1 09 24 00 - PORTLAND CEMENT PLASTER (STUCCO) WHITE
- 2 07 48 23 - T&G ACETYLATED WOOD SIDING, MILL STAINED & FIELD COATED, 6" HORIZONTALLY ORIENTED (WD-1)
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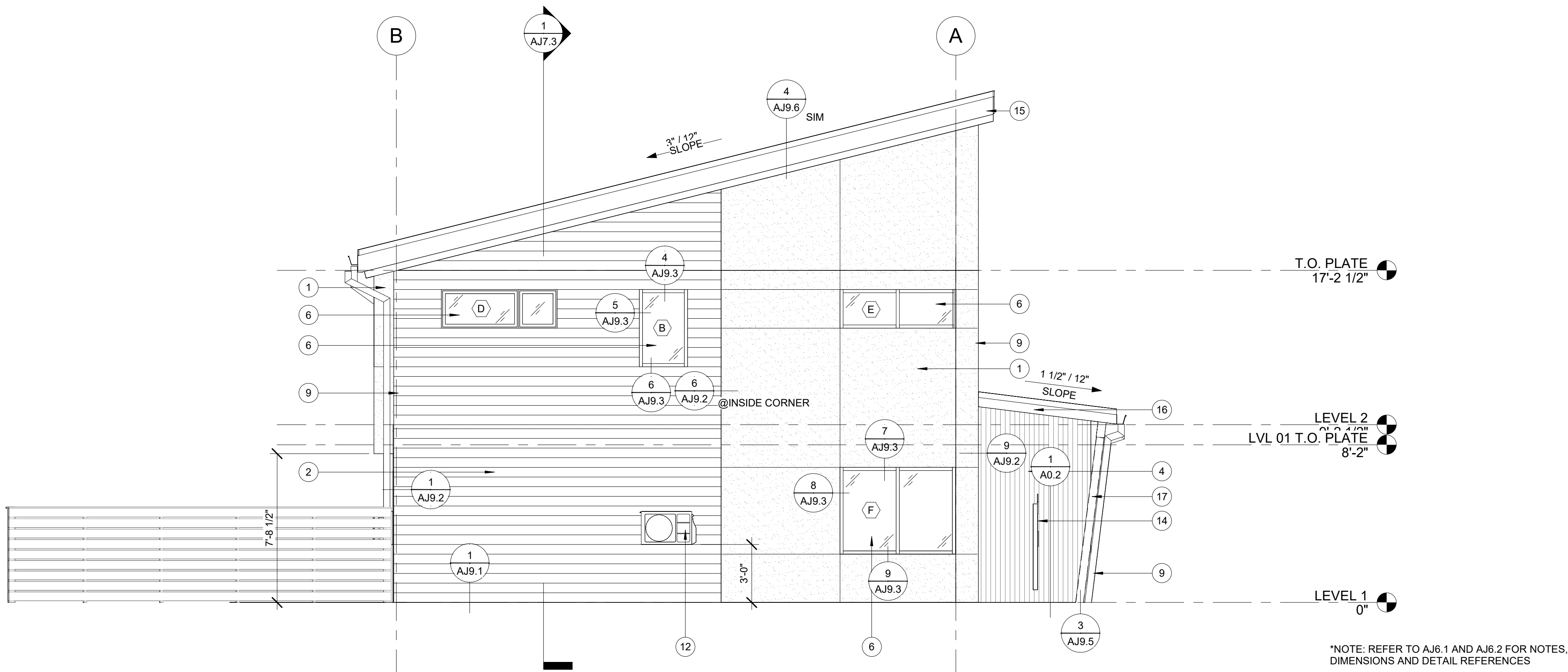
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EXTERIOR
ELEVATIONS -
LOT 25

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
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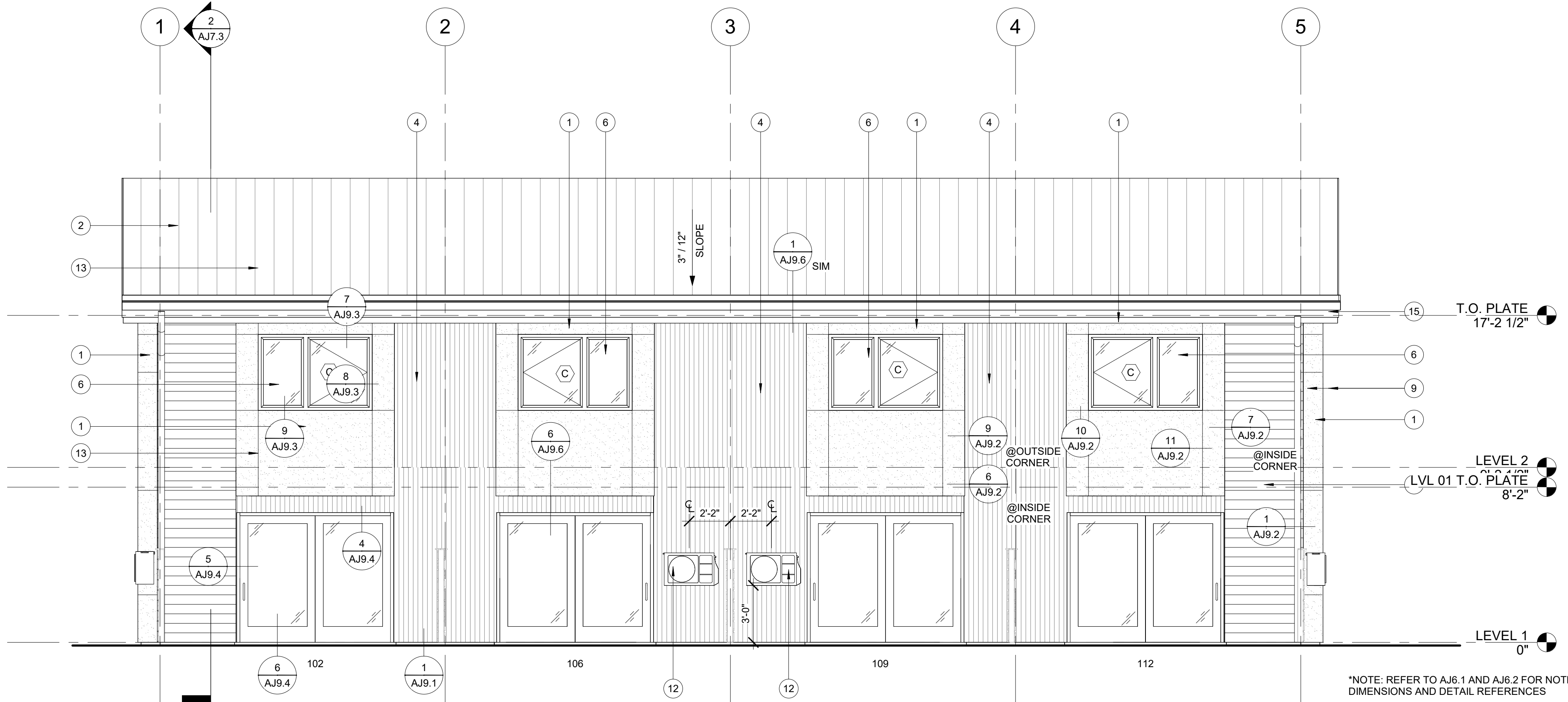
AJ6.3



EXTERIOR ELEVATION - SOUTH - LOT 25

SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

1



EXTERIOR ELEVATION - WEST - LOT 25

SCALE: 1/4" = 1'-0" (24 X 36)
SCALE: 1/8" = 1'-0" (11 X 17)

2

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ASHLAND OR. 97520

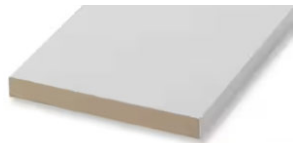
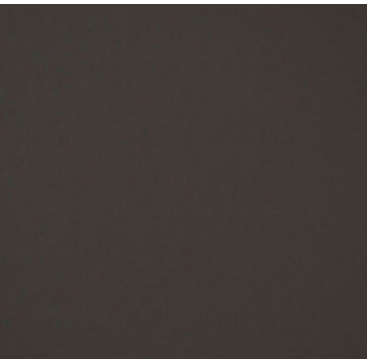
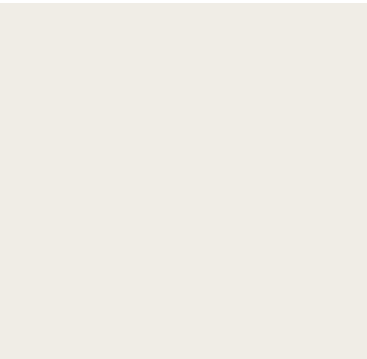
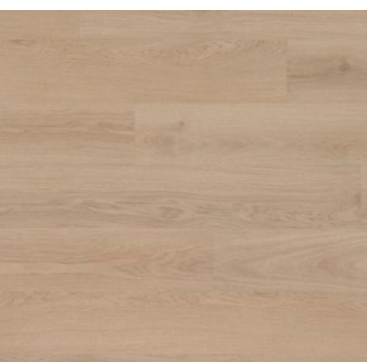
REVISIONS

EXTERIOR
ELEVATIONS -
LOT 25

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

AJ6.4

ROOM FINISH SCHEDULE																	
ROOM NUMBER	ROOM NAME	FLOOR		BASE		NORTH WALL		EAST WALL		SOUTH WALL		WEST WALL		CEILING		NOTES	
		MATERIAL	FINISH	MATERIAL	FINISH	MATERIAL	FINISH	MATERIAL	FINISH	MATERIAL	FINISH	MATERIAL	FINISH	MATERIAL	FINISH		
101	LIVING	RF-1	-	B-1	PT-1	GWB	PT-1	GWB	PT-1	-	-	GWB	PT-1	GWB	PT-1		
102	KITCHEN	RF-1	-	B-1	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1 / T-4	GWB	PT-1	GWB	PT-1		
103	PWDR	RF-1	-	B-1	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1 / SURF-3	GWB	PT-1	GWB	PT-1		
201	HALL	RF-1	-	B-1	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1		
202	BEDROOM	CPT-1	-	B-1	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1		
203	BATH	RF-1	-	B-1	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1 / SURF-3	GWB	PT-1	GWB	PT-1		
204	PRIMARY BEDROOM	CPT-1	-	B-1	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1	GWB	PT-1		

FINISH LEGEND									
Code	Image	Description	Manufacturer	Item	Finish	Dimensions	Installation	Additional Instructions	
B-1		WALL BASE	CONTRACTOR TO PROVIDE	PAINT GRADE WOOD	PT-1 / SEMI-GLOSS	4"H			
CPT-1		BROADLOOM CARPET	MOHAWK	BUILDER + MUTILFAMILY AMPED	SILVER DOLLAR	12 FT OR 15 FT WIDTH			
HWD-2		WIRE PULL	EMTEK	TRADITIONAL COLLECTION	SATIN NICKEL	4"W			
PLAM-1		PLASTIC LAMINATE	WILSONART	BEIGEWOOD 7850-60	MATTE	SEE DRAWINGS			
PLAM-2		PLASTIC LAMINATE	FENIX	GRIGIO ARAGONA J0793	STANDARD / STANDARD CORE	SEE DRAWINGS			
PLAM-2 ALT		PLASTIC LAMINATE (ALTERNATE)	ARBORITE	MOCHA V7006 VR	SATIN	SEE DRAWINGS			
PT-1		GENERAL WALL PAINT	SHERWIN WILLIAMS	ALABASTER	EGGSHELL	-			
RF-1		RESILIENT FLOORING	EVOKE	COFFEHOUSE 4.5	CAFE LATTE	4.5MM THICKNESS, 7"X48" PLANKS			
SURF-3		QUARTZ COUNTERTOP	PENTAL	SANTENAY BQ277H	HONED	1-1/4" THICKNESS, 1/2" THICKNESS @ BACKSPLASH			
SURF-4		QUARTZ COUNTERTOP	WILSONART	HAIDA Q4008	POLISHED	1-1/4" THICKNESS, 1/2" THICKNESS @ BACKSPLASH			
T-4		BACKSPLASH TILE	DALTILE	COLOR WHEEL CLASSIC	WHITE, GLOSSY	3"X6"	HORIZONTAL STACK BOND	GROUT: LATICRETE,FROSTY	
WD-1		WOOD STAIR TREAD	STAIRTEK	BRADFIELD WHITE OAK	CLEAR MATTE	36" W X 11" D / 36"W X 36"D AT LANDING			



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FINISH
SCHEDULE

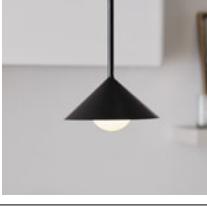
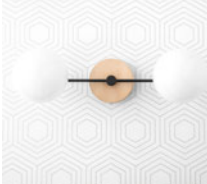
PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
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AJ11.1

PLUMBING FIXTURE LEGEND								
Code	Image	Description	Manufacturer	Item	Finish	Dimensions	Installation	Additional Instructions
PF-4		BATH SINK	KOHLER	K-2882 VERTICYL BATHROOM SINK	WHITE	SEE SPEC	UNDERMOUNT	
PF-5		TOILET	AMERICAN STANDARD	2989.101 CONCEALED TRAPWAY CADET 3 FLOWISE RIGHT HEIGHT ELONGATED TOILET	WHITE	SEE SPEC	FLOOR MOUNTED	
PF-8		SHOWER KIT	DELTA	144749 NICOLAI MONITOR 14 SERIES H2O KINETIC SHOWER HEAD AND TRIM WITH TUB FILLER	BLACK	SEE SPEC	WALL MOUNTED	
PF-10		KITCHEN FAUCET	DELTA	9159-BL-DST TRINSIC SINGLE HANDLE PULL-DOWN FAUCET	BLACK	SEE SPEC	DECK MOUNTED	
PF-11		KITCHEN SINK	DELTA	LENTA SINGLE BOWL UNDERMOUNT SINK 953034-32S-SS	STAINLESS STEEL	32"W	UNDERMOUNT	
PF-12		BATH FAUCET	DELTA	35739LF-BLPD NICOLAI TWO HANDLE WIDESPREAD FAUCET	BLACK	SEE SPEC	DECK MOUNTED	
PF-13		TUB / SHOWER SURROUND	MAAX	VIA BATHTUB SHOWER COMBINATION KIT	WHITE	30" X 60"	FLOOR MOUNTED	

APPLIANCE FIXTURE LEGEND								
Code	Image	Description	Manufacturer	Item	Finish	Dimensions	Installation	Additional Instructions
APP-7		REFRIGERATOR	SAMSUNG	FRENCH DOOR REFRIGERATOR RF18A5T01SR/AA	STAINLESS STEEL	33"W X 70" TALL, COUNTER DEPTH		
APP-8		RANGE	GE	4 BURNER ELECTRIC SLIDE IN RANGE GRF40HSVSS	STAINLESS STEEL	30"W		
APP-9		DISHWASHER	SAMSUNG	TOP CONTROL DISHWASHER DW80B7070US	STAINLESS STEEL	24"W		
APP-10		MICROWAVE VENT HOOD	FRIGIDAIRE	OVER THE RANGE MICROWAVE FMOS1746BS	STAINLESS STEEL	29.75"W		
APP-11		WASHER	SAMSUNG	WF45T6000AW FRONT LOADING WASHING MACHINE 4.5cu FT	WHITE	27"W	STACKING	
APP-12		DRYER	SAMSUNG	DVE45T6000W FRONT LOADING DRYER	WHITE	27"W	STACKING	

ACCESSORY LEGEND								
Code	Image	Description	Manufacturer	Item	Finish	Dimensions	Installation	Additional Instructions
ACC-2		TOWEL BAR	DELTA	TRINSIC TOWEL BAR	BLACK	24"W	WALL MOUNTED	
ACC-3		HAND TOWEL BAR	DELTA	TOWEL BAR	BLACK	12"W	WALL MOUNTED	
ACC-4		TOILET TISSUE HOLDER	DELTA	TRINSIC TOILET TISSUE HOLDER	BLACK	SEE SPEC		
ACC-5		SHOWER CURTAIN ROD	MOEN	STRAIGHT CURTAIN ROD	BLACK	60"W		
ACC-6		FRAMELESS MIRROR	CONTRACTOR TO PROVIDE	STANDARD MIRROR	CLEAR	SEE DRAWINGS	WALL MOUNTED	

LIGHTING LEGEND								
Code	Image	Description	Manufacturer	Item	Finish	Dimensions	Installation	Additional Instructions
L-1		RECESSED SURFACE MOUNT	HALO	SMD SLIM FIXTURE	WHITE	4"	CEILING MOUNTED	
L-5		OUTDOOR ENTRY LIGHT	LUXRITE	CANLESS INTEGRATED LED LIGHT	BLACK	4"	CEILING MOUNTED	
L-6		DECORATIVE PENDANT	WEST ELM	WARREN PENDANT	BLACK	8"	CEILING MOUNTED	
L-7		VANITY SCONCE	PEARED CREATION	MODEL NO. 9474	BLACK / WOOD	21" X 5.5"	WALL MOUNTED	



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REVISIONS

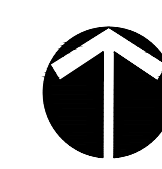
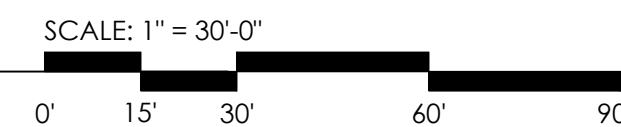
INTERIOR
LEGENDS

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

AJ11.2



1 OVERALL SITE PLAN
Scale: 1" = 30'-0" (34x22 SHEET SIZE)



CALDERA OAKS SUBDIVISION

300 CLAY STREET
ASHLAND, OR 97520



REVISIONS		
#	DATE	DESCRIPTION

PERMIT SET

OVERALL SITE PLAN

L1.0
PROJECT NO. 2516
07.03.2025
TEAM: SB, EG

MATCHLINE - SEE SHEET L4.1

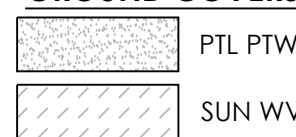
ENGINE STREET

MATCHLINE - SEE SHEET L4.1

PRIVATE STREET

PROPERTY LINE

GROUND COVERS



PT LAWN SEED PT 770 WATER LESS
ECO-LAWN
SUNMARK SEEDS NATIVE WATER
QUALITY MIX NATIVE WATER QUA

WATER LESS ECO-LAWN
NATIVE WATER QUALITY
MIX

PLANT SCHEDULE

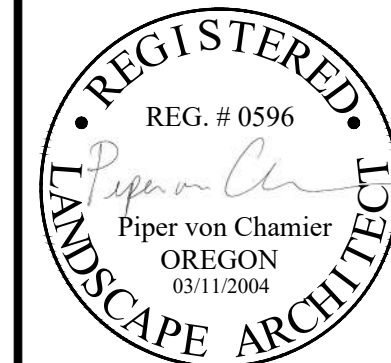
SYMBOL	CODE	BOTANICAL NAME	COMMON NAME
TREES			
	ACE GRI	ACER GRISEUM	PAPERBARK MAPLE
	BET DUR	BETULA NIGRA 'BNMT'	DURA HEAT® RIVER BIRCH
	CER JAP	CERCIDIPHYLLUM JAPONICUM	KATSURA TREE
	FRA JUN	FRAXINUS AMERICANA 'JUNGINGER'	AUTUMN PURPLE® WHITE ASH
	FRA OXY	FRAXINUS OXYCARPA 'RAYWOOD'	RAYWOOD ASH
	GLE INE	GLEDTISIA TRIACANTHOS INERMIS 'SKYCOLE'	SKYLINE® HONEY LOCUST
	MAG KOB	MAGNOLIA KOBUS	KOBUS MAGNOLIA
	PRU VES	PRUNUS CERASIFERA 'KRAUTER VESUVIUS'	KRAUTER VESUVIUS PURPLE-LEAF PLUM
	QUE KEL	QUERCUS KELLOGGII	CALIFORNIA BLACK OAK
	QUE RUB	QUERCUS RUBRA	NORTHERN RED OAK
	ZEL GRE	ZELKOVA SERRATA 'GREEN VASE'	GREEN VASE JAPANESE ZELKOVA
SHRUBS			
	ARC MAS	ARCTOSTAPHYLOS UVA-URSI 'MASSACHUSETTS'	MASSACHUSETTS KINNICKINICK
	BAC PIG	BACCHARIS PILULARIS 'PIGEON POINT'	PIGEON POINT COYOTE BRUSH
	BOU BLO	BOUTELOUA GRACILIS 'BLONDE AMBITION'	BLONDE AMBITION BLUE GRAMA
	CAL KAR	CALAMAGROSTIS X ACUTIFLORA 'KARL FOERSTER'	KARL FOERSTER FEATHER REED GRASS
	CHO XAZ	CHOISYA X DEWITTEANA 'AZTEC PEARL'	AZTEC PEARL MEXICAN ORANGE
	CIS WHI	CISTUS X BLANCHE	WHITE ROCKROSE
	CIS PUL	CISTUS X PULVERULENTUS 'SUNSET'	SUNSET ROCKROSE
	COR ISA	CORNUS SERICEA 'ISANTI'	ISANTI RED TWIG DOGWOOD
	COR KLS	CORNUS SERICEA 'KELSEY'	KELSEY'S DWARF RED TWIG DOGWOOD
	DIS ACL	DISTYLIUM X 'PIIDIST-II'	BLUE CASCADE® DISTYLIUM
	ERI KRA	ERICA X DARLEYENSIS 'KRAMER'S ROTE'	KRAMER'S RED DARLEY HEATH
	ERI WHI	ERICA X DARLEYENSIS 'WHITE PERFECTION'	WHITE PERFECTION DARLEY HEATH
	HEL SEM	HELICTOTRICHON SEMPERVIRENS	BLUE OAT GRASS
	LIR BIG	LIRIOPE MUSCARI 'BIG BLUE'	BIG BLUE LILYTURF
	LOR LDO	LOROPETALUM CHINENSE RUBRUM 'KURENAI'	JAZZ HANDS® PINK FRINGE FLOWER
	MAH AQU	MAHONIA AQUIFOLIUM	OREGON GRAPE
	MUH RIG	MUHLENBERGIA RIGENS	DEER GRASS
	NEP RAC	NEPETA RACEMOSA 'WALKER'S LOW'	WALKER'S LOW CATMINT
	PEN HAM	PENNISETUM ALOPECUROIDES 'HA MELN'	HAMELN FOUNTAIN GRASS
	PEN KRS	PENNISETUM ORIENTALE 'KARLEY ROSE'	KARLEY ROSE FOUNTAIN GRASS
	PER LIT	PEROVSKIA ATRIPLICIFOLIA 'LITTLE SPIRE'	LITTLE SPIRE RUSSIAN SAGE
	RHA EVE	RHAMNUS CALIFORNICA 'EVE CASE'	EVE CASE COFFEEBERRY
	RHA BAL	RHAPHIOLEPIS INDICA 'BALLERINA'	BALLERINA INDIAN HAWTHORN
	SAL PUR	SALIX PURPUREA 'NANA'	DWARF PURPLE OSIER WILLOW
	SAR RUS	SARCOCOCCA RUSCIFOLIA	FRAGRANT SWEETBOX
	SED AUF	SEDUM X 'AUTUMN FIRE'	AUTUMN FIRE SEDUM
	SPI DOU	SPIRAEA DOUGLASII	WESTERN SPIREA
	SYM ALB	SYMPHORICARPOS ALBUS	COMMON WHITE SNOWBERRY
	TEU COM	TEUCRIUM FRUTICANS 'COMPACTUM'	COMPACT BUSH GERMANDER

SCALE: 1" = 20'-0"



CALDERA OAKS SUBDIVISION

300 CLAY STREET
ASHLAND, OR 97520



REVISIONS

#	DATE	DESCRIPTION
-		
-		
-		
-		

PERMIT SET

LANDSCAPE
PLANTING PLAN

L4.2

PROJECT NO. 2516
07.03.2025
TEAM: SB, EG

TREES



ACER GRISEUM
PAPERBARK MAPLE



BETULA NIGRA 'DURAHEAT'
DURAHEAT RIVER BIRCH



CERCIDIPHYLLUM JAPONICUM
KATSURA TREE



FRAXINUS AMERICANA 'AUTUMN PURPLE'
AUTUMN PURPLE ASH



FRAXINUS OXYCARPA 'RAYWOOD'
RAYWOOD ASH



GINKGO BILOBA 'THE PRESIDENT'
PRESIDENTIAL GOLD MAIDENHAIR TREE



MAGNOLIA KOBUS
KOBUS MAGNOLIA



PRUNUS CERASIFERA 'KRAUTER VESUVIUS'
KRAUTER VESUVIUS PURPLE LEAF PLUM



PRUNUS CERASIFERA 'KRAUTER VESUVIUS'
KRAUTER VESUVIUS PURPLE LEAF PLUM



QUERCUS KELLOGGII
CALIFORNIA BLACK OAK



QUERCUS RUBRA
NORTHERN RED OAK



ZELKOVA SERRATA 'GREEN VASE'
GREEN VASE JAPANESE ZELKOVA

STORMWATER



CORNUS SERICEA 'ISANTI'
ISANTI RED TWIG DOGWOOD



CORNUS 'ISANTI' WINTER COLOR



CORNUS SERICEA 'KELSEY'
DWARF RED TWIG DOGWOOD



SALIX PURPUREA 'NANA'
DWARF PURPLE OSIER WILLOW



SPIRAEA DOUGLASII
WESTERN SPIREA



SYMPHORICARPOS ALBUS
COMMON WHITE SNOWBERRY



SUNMARK SEEDS NATIVE WATER
QUALITY MIX, OR APPROVED
EQUAL

SHRUBS, PERENNIALS AND GRASSES



ARCTOSTAPHYLOS UVA-URSI 'MASSACHUSETTS'
MASSACHUSETTS KINNICKINNIK



BACCHARIS PILULARIS 'PIGEON POINT'
PIGEON POINT COYOTE BRUSH



BOUTELOUA GRACILIS 'BLONDE AMBITION'
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SUNSET ROCKROSE



DISTYLIUM 'BLUE CASCADE'
BLUE CASCADE DISTYLIUM



ERICA X DARLYENSIS 'KRAMER'S ROTE'
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HELICTOTRICHON SEMPERVIRENS
BLUE OAT GRASS



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MAHONIA AQUIFOLIUM
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PENNISETUM ALOPECUROIDES 'HA MELN'
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SARCOCOCCA RUSCIFOLIA
FRAGRANT SWEETBOX



SEDUM X 'AUTUMN FIRE'
AUTUMN FIRE STONECROP



TEUCRIUM FRUTICANS 'COMPACTA'
COMPACT BUSH GERMANDER



PROTIME SEED PT 769 R&R ECO-TURF MIX WITH MICROCLOVER,
OR APPROVED EQUAL

ECO TURF

Ashland Affordable Housing Trust Fund
Application Date: February 19, 2026

Applicant:

Sunstone Housing Collaborative (SHC) on behalf of the Ashland Attainable Housing Project (AAHP)

1. Introduction

• Describe organization and what is unique about the firm, its goals, and objectives.

Sunstone Housing Collaborative bridges the gap between a mission-driven land owner's vision and the complex process of developing affordable housing. We provide focused project management, align the right partners, and ensure the landowners goals stay at the center, from early planning through implementation, so that the project delivers lasting community benefit.

Sunstone's founders were participants in an Ashland School District committee charged with finding strategies to implement toward the goal of increasing enrollment. The committee determined that rising housing costs are a significant barrier to families remaining in or moving to Ashland, and drawing from examples of other school district housing initiatives, chose to pursue a deeper understanding of what that could look like for ASD.

Thus, Sunstone Housing Collaborative was established as a not-for-profit 501c3 for the purpose of exploring the feasibility of developing affordable housing on district-owned land. In the last two years, Sunstone has facilitated the pursuit of project grant funding, establishing partnerships, development of a master plan draft, RFP process and developer team selection as well as early stage community engagement for the Ashland Attainable Housing Project. We continue in the role of vision stewardship through predevelopment funding acquisition, providing administrative support and partnership maintenance.

Our work has thus far been entirely grant funded, a demonstration of the investment of community organizations in furthering innovative affordable housing solutions. We have board members and an executive director who are all personally driven in different ways toward helping to support equity and opportunity through housing.

2. Project Description

- **Describe the program/activity for which the respondent organization is seeking funding.**

The Ashland Attainable Housing Project is advancing a mixed-income housing development on land owned by the Ashland School District that will deliver critically needed housing to Ashland families and district employees. The project has already completed several foundational milestones, including the selection of a development team, execution of an Exclusive Negotiation Agreement with the District, and the preparation of initial concept plans.

This funding request is narrowly focused on a specific, high-impact objective: to complete all tasks required to submit a competitive ORCA Intake application to OHCS. ORCA is the gateway process for state housing resources—including LIFT, Low Income Housing Tax Credits, and other critical funding programs. Successfully navigating ORCA is the essential next step to unlocking state and federal investment for this project.

- **Describe the target population expected to benefit from the program/activity.**

Individuals and households with yearly income at or below 120% Area Median Income.

The AAHP master plan draft provides programming to primarily serve households with children, as well as ASD staff and to address accessibility needs for residents with disabilities.

- **Provide the number of individuals, or households, expected to benefit from the program/activity.**

The AAHP will provide an estimated 91 rental units, of primarily 2-3 bedrooms as well as 12-15 townhouse ownership units with 3 bedrooms each.

Given the proposed distribution of unit types, the project is estimated to serve approximately 250 people.

- **If applicable, provide the number and type of housing units to be created.**

The AAHP will provide an estimated 91 rental units, of primarily 2-3 bedrooms as well as 12-15 townhouse ownership units with 3 bedrooms each.

- **Provide a detailed timeline leading to the completion of the proposed program/activity.**

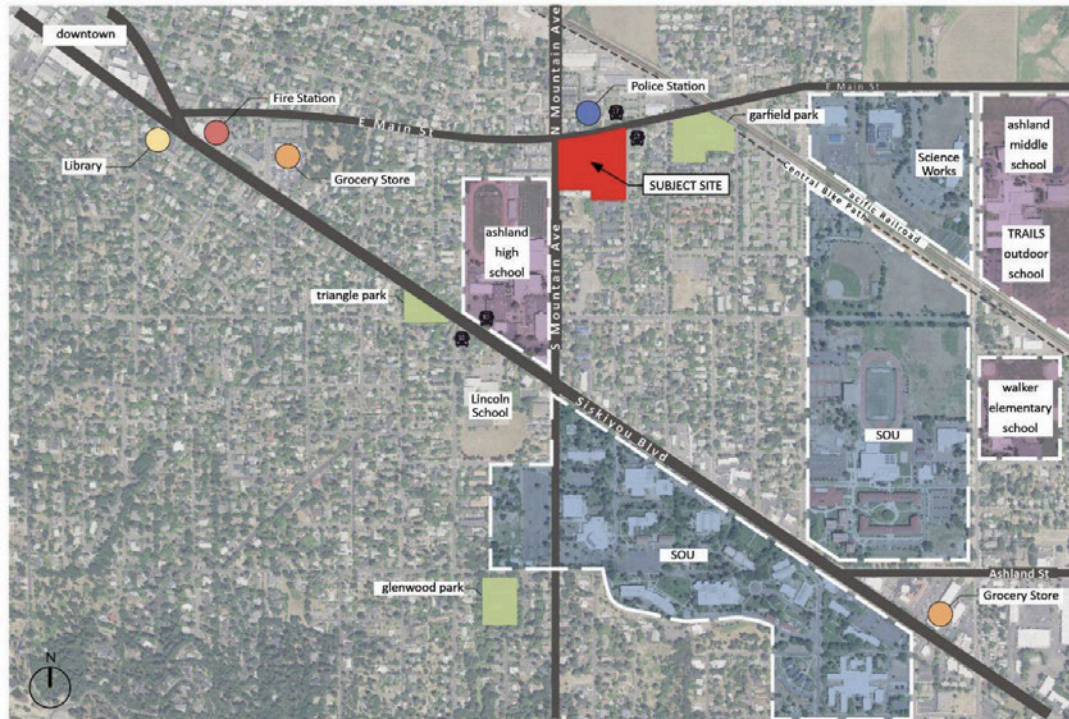
Outcome: A fully complete ORCA Intake package ready for submission to OHCS.
Estimated Completion: March 2026

Outcome: Coordinated design documentation suitable for OHCS review that accurately reflects the off-site manufacturing delivery methodology.
Estimated Completion: April/May 2026

Outcome: Formal documentation demonstrating the project's zoning compliance and approval strategy.
Estimated Completion: March 2026

Outcome: Effective project coordination ensuring timely and accurate ORCA submission.
Estimated Completion: Close of grant cycle, July 2027

- **Provide a map showing the project's location. If the project will serve a specific area, proposed project boundaries should be shown.**
SITE: 79 Lincoln Street, Ashland Oregon 97520



Above: Map showing the subject site in relation to nearby amenities and transit routes.

3. Project Experience

- **Describe the respondent's organizational framework, special resources, and any other information to demonstrate that the respondent can effectively and efficiently complete the proposed program/activity.**

Sunstone brings a combination of specialized experience and relational capital that positions it to successfully carry out the proposed activities.

Working knowledge of the Affordable Housing Development Process:

Sunstone has direct experience supporting early-stage affordable housing development, including feasibility coordination, developer solicitation, and integration of long-term affordability, accessibility, and service-rich design.

Coalition-Building Capacity:

Sunstone has demonstrated ability to convene diverse partners such as public agencies, school districts, nonprofits, service providers, and community stakeholders around shared housing goals.

Mission Stewardship:

Sunstone's role as a neutral, non-developer intermediary allows it to hold vision and public purpose without financial conflict, supporting values-aligned decision making.

Administrative and Technical Support:

Sunstone provides clear documentation, process management, and translation of technical concepts into accessible information for landowners and community partners.

Regional Relationships:

Established and growing relationships across Ashland, Jackson County and statewide enable Sunstone to move quickly, align efforts, and avoid duplicating existing initiatives.

The completion of the goals outlined in this request has additional momentum, thanks to the deep experience and collaborative efforts of the development team. This team includes developer Matt Edlen of Edlen & Co, Chris Brown of Arkitek Design and Architecture, Robb Mayers of Outlier Construction, and Jessica Therkelsen of Trusted Homes Community Land Trust.

This entire team has worked in unison to bring this project to the next level and is dedicated to seeing it to completion.

• Describe the respondent's organizational experience in completing programs or activities similar to the proposal outlined in the RFP.

Sunstone Housing Collaborative provided comprehensive technical assistance and organizational support to the Ashland School District to help advance the Ashland Attainable Housing Project from early concept toward implementation. Sunstone's role was not to develop the project, but to support the District by reducing administrative and cost burden, clarifying decision-making, and stewarding a mission-driven vision centered on long-term community benefit.

Sunstone supported early-stage planning and feasibility work, including coordination of architectural services to develop a draft master plan that articulated project goals, site considerations, and community priorities. This work helped translate complex housing concepts into clear, accessible materials that informed District leadership and stakeholders.

Sunstone also provided technical and administrative support for the developer solicitation and selection process. This included drafting and managing a Request for Proposals, coordinating consultant input, and supporting the School Board in evaluating proposals based on alignment with project goals, capacity, and long-term affordability.

In addition, Sunstone facilitated partnership development among housing professionals, service providers, and community organizations, including elevating the integration of

co-located early childhood education as a core project element. Sunstone helped ensure that accessibility, sustainability, and public purpose remained central throughout planning and decision-making.

Sunstone served as a faithful steward and coordination partner helping the Ashland School District navigate the complexity of early-stage affordable housing development while minimizing financial risk and maintaining focus on community-centered outcomes.

Additionally, Sunstone has participated in contributing to other local housing initiatives such as:

- Jackson County Long Term Recovery Group Housing Workshops
- Fair Housing Training with the Fair Housing Council of Oregon
- Panelist at Housing Oregon's Annual Conference and the Housing Land Advocates conference at PSU discussing the importance of cross-sector collaboration for housing and community development.
- Ongoing inquiry, collaboration and advocacy for accessible housing design and development.

• **List other organizations involved with this project and their level of involvement.**

Edlen & Co.

Role:

Edlen & Co. will lead preparation of the ORCA Intake package, coordinating financial modeling, capital stack development, narrative responses, and required supporting documentation for submission to Oregon Housing and Community Services (OHCS).

Qualifications:

Edlen & Co. is an experienced affordable housing developer with deep familiarity in OHCS funding processes and complex capital structuring. Their experience navigating state underwriting requirements ensures that the intake package will be complete, competitive, and aligned with OHCS expectations. Edlen will also ensure consistency across financial, design, and regulatory materials.

Outlier Construction

Role:

Outlier Construction will provide technical documentation and cost validation related to the project's off-site manufacturing methodology. This includes integration of modular or prefabricated systems into the development timeline, budget, and construction narrative required for OHCS review.

Qualifications:

Outlier brings expertise in innovative construction methods, local collaboration and cost-efficient delivery systems. Their involvement ensures that design documents accurately reflect constructability, sequencing, and pricing consistent with project delivery—critical for underwriting and feasibility review.

Arkitek Design and Architecture**Role:**

Arkitek will produce coordinated architectural documentation suitable for OHCS review, reflecting both site conditions and off-site manufacturing specifications. The firm will also prepare formal zoning compliance documentation and outline the project's land use approval strategy.

Qualifications:

Arkitek has deep experience in community serving design, local zoning processes, and integration of modular construction into architectural documentation. Their knowledge of municipal approval pathways ensures that the project's zoning compliance strategy is clearly articulated and defensible.

Trusted Homes Community Land Trust**Role:**

Trusted Homes CLT will support documentation related to long-term affordability structure, ownership model, and stewardship framework, as required for OHCS review. They will help articulate compliance mechanisms that ensure permanent affordability and mission alignment.

Qualifications:

As a community land trust, Trusted Homes brings expertise in long-term affordability models, resale restrictions, stewardship policies, and compliance monitoring. Their involvement strengthens the ORCA submission by demonstrating durable affordability and community-based ownership structure.

4. Funding Request**• Provide the requested amount of Ashland Housing Trust Funds.**

\$50,000

• Provide the amount of any Community Development Block Grants requested under a separate application (if applicable).

N/A

- Provide a detailed project budget that includes all other funding sources anticipated to support the program/activity.

AAHP Rental HOUSING

Source	Amount	Use	Amount
LIHTC Equity + Credits	\$16,834,759	Construction Contract	\$24,765,108
LIFT Funds	\$16,660,000	Soft Costs	\$7,463,526
Deferred Developer Fee	\$1,934,629	Financing Costs	\$3,271,822
Permanent Loan	\$1,967,123	Contingency	\$1,410,026
		Land + Ground Lease	\$172,056
Total Sources	\$37,396,510	Other Hard Costs	\$400,000
		Total Uses	\$37,482,538

AAHP CLT HOUSING

Source	Amount	Uses	Amount
LIFT Subsidy	\$2,460,000	Hard Costs	\$3,041,045
Home Sale Proceeds	\$2,517,600	Soft Costs	\$1,144,720
Construction Loan	\$2,564,020	Contingency + Fees	\$607,562
Loan Paydown	-\$2,564,020	Financing	\$184,056
Fundraising / VE	-\$217	Land	\$0
Total Sources	\$4,977,383	Total Uses	\$4,977,383

- **Provide the proposed percentage of matching funds, including the estimated value of donated land or labor, demonstrating that the Affordable Housing Trust Fund contribution shall not exceed more than 50% of the total project, or program, cost.**

As seen in the above chart, the grant funds requested in this proposal amount to approximately 0.12% of the total project cost.

- **Provide a detailed budget including but not limited to land acquisition costs, materials, building permit costs, predevelopment costs, professional services, and any other administrative costs.**

Please see attached

Ashland Attainable Housing Project + SHC

ASHLAND HOUSING TRUST FUND | BUDGET

Category	Amount
ORCA Submission Core	\$22,000
Architectural & Off-Site Manufacturing Coordination	\$17,500
Land Use / Zoning	\$5,000
Sunstone Admin & Facilitation	\$5,500
TOTAL	\$50,000

1. ORCA Submission Core – \$22,000

This category covers all direct costs required to prepare and submit a complete ORCA Intake application, including technical documentation and financial modeling.

Line Item	Description	Amount
ORCA Application Fee	Required OHCS Impact Assessment/Intake submission fee	\$2,500
Development Consulting – ORCA Forms	Preparation of all Intake forms, narratives, unit mix tables, schedule, and required exhibits	\$10,000
Financial Modeling	Creation of initial OHCS-compatible proformas reflecting CLT and off-site manufacturing delivery structure	\$6,000
Permitting Strategy Memo	Written summary of permitting approach, timelines, and approval path	\$3,500
Subtotal		\$22,000

Outcome: A fully complete ORCA Intake package ready for submission to OHCS.

2. Architectural & Off-Site Manufacturing Coordination – \$17,500

Although concept plans are largely complete, additional coordination is required to align local architectural work with the off-site manufacturing building system and produce materials required for ORCA.

Line Item	Description	Amount
Intake-Level Architectural Updates	Refinement of site plan, unit mix diagrams, code summary, and exhibits for ORCA	\$10,000
Off-Site Manufacturing Coordination	Coordination meetings and technical alignment between local architect and off-site manufacturing design team	\$7,500
Subtotal		\$17,500

Outcome: Coordinated design documentation suitable for OHCS review that accurately reflects the off-site manufacturing delivery methodology.

3. Land Use & Zoning – \$5,000

Line Item	Description	Amount
Land Use Consultant Support	Zoning compliance confirmation, parking strategy, density analysis, and code path memo	\$5,000
Subtotal		\$5,000

Outcome: Formal documentation demonstrating the project's zoning compliance and approval strategy.

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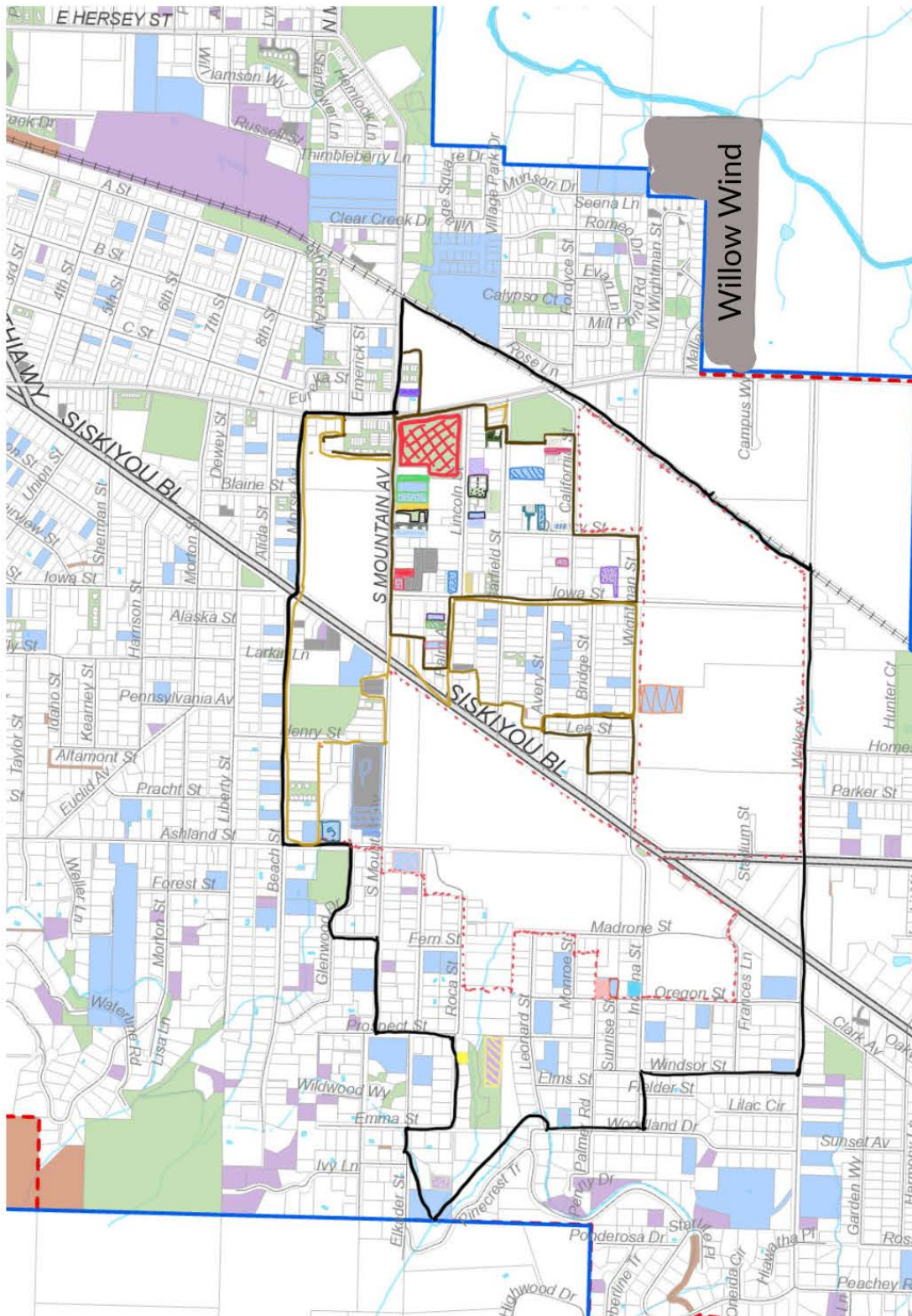
4. Sunstone Administrative & Facilitation – \$5,500

Line Item	Description	Amount
Sunstone Administration	Grant management, coordination meetings, document control, stakeholder facilitation	\$5,500
Subtotal		\$5,500
<i>Outcome: Effective project coordination ensuring timely and accurate ORCA submission.</i>		

Ashland Oregon

Buildable Lands Inventory (BLI) + Qualified Census Tract (QCT)

In Oregon, Qualified Census Tracts (QCTs) are prioritized for affordable housing development through the Low-Income Housing Tax Credit (LIHTC) program.



Outlined in black is the Ashland QCT, which includes the proposed site for the ASD initiated Ashland Attainable Housing Project.

Outlined and hatched in red is the proposed site of the Ashland Attainable Housing Project

Within the QCT there is a smaller area outlined in dark brown that is zoned R-3 which allows for multifamily dwelling development

The entire QCT resides within city limits and within the Urban Growth Boundary (UGB).

References:

HUD Qualified Census Tract

<https://www.huduser.gov/portal/datasets/qct.html>

OHCS Qualified Allocation Plan

<https://www.oregon.gov/ohcs/rental-housing/housing-development/development-resources/pages/qualified-allocation-plan.aspx#:~:text=Some%20projects%20have%20always%20been,incomes%20below%2060%25%20of%20the>

City of Ashland Zoning Map

<https://maps.ashlandoregon.gov/documents/ashlandgis::official-zoning-map/explore?path=>

Jackson County Interactive Mapping

<https://jcgis.maps.arcgis.com/apps/MapSeries/index.html?appid=fa99a30541d94b86aef4a39bc68d0580>

Ashland, Oregon Buildable Lands Inventory

https://gis.ashland.or.us/hub/pdf/planning_Development/2019_Buildable_Lands_Inventory_Map_36x24.pdf

<https://ashland.news/ashland-buildable-lands-inventory-approved-by-council/>





PROPOSAL: Roots & Rooftops: Securing Permanent Affordability at the Beach Creek Development

To: City of Ashland

From: Trusted Homes

Re: Ashland Housing Trust Fund 2026 Application

Date Submitted: February 18, 2026

Total Funding Request: \$100,000

I. Introduction

A. About

Trusted Homes is a new Oregon non-profit that provides permanently affordable homeownership opportunities for those who contribute to the fabric of the Southern Oregon economy and community. Trusted Homes envisions sustainable, equitable communities where everyone can afford to live where they work and play. Trusted Homes was founded in 2024, in part, at the urging of the City of Ashland and in response to the City's Housing Production Strategy, which specifically names the need for a local Community Land Trust (CLT).

Trusted Homes' financial supporters include the City of Ashland, the Carpenter Foundation, Ford Family Foundation, Jackson Care Connect and Rogue Valley Council of Governments. Beyond institutional support, we are fueled by a growing network of individual community members who recognize that providing affordable homes is essential for the people who live and work in the Rogue Valley. This diverse funding base demonstrates a shared commitment to stabilizing our local workforce and ensuring Ashland remains a vibrant, inclusive community.

Members of the Board of Directors include a CLT resident, the co-founder of Options for Housing, Resources & Assistance (OHRA) and the former Executive Director of Southern Oregon Land Conservancy. Informal and formal advisers include several local residential developers and affordable homeownership experts and community leaders. Our primary technical consultant is the former Executive Director of Rooted Homes, a CLT based in Bend, Oregon, that is now on the kind of steep growth trajectory Trusted Homes is following.

B. Focus

Trusted Homes' mission is to expand opportunities for homeownership in Southern Oregon by building and managing permanently affordable homes through the Community Land Trust model (see below). Trusted Homes brings the following essential components to this partnership:

- **Resident-driven design** – engage local homebuyers to provide data that will support site and home design, as well as consult on achievable price points of homes
- **Apply for and steward awarded subsidy** – Trusted Homes will serve as the lead applicant (or co-applicant) to OHCS for LIFT and any other applicable homeownership subsidies and manage all compliance
- **Ensure appropriate homebuyers are ready for purchase** – Trusted Homes will manage all homebuyer selection, personal service agreements, and home closings
- **Long-term homeowner stewardship** – Trusted Homes will manage the resale of the homes, with associated resale restrictions, as well as maintaining the Home Owner Association covenants and all compliance

C. The Community Land Trust Model

Trusted Homes operates as one of over 300 CLTs across the United States, utilizing a proven framework to bridge the gap between rising real estate costs and stagnant wages. Under the Community Land Trust (CLT) model, residents own their homes outright and may secure traditional mortgages, while the non-profit CLT retains ownership of the underlying land. This land is leased back to the homeowner through a renewable, 99-year ground lease.

To ensure permanent affordability, the CLT utilizes initial public and private subsidies to significantly lower the purchase price for the original buyer. This value is preserved for future generations through two primary mechanisms: the CLT's continued land ownership and a legal covenant that caps the home's appreciation. These structured terms require the home to be resold to subsequent income-qualified buyers, allowing the original homeowner to realize a fair return on their investment while ensuring the property remains accessible to the community. **Ultimately, this bridges the gap between rising market costs and local wages, ensuring that housing remains a community asset rather than a speculative commodity.**

II. Project Description

A. Project Overview

Trusted Homes has been awarded six lots of land from the City of Ashland for the purposes of constructing 6 permanently affordable homes in Ashland in 2026. This build at Beach Creek will produce 4 cottages (2 bed, 1.5 bath), one detached 3 bedroom home, and one detached 4 bedroom home. **The homes will be built for sustainability meeting Earth Advantage Platinum standards, including installed solar panels and EV chargers.**

The organization is also part of the team developing at least 12 more CLT homes as part of a larger project with the Ashland School District. Trusted Homes has been selected to build at least 10 CLT homes at the Talent Gateway site. In addition, Trusted Homes has been in discussion with other developers about using the CLT model in subsequent Ashland projects.

This application focuses on the Beach Creek build, though other projects are an important context to the funding need - **our organization is building with the end goal of stewarding these properties for 99 years or more**. The single most important thing we can do to stabilize CLT homeownership in Ashland today is to build the infrastructure of this rapidly growing organization.

Trusted Homes' goals for the funding period are threefold:

1. Ensure adequate funding to **complete the Beach Creek affordable housing build** while maintaining momentum on our subsequent project pipeline;
2. Conduct outreach and education to **ensure qualified home buyers are ready** to step into CLT homeownership; and
3. **Build the key infrastructure needed** to ensure Trusted Homes will uphold its promise to steward affordability for at least 99 years.

The target population for homes built at Beach Creek is individuals and families at or below 80% of Area Median Income (AMI) with particular attention paid to those who have had difficulty accessing homeownership. **Trusted Homes will strive to reach prices at 65% of AMI**. In Ashland, these restricted prices can be nearly half the market rate for the same home. This is an extremely valuable opportunity for families around Jackson County, and we want anyone who is qualified to be informed of the opportunities.

OUTREACH AND EDUCATION

One of the first steps in this process is to reach out to potential home buyers to provide information and education services and ensure that families across the valley have the chance to purchase one of these beautiful, permanently affordable homes in the heart of Ashland. We want to ensure that a broad group of applicants, particularly those historically excluded from homeownership, are ready to purchase by the time we begin building (around August 2026). Some potential home buyers may need referrals to credit counseling, or additional support from financial institutions to become mortgage ready. A portion of the budget is designated for community workshops and buyer-readiness training.

These efforts will also prepare home buyers for the additional 12 or more homes we are partnering to build in Ashland in 2027. By putting in this extra effort, we can ensure a comprehensive group of families has access to homeownership in our community at a rate they can afford.

LONG TERM STEWARDSHIP

The Beach Creek Project represents a pivotal 'Capacity Building' milestone for Trusted Homes. By securing Ashland Housing Trust Fund support, our organization will be able to formalize the legal and

operational policies and practices required to scale the Community Land Trust model across Ashland. This investment doesn't just fund six roofs; it funds the technical expertise, stewardship software, and legal frameworks that will allow us to partner with the City on future tracts of land, effectively functioning as a long-term, low-cost extension of Ashland's affordable housing strategy.

B. Project Location

This project is located within the larger Beach Creek subdevelopment on Mountain Avenue in Ashland. Specifically, Trusted Homes will develop lots 43-48.



C. Project Timeline

Dates	Phase	Actions	Benchmarks
July 2025 - May 2026	Pre-development	City of Ashland maintains ownership of the property	
		Developer partners secure financing	By May 2026
		Developer partners secure Oregon State funding through the Local Innovation Fast Track (LIFT) Program	Application in Feb/Mar Award in April/May
		Trusted Homes builds homeowner outreach program in conjunction with local housing and culturally responsive organizations	2 homeowner prep sessions by May 2026
January 2026 - October 2026	CLT policy & practice development	Trusted Homes builds out significant policy infrastructure, including our Master Ground Lease, home buyer preferences and processes, restricted resale formulas, and dozens more as outlined in nationally recognized CLT stewardship guides	Master lease, resale formulas, and other policies are drafted and adopted with appropriate legal review
May 2026	Ownership Transfer	City of Ashland transfers ownership to developers after confirmation of receipt of LIFT funds	Transfer in May 2026
June 2026- April 2027	Construction & Homeowner Identification	Developers close the LIFT loan	July 2026
		Onsite construction begins in accordance with LIFT timeline requirements	August 2026
		Construction is phased over 10 months	Completed by April 2027
		Homeowner education and outreach programs begin alongside construction	3 more CLT education sessions before April 2027
		Mortgage readiness support programs begin in conjunction with local financial institutions	At least 3 sessions of financial workshops before April 2027
		Additional public marketing outreach, including meeting with local realtors & distributing information via local news & local partners	At least one realtor session; local meetings; news coverage
August 2026 - June 2027	Sale of Homes & Transfer to CLT Model	Pre-approved home buyers at 80% of AMI or below are selected with specific attention to individual risk factors, in accordance with fair housing laws	All 6 homes are occupied by end of summer 2027
		At point of sale to home buyer, the deed to the land issues to Trusted Homes and the deed to the home issues to the home buyer	Spring 2027
		99-year land lease with named resale restrictions is entered into at point of sale.	Spring 2027
June 2027 and beyond	Stewardship by Trusted Homes	Trusted Homes maintains relationship with home owner, ensuring ongoing property maintenance, supporting HOA, and working with homeowners to reduce risk of foreclosure	Ongoing community support activities

III. Project Experience

A. Trusted Homes' Background and Key Personnel

Trusted Homes is a young nonprofit, but we are supported by the experience of expert developers, builders, planners, lawyers, and CLT professionals. Our primary consultant is the former Executive Director of Rooted Homes, a CLT in Bend with significant development experience. Our builder for this project is Taylored Elements, a company that has been building locally since 2004. One of our attorneys is solely focused on CLTs and supports organizations around the Pacific Northwest. In addition, we are active members of Grounded Solutions (the national network of CLTs) and the North West Coalition of Community Land Trusts. Our board has received training related to Fair Housing laws and operating CLTs, and our board, advisors, and project committee members have spent significant time learning about, drafting and adopting key policies related to running successful CLTs.

Jessica Therkelsen (Executive Director) is a lawyer with over 15 years of experience leading nonprofit organizations. She has worked with teams of advocates all over the world to design and implement programs that benefit displaced persons. Jessica is committed to building a CLT with the lasting power to steward these homes in perpetuity.

Jackie Keogh (primary technical consultant) is a leading expert in CLTs and the former Executive Director of Rooted Homes, a CLT based in Bend, Oregon.

KEY PERSONNEL AND BOARD MEMBERSHIP

Personnel	Board of Directors	Board Committee Members	Advisors (non voting)
Jessica Therkelsen, Executive Director	Barry Braden- Board Chair (Chair of First United Methodist Church of Ashland Admin Council)	Alex Campbell- Projects Committee Member (Talent City Manager)	Tonya Graham, Mayor of Ashland
Jackie Keogh, Expert Consultant	Jacob Cook - Board treasurer (Project Coordinator, Jackson County)	Molly Mullane- Projects Committee Member (local real estate agent)	Mark Knox, Local Developer
	Linda Adams, Board Secretary		Rich Rohde, Local Housing Expert
	Leigh Madsen, Board Member		Brandon Goldman, City of Ashland
	Barbara Featherstone, Board Member		Linda Reid, City of Ashland
	Michael Duffy, Board Member (CLT Homeowner)		Karen Smith
	Diane Garcia- Board Member (Former ED of Southern Oregon Land Conservancy)		

B. Taylored Elements Construction Background and Key Personnel

ABOUT

Taylored Elements Construction (TEC) has been building in southern Oregon since 2004, initially focused on remodels and renovations, moving into development and new construction. Currently TEC has 15 employees and is running 25 projects simultaneously.

President, Kyle Taylor, got his real building education while working as a carpenter and laborer for a local custom-building company, then turning that into custom finish carpentry and renovations. Big picture-minded and a glass three quarters full spirit Kyle has allowed TEC to be versatile and nimble throughout many different market conditions and project types.

Affordable housing is key for our area to maintain its workforce. Although TEC has not participated in any deed restricted affordable projects, the post Almeda fire rehabilitation has proven that TEC is capable of building in quantity, with quality. Having rebuilt a 20-unit project in Phoenix as well as another 22 in Talent, TEC is well versed in cost sensitive building techniques.

RECENT & CURRENT EXPERIENCE

TEC's building portfolio boasts a diverse array of endeavors in general contracting, investment, and real estate ventures. Among the notable accomplishments located in Ashland:

- **West Village:** Nearing completion, this project encompasses the development and construction of 42 single-family homes, slated for completion by Fall 2025.
- **Jackson Self Storage:** Completed in 2023, this project involved the development and construction of a 240-unit self-storage facility, providing valuable storage solutions for the community.
- **Helman Heights:** Completed in 2020, Helman Heights resulted in the development and construction of 8 single family homes, each including a design detail featuring repurposed materials from the original 1900's home on the site.
- **Historical Preservation:** Taylored Elements has received Historic Preservation Awards for their work on several historical buildings in Ashland, including Paddington Station and Dewey Street.

Taylored Elements Construction has been a long-standing member of the Builders Association of Southern Oregon (BASO) and Kyle Taylor currently serves as the Assistant Vice President on the Board.

C. Trusted Homes' Approach to Affordable Home Stewardship

Trusted Homes is intentionally rooted in relationship-based, community-led practice. We focus on households historically excluded from homeownership; which in our area includes BIPOC communities, single-parent households, multigenerational families, immigrants, and first-time buyers priced out of the market.

Our engagement related to our first 6 constructed homes will begin long before a home is available. We will partner with reputable community organizations, schools, faith communities, and other local jurisdictions to co-host workshops, listening sessions, and homeownership orientations that center

community questions, lived experience, and financial realities. We are working with ACCESS, Jackson County Long-term Recovery Group, The Maslow Project, and plan to work with other community based organizations. These gatherings shape our program design, eligibility criteria, buyer education curriculum, and stewardship policies.

IV. Funding Request

Trusted Homes requests \$100,000 from the Ashland Housing Trust Funds program for the period of July 1, 2026 - June 30, 2027. The organization respectfully requests payment in the form of 2 disbursements over the course of the year, in order to maintain the liquidity needed to operate an ongoing construction project. For instance, 60% disbursement in the month of July, 2026, and 40% disbursement in January 2027 after the completion of a status update.

BEACH CREEK PROJECT BUDGET AND MATCHING

The total cost to build the 6 affordable homes at Beach Creek is close to \$1.73M, based on good faith estimates from our partner, Taylored Elements as of mid February, 2026. Of that budget, Trusted Homes will ask Oregon Housing and Community Services to contribute roughly \$725,000 through its LIFT program. The contribution from the state will further ensure that Trusted Homes can sell these homes closer to 65% of AMI (well below the required 80%). Most of the funding from LIFT will go directly to construction costs. It is likely that Trusted Homes will earn a matching contribution of around \$110,000 from a combination of fees applied to the LIFT funding, as well as a small percentage of sales of the 6 homes.

Trusted Homes Project Budget - Beach Creek Permanently Affordable Homes	
Prepared for Ashland Housing Trust Fund Grant 2026	
<u>Revenue</u>	
Ashland Housing Trust Fund	\$ 100,000.00
Rogue Valley Council of Governments/ SORED	\$ 23,000.00
OHCS LIFT Grant	\$ 725,000.00
Home Sales at 65% of AMI	\$ 1,125,000.00
Total Revenue	\$ 1,973,000.00
<u>Expenses</u>	
Land Acquisition*	\$ 0

Construction Total:	\$ 1,730,000.00
<i>Materials</i>	\$ 726,600
<i>Permits</i>	\$ 23,967.00
<i>Predevelopment</i>	\$ 23,000.00 (RVCOG Grant)
<i>Other (Time, Admin, Contingency)</i>	\$ 956,433
Total Administration & Fees	\$ 242,200.00
<i>Trusted Homes admin & oversight</i>	\$ 110,000.00
<i>Developer compensation</i>	\$ 60,550.00
<i>Legal Fees</i>	\$ 20,000.00
<i>Realtor Fees</i>	\$ 30,000.00
<i>Consultants</i>	\$ 13,000.00
<i>Contingency</i>	\$ 9,450.00
Total Expenses	\$ 1,973,000.00

*Land has been donated by the City of Ashland and infrastructure provided by KDA homes.

TRUSTED HOMES ORGANIZATIONAL BUDGET

Trusted Homes is offering the community a long term service: the stewardship of affordable homes for generations to come (99 years or more). In order to staff our first project, plan for our next projects in Ashland, and build the infrastructure needed to ensure long term property health, Trusted Homes must build its capacity. This grant from the Ashland Housing Trust Fund will allow Trusted Homes to begin the work in all three areas.

The construction budget is held separately from the organizational budget for this project for purposes of clear accounting. The Ashland Housing Trust Fund grant will only be applied to organizational costs for the following reasons:

1. Staff time allocated to affordable housing development in Ashland, primarily focused on the Beach Creek build.
2. Operational costs directly related to marketing, outreach, and education of potential homebuyers.
3. Operational costs directly related to professional services needed to build affordable homes in Ashland (for instance, legal and consulting fees).
4. Project costs ARE included in the organizational budget if they cannot be reimbursed through state funding (for instance the LIFT application and predevelopment loan fees).

Trusted Homes Organizational Budget by Funder								
Ashland Housing Trust Fund Grant 2026								
PROJECTED* for Fiscal Year 2026/2027								
Projected, not secured								
	Funder:	Ashland Housing Trust Fund	Carpenter Fntn	OCF	Grants, other	Beach Creek matching income	Individual Donors	TOTALS
		100,000	5,000	40,000	40,000	110,000	32,573	327,573
Expenses								
Salaries/Wages	\$ 192,780	78,500	0	36,000	38,000	21,527	18,753	
Operational Costs	\$ 43,200	12,500	5,000	4,000	2,000	5880	13,820	
Programmatic Costs								
LIFT app fees (Beach Creek)	\$8,000	8,000						
redev loan fees (Beach Creek)	\$1,000	1000						
Stewardship fund	\$35,397					\$35,397		
Property acquisition fund	\$47,196					\$47,196		
Total Expenses	\$ 327,573	100,000	5,000	40,000	40,000	110,000	32,573	327,573
* This budget is reviewed for the AHTF grant application but is subject to change as per the annual budget to be approved by the board								

Thank you for your consideration.



HOUSE OF REPRESENTATIVES

January 29, 2026

Re: *Letter of Support for Trusted Homes Community Land Trust*

To whom it may concern,

I am writing to express my strong support for the Trusted Homes Community Land Trust (CLT) and their ongoing efforts to address the critical housing shortage in Ashland and the broader Rogue Valley.

As the State Representative for this district, I am acutely aware that our region's economic vitality depends on the stability of our workforce. Currently, many of our essential workers—our teachers, healthcare professionals, and municipal staff—find themselves priced out of the very community they serve. Trusted Homes offers a proven, structural solution to this "missing middle" crisis through their commitment to permanent affordability.

I was particularly pleased to see the Ashland City Council's unanimous vote to award Trusted Homes the Beach Creek Project. This six-unit development serves as a vital proof-of-concept for Southern Oregon. The project ensures that public investments in housing stay "locked" in the land, benefiting family after family for generations rather than disappearing after a single market-rate resale.

The work Trusted Homes is doing—specifically their focus on capacity building and formalizing the legal frameworks for the CLT model—is essential. By supporting their operational growth now, we are investing in long-term infrastructure that will allow for the scalable development of affordable housing across Jackson County and beyond.

Trusted Homes is a vital partner in our regional housing strategy. I wholeheartedly support their expansion in our community.

Best,

Pam Marsh
Representative House District 05
Southern Jackson County

1. Introduction

Describe organization and what is unique about the firm, its goals, and objectives.

Sunstone Housing Collaborative bridges the gap between a mission-driven land owner's vision and the complex process of developing affordable housing. We provide focused project management, align the right partners, and ensure the landowners goals stay at the center, from early planning through implementation, so that the project delivers lasting community benefit.

Sunstone's founders were participants in an Ashland School District committee charged with finding strategies to implement toward the goal of increasing enrollment. The committee determined that rising housing costs are a significant barrier to families remaining in or moving to Ashland, and drawing from examples of other school district housing initiatives, chose to pursue a deeper understanding of what that could look like for ASD.

Thus, Sunstone Housing Collaborative was established as a not-for-profit 501c3 for the purpose of exploring the feasibility of developing affordable housing on district-owned land. Our work has thus far been entirely grant funded, a demonstration of the investment of community organizations in furthering innovative affordable housing solutions. We have board members and an executive director who are all personally driven in different ways toward helping to support equity and opportunity through housing.

We have developed relationships and partnerships with local organizations and individuals also invested in housing justice. We recognize that each project's needs are different, so communication early and often is crucial to establishing trust and understanding.

We recognize the challenges that are presented when a person is without safe, reliable shelter and the cascade of difficulties that can happen when that lack is reoccurring. Sunstone is determined to build and maintain partnerships that combine the resources necessary to create community integrated housing that serves individuals and families in comfort, stability and dignity.

2. Project Description

Describe the program/activity for the respondent organization seeking funding.

Sunstone's work began with the purpose of supporting the Ashland School District in their affordable housing initiative. We are nearing fulfillment of our contract with ASD and the outcome, the Ashland Attainable Housing Project project is now moving forward with the primary direction of the development team.

We have identified four unique ways in which our work can now be extended to support the further development of mission-driven affordable housing in Ashland:

1. Building a Congregational Housing Coalition

Sunstone has been expanding its capacity to support mission driven land owners to include congregations who may be interested in affordable housing development but who require technical guidance and coordination assistance.

Sunstone has shown to be instrumental in bringing developers to our area that are capable of building restricted income housing to serve households at 120% AMI and below. We will continue to be instrumental in bridging access to funding and development opportunities to the region by growing partnerships with larger more resourced organizations. One such organization is Leaven Community, which has demonstrated years of in-depth housing development support to congregations in the Portland-metro area as well as establishing regional collaborations that bridge geographic and relational gaps to deliver community-specific results.

This approach merges the experience and established connections of Sunstone with the proven service model developed by Leaven Community.

Expected outcomes will include:

- Coordinated community outreach to congregations curious about the potential of developing their properties.

- Establish a Congregational Housing Coalition, building upon outcomes from the Congregational Housing Workshop with Jackson County Long Term Recovery Group

- Facilitating access to technical assistance and institutional support models that best serve Coalition participants interested in pursuing the development of affordable housing.

- Ensuring mission alignment and community impact across partnerships and project outcomes

- Partner engagement and relationship management throughout the initiation of the development process as required by the landowner and chosen development team, including tracking progress, reporting and funding access.

- Sunstone will monitor and track progress of the coalition, providing reports to interested parties such as the Ashland Housing and Human Services Commission and quarterly housing production gatherings hosted by Mayor Graham.

2. Supporting incremental development through Mission-Driven Housing on Single Family lots.

Legislative Bill [HB2001](#) allowed for Single Family Lots to include up to 3 additional units. In [Ashland, code 18.5.3.140 Middle Housing Land Divisions](#) (MHL) also allows the lot to be subdivided. Additionally, [Ashland municipal code 18.2.3.040](#), allows for an ADU to be built through the city provided streamlined process. While this legislation is designed to encourage more infill housing production, many residents either don't know what is possible, or they may not understand how to go about taking advantage of these opportunities.

The City of Ashland has done their part to provide more flexible building codes, and more streamlined processes for new development. Where there may be limited capacity by city staff, Sunstone is in a strategic position to connect with Ashland homeowners through education, partnerships, and development support. This provides the opportunity for Sunstone to serve the city through shorter term incremental development while also working with larger developments that often take years to complete.

While the strategy is sound, there are process details that still need to be developed. We plan to initiate the marketing and community engagement first to help inform those details, along with with exploring the viability of establishing the following:

- Develop a streamlined process that enables homeowners to subdivide their property and donate a newly created vacant lot to a mission-driven organization such as Trusted Homes Community Land Trust, Habitat for Humanity, or the Ashland Land Bank, for the

development of permanently affordable homeownership opportunities.

- Assist private landowner in taking advantage of the Ashland ADU Program - If the owner does not want to subdivide but is interested in adding a naturally affordable ADU, Sunstone can help facilitate this process of development.

- Education - Engaging the homeowner in understanding the available options, with periodic follow up to determine readiness to proceed or offer clarification.

- Exploring community based or revolving finance models for incremental development of rental housing.

3. Developing a Student Engagement Program with SOU Institute for Applied Sustainability

Sunstone is well-positioned to collaborate with SOU's Institute for Applied Sustainability to create a structured, applied-learning program that engages students in real-world affordable housing work. Sunstone will provide project scoping, supervision, and community connections, while SOU IAS contributes academic integration and faculty mentorship. This partnership aligns sustainability education with practical community outcomes and vital engagement of young people who are highly likely to be impacted long term by the challenges of affordable housing scarcity.

Areas of focus:

- Student-led ground-level audits of Ashland neighborhoods assessing for accessibility, affordability, condition of the build environment, proximity to services etc.

- Develop and implement public relations and marketing strategies to engage those traditionally left out of conversations and decision making around affordable housing and community development in Ashland. Includes communicating the complexity of affordable housing development to community members who see the issue and want to know why more isn't happening to change.

"Community sustainability is not achieved without participation. You matter."

- Examination of and engagement in solutions-based approaches to the question of "Are we navigating a housing crisis or a long term problem?"

- Economic considerations: How our community is affected when housing access is primarily structured as a commodity rather than a human right. Exploration of

community based funding solutions and innovative ownership models.

-Sociological implications: Understanding the function of housing as healthcare and community wellbeing. Assessing and elevating local organizational models that integrate housing and prioritize person-first approaches to accessing services.

4. Ongoing Advocacy and Coordination for Mission-Driven Housing development, including creation of a sliding-scale reimbursement model to support long term organizational sustainability.

Sunstone will continue its role as a coordinating and advocacy presence in Ashland and greater Jackson County—supporting mission-driven landowners, elevating integrated housing models, and aligning local efforts with broader policy and funding opportunities. Sunstone’s neutral, relationship-based approach allows it to convene stakeholders, share information, and sustain momentum across multiple initiatives.

This work includes participation in monthly COC (Continuum of Care) Housing Strategy meetings, Southern Oregon Fair Housing Community Advisory Group Meetings, coordination with and support of JCCLTRG (Jackson County Long Term Recovery Group) housing recovery efforts and affordable housing coordination and strategy meetings convened by Ashland Mayor Tonya Graham.

Development of a sliding scale fee-for-service model would allow Sunstone to provide structured technical assistance and coordination support to mission-driven landowners while maintaining equity and financial accessibility. Fees would be calibrated based on an organization’s size, financial capacity, and project scope, ensuring that smaller congregations, nonprofits, or public entities are not excluded from receiving support. The model would aim to recover a portion of staff time and administrative costs while allowing philanthropic or grant funding to subsidize services for lower-capacity partners.

Describe the target population expected to benefit from the program/activity.

Individuals and households with yearly income at or below 120% Area Median Income. The emphasis on accessibility and Universal Design is to help address the dearth of accessible housing statewide for residents living with disability, wanting to age in place, or who have a disabled family member.

Provide the number of individuals, or households, expected to benefit from the program/activity.

The outcome of this work will be to increase permanently affordable and accessible housing units in Ashland and greater Jackson County. The term affordable in this case reflects the outcome of households at or below 120% AMI paying no more than 30% of their income on housing.

Currently, approximately half of Ashland's residents are housing cost burdened.

If applicable, provide the number and type of housing units to be created.

This work will contribute to meeting the housing gaps identified in the [2021 Housing Capacity Analysis](#), [2023 Housing Production Strategy](#), and [2025 OHNA](#).

Particular emphasis will be paid to projects that result in permanently affordable housing with a priority for universal design.

Provide a detailed timeline leading to the completion of the proposed program/activity.

The work of the Congregational Housing Coalition and incremental development with private homeowners has begun its organizing stage and will be ongoing based upon the interest and needs of those participating. The outcome of completed housing will be dependent upon readiness of landowners, scope of individual projects and available funding.

SOU Institute for Applied Sustainability 2026 cohort begins Spring of 2026 with eligible students continuing throughout the Summer. The following cohort will be chosen and begin Spring of 2027.

Quarterly progress reports for all proposed work throughout the grant period can be provided to the HHSAC upon request.

Provide a map showing the project's location. If the project will serve a specific area, proposed project boundaries should be shown.

Locations for potential development will include churches, congregations and individual landowners within Ashland city limits and the UGB (Urban Growth Boundary).

Properties within the UGB but outside city limits that have the potential for annexation will also be considered.

Additionally, we will specifically explore the potential of properties located within the

cross section of the [QCT \(Qualified Census Tract\) and BLI \(Buildable Land Inventory\)](#)
See attached (A).

3. Project Experience

Describe the respondent's organizational framework, special resources, and any other information to demonstrate that the respondent can effectively and efficiently complete the proposed program/activity.

Sunstone brings a combination of specialized experience and relational capital that positions it to successfully carry out the proposed activities, including:

-Working knowledge of the Affordable Housing Development Process:

Sunstone has direct experience supporting early-stage affordable housing development, including feasibility coordination, developer solicitation, and integration of long-term affordability, accessibility, and service-rich design.

-Coalition-Building Capacity:

Sunstone has demonstrated ability to convene diverse partners such as public agencies, school districts, nonprofits, service providers, and community stakeholders around shared housing goals.

-Mission Stewardship:

Sunstone's role as a neutral, non-developer intermediary allows it to hold vision and public purpose without financial conflict, supporting values-aligned decision making.

-Administrative and Technical Support:

Sunstone provides clear documentation, process management, and translation of technical concepts into accessible information for landowners and community partners.

-Regional Relationships:

Established and growing relationships across Ashland, Jackson County and statewide enable Sunstone to move quickly, align efforts, and avoid duplicating existing initiatives.

Describe the respondent's organizational experience in completing programs or activities similar to the proposal outlined in the RFP.

Sunstone Housing Collaborative provided comprehensive technical assistance and organizational support to the Ashland School District to help advance the Ashland

Attainable Housing Project from early concept toward implementation. Sunstone's role was not to develop the project, but to support the District by reducing administrative and cost burden, clarifying the decision making process, and stewarding a mission-driven vision centered on long term community benefit.

Sunstone supported early-stage planning and feasibility work, including coordination of architectural services to develop a draft master plan that articulated project goals, site considerations, and community priorities. This work helped translate complex housing concepts into clear, accessible materials that informed District leadership and stakeholders.

Sunstone also provided technical and administrative support for the developer solicitation and selection process. This included drafting and managing a Request for Proposals, coordinating consultant input, and supporting the School Board in evaluating proposals based on alignment with project goals, capacity, and long-term affordability.

In addition, Sunstone facilitated partnership development among housing professionals, service providers, and community organizations, including elevating the integration of co-located early childhood education as a core project element. We helped ensure that accessibility, sustainability, and public purpose remained central throughout planning and decision-making.

Sunstone served as a faithful steward and coordination partner helping the Ashland School District navigate the complexity of early-stage affordable housing development while minimizing financial risk and maintaining focus on community-centered outcomes.

Additionally, Sunstone has participated in and contributed to other housing initiatives such as:

- Jackson County Long Term Recovery Group Housing Workshops
- Fair Housing Training with the Fair Housing Council of Oregon
- Panelist at Housing Oregon's Annual Conference and the Housing Land Advocates conference at PSU discussing the importance of cross-sector collaboration for housing and community development.
- Ongoing inquiry, collaboration and advocacy for accessible housing design and development.

• **List other organizations involved with this project and their level of involvement.**

Leaven Community

Rev. Julia Nielsen, Director of Organizing: Land and Housing Coalition

Leaven Community provides strategic consultation, organizing support, and technical guidance that can assist Sunstone in development of the congregational housing initiative. Sunstone will serve as the local facilitator and connector by coordinating relationships, aligning efforts with regional housing priorities, and ensuring that congregations are supported in navigating early feasibility, partnership building, and values-based decision-making.

This collaboration will reduce barriers for congregations interested in housing development, expand local capacity, and unlock underutilized land for community-serving housing.

Jackson County Long Term Recovery Group (JCCLTRG)

JCCLTRG will be the host and convener for an upcoming Congregational Housing Workshop to which Sunstone will contribute through coordination, administration and follow-up.

4. Funding Request

- **Provide the requested amount of Ashland Housing Trust Funds.**

\$51,460

- **Provide the amount of any Community Development Block Grants requested under a separate application (if applicable).**

N/A

- **Provide a detailed project budget that includes all other funding sources anticipated to support the program/activity.**

Please see attached (B)

- **Provide the proposed percentage of matching funds, including the estimated value of donated land or labor, demonstrating that the Affordable Housing Trust Fund contribution shall not exceed more than 50% of the total project, or program, cost.**

Sunstone capacity through the duration of the AHTF grant period of July 2026-July 2027 will be at least 60% covered by other sources. Additionally, the individual organizational capacity of Leaven Community and JCCLTRG will contribute in-kind to the collaborative work outlined in this proposal.

- **Provide a detailed budget including but not limited to land acquisition costs, materials, building permit costs, predevelopment costs, professional services, and any other administrative costs.**

Please see attached (C)

Letters of Support: (Please see attached)

Kathy Kali

Sue Crader

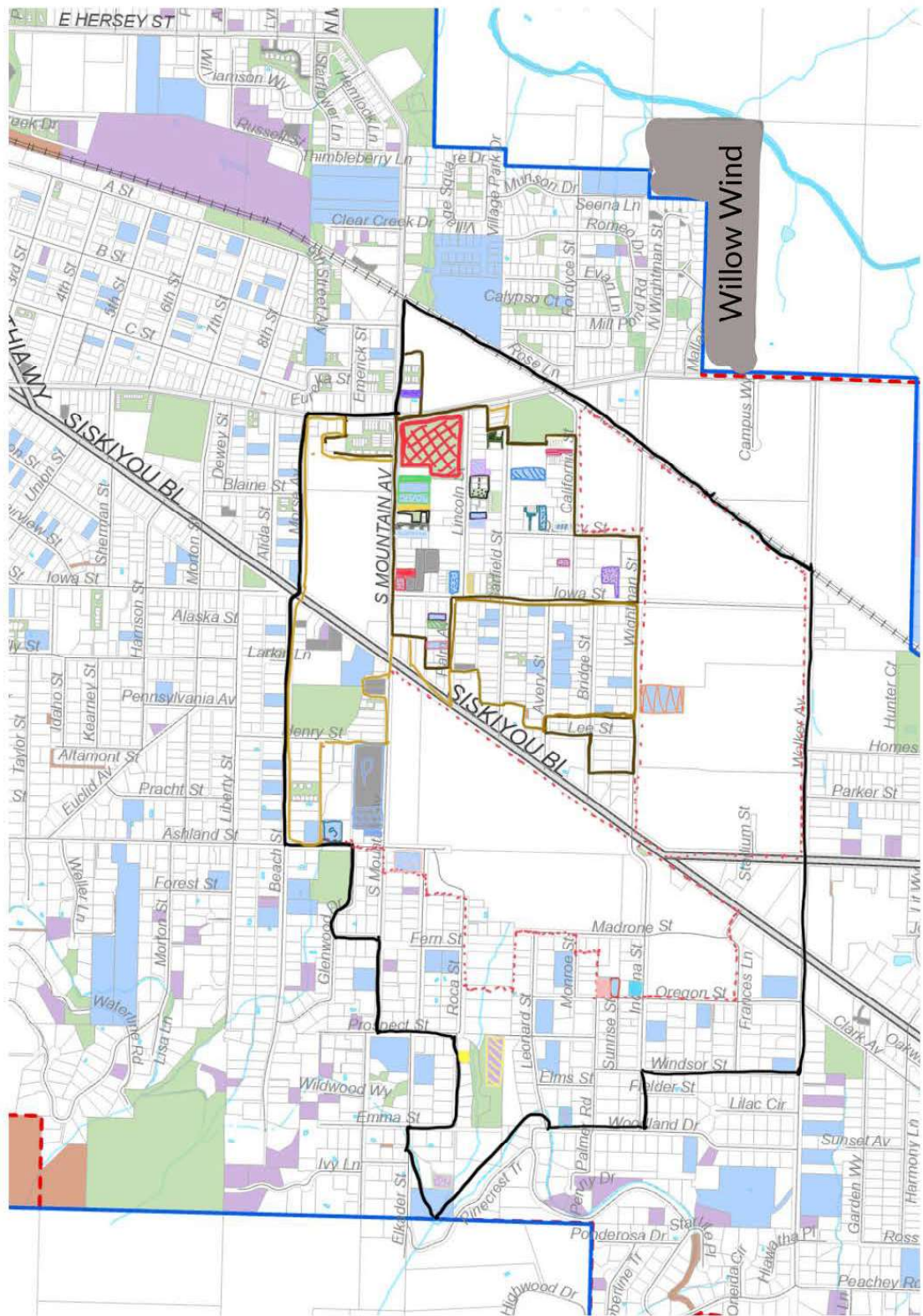
Chris Brown

Rebecca Dyson

Ashland Oregon

Buildable Lands Inventory (BLI) + Qualified Census Tract (QCT)

In Oregon, Qualified Census Tracts (QCTs) are prioritized for affordable housing development through the Low-Income Housing Tax Credit (LIHTC) program.



Outlined in black is the Ashland QCT, which includes the proposed site for the ASD initiated Ashland Attainable Housing Project.

Outlined and hatched in red is the proposed site of the Ashland Attainable Housing Project

Within the QCT there is a smaller area outlined in dark brown that is zoned R-3 which allows for multifamily dwelling development

The entire QCT resides within city limits and within the Urban Growth Boundary (UGB).

References:

HUD Qualified Census Tract

<https://www.huduser.gov/portal/datasets/qct.html>

OHCS Qualified Allocation Plan

<https://www.oregon.gov/ohcs/rental-housing/housing-development/development-resources/pages/qualified-allocation-plan.aspx#:~:text=Some%20projects%20have%20always%20been,incomes%20below%2060%25%20of%20the>

City of Ashland Zoning Map

<https://maps.ashlandoregon.gov/documents/ashlandgis::official-zoning-map/explore?path=>

Jackson County Interactive Mapping

<https://jcgis.maps.arcgis.com/apps/MapSeries/index.html?appid=fa99a30541d94b86aef4a39bc68d0580>

Ashland, Oregon Buildable Lands Inventory

https://gis.ashland.or.us/hub/pdf/planning_Development/2019_Buildable_Lands_Inventory_Map_36x24.pdf

<https://ashland.news/ashland-buildable-lands-inventory-approved-by-council/>



Attachment B/C

Sunstone Housing Collaborative: Ashland Housing Trust Fund Budget							
		1.Capacity Building: Development of congregational housing coalition	2.Capacity Building: SFH Lot expansion with affordable housing	3.Capacity Building: Program development with SOU Institute for Applied Sustainability	4.Capacity Building: Ongoing Advocacy and Coordination for Affordable Housing Development	AAHP project support and community engagement	
Percentage of time	100%	25%	20%	25%	5%	25%	
Hours	1560	390	312	390	78	390	
Expense							
Total Payroll (Salary, fringe and taxes)	\$102,060	\$25,515	\$20,412	\$25,515	\$5,103	\$25,515	
Advertising/Marketing	\$1,300	\$325	\$260	\$325	\$65	\$325	
Insurance	\$2,987	\$747	\$597	\$747	\$149	\$747	
Office Expenses	\$3,835	\$959	\$767	\$959	\$192	\$959	
Contract and Professional Fees (Legal, Accounting, Consulting/TA, Environmental Testing, ORCA APP and SD)	\$53,350	\$13,338	\$10,670	\$13,338	\$2,668	\$13,338	
Other Expenses (community engagement facilities, supplies, translation services)	\$8,000	\$2,000	\$1,600	\$2,000	\$400	\$2,000	
Total Expenses July 2026-July 2027	\$171,532	\$42,883	\$34,306	\$42,883	\$8,577	\$42,883	
Revenue							
Corporate & foundation grants							
Lithia Motors Community Grant	\$ 1,000						
(Pending) Thriving Communities Noncompete Grant	\$ 75,000						
RVCOG	\$ 25,000						
(Pending) OHCS GHAP Project Feasibility	\$ 50,000						
Total Corporate & Foundation	\$ 151,000						
Government grants & contracts							
(Pending) AHTF +AAHP predev	\$ 50,000						
Ashland Housing Trust Fund Request	\$51,460	\$17,153	\$13,723	\$17,153	\$3,431	\$0.00	
Total Government Grants & Contracts	\$ 101,460						
Other revenue							
Carryover	\$ 35,000						
Total Other revenue	\$ 35,000						
Total Revenue	\$ 287,460						

Sue Crader, Executive Director
Ashland Supportive Housing and Community Outreach
693 Suite B, Washington Street
Ashland, Oregon 97520
ashinc@ashlandoregon.org
541-488-2870

November 5, 2024

To Whom it May Concern,

I am writing to express my strong support for the grant application submitted by Krista Palmer of the Sunstone Housing Collaborative to fund the development of affordable housing in Ashland, Oregon.

The urgent need for affordable housing in our community cannot be overstated. With the rising cost of living and limited housing options, many families are struggling to find safe and secure places to live. This project will not only provide much needed housing but also promote social stability and economic growth.

Sunstone Housing Collaborative has demonstrated a commitment to improving our community by addressing significant gaps in housing needs. Enrollment in the excellent school system is declining in large part due to the lack of work force housing and available childcare. For people with disabilities who have grown up and attended school here there are few options for low-income accessible housing, with very long waitlists for what little there is. The inclusive design of this project and the collaboration it is encouraging will provide more than housing; it will provide opportunities for many sectors of the community to stabilize and grow.

I am confident that this grant will have a significant positive impact on our community, providing long-term benefits for its residents. Therefore, I wholeheartedly support this application and urge you to give it your favorable consideration.

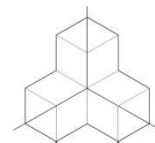
Thank you for your time and consideration.

Sincerely,



Sue Crader, Executive Director
Ashland Supportive Housing and Community Outreach





arkitek
426 a street, suite 101
ashland, or 97520
541.591.9988

Letter of Support for Sunstone on Behalf of Krista Palmer

2.16.26

Greetings,

I am writing this letter of support for Sunstone Housing Collaborative towards the effort to build organizational capacity for the pursuit of furthering work into the area of congregational housing development and partnership with the SOU Institute for Applied Sustainability focusing on affordable housing development.

I have had the pleasure of working alongside Krista Palmer, Executive Director, Sunstone, starting in early 2024 on the development and coordination of a comprehensive plan towards Universal Accessibility and further on the comprehensive plan design process for the Lincoln Field Ashland School District/Sunstone housing project.

Throughout this duration Krista has kept appropriate focus towards the successful coordination and long-distance vision required of a project of this magnitude with rigor, fortitude, and compassion. I am a firm believer in cross-disciplinary collaboration, and Krista brings a balanced approach to navigating relationships across multiple regional community groups (Jackson Care Connect, OSCIC, Living Opportunities, Fair Housing Council, OCDC) combined with leadership that provides a unique approach to her position.

The ability to understand the challenges facing fair, equitable, and accessible housing across the Southern Oregon region and leverage the community positioning of the SHC (Sunstone Housing Collaborative), allows for both agility and efficacy not found in larger public sector domain operations.

I, Christopher Brown, fully endorse and support Krista Palmer via Sunstone with assurances grant resources will reciprocate the vested interest of the organization and Ashland Housing Trust Fund as exhibited in the integrity of both character and organization.

christopher brown, aia/ncarb/LEED
principal, **arkitek:design&architecture**



February 17, 2026

To Whom It May Concern,

It is my distinct honor to write this letter of reference in strong support of Sunstone Housing Collaborative and its application for grant funding to expand affordable housing in Ashland. As Chair of the Ashland School District Board of Directors, I have had the privilege of witnessing firsthand the vision, dedication, and community impact that Sunstone has brought to one of our region's most pressing challenges.

Sunstone Housing Collaborative was established in late 2023 as a 501(c)(3) nonprofit specifically to support the educational mission of the Ashland School District and the City of Ashland's Housing Production Strategy. It was born out of a clear-eyed recognition that the decline in ASD enrollment, ongoing since 2001 and resulting in the closure of two elementary schools, is inextricably linked to Ashland's severe shortage of affordable housing. With housing costs in Ashland running approximately ten times the area's median income, a majority of the district's own employees cannot afford to live in the community they serve. More troubling still, over 100 of our students are homeless.

Furthermore, Sunstone does not simply advocate for affordable housing. They do the complex, patient, relationship-intensive work of making it happen. The organization has engaged the public through listening sessions, worked transparently with the school board, and centered the needs of Ashland's children and families throughout every step of the process. Continued investment in Sunstone's work is an investment in the long-term health of our schools, our community, and the families who make Ashland the remarkable place it is.

In the time since its founding, Sunstone has demonstrated an extraordinary capacity to translate a complex problem into actionable, community-centered solutions. I support the City of Ashland's investment in this innovative action oriented non-profit to help solve an urgent community problem.

Sincerely,

Rebecca Dyson

Board Chair, Ashland School District
885 Siskiyou Blvd, Ashland, OR 97520

5/18/25

To Whom It May Concern,

I am writing to express my strong support of the Sunstone Collaborative Affordable Housing Project. As a real estate investor, housing advocate, and professional property manager, I can tell you these folks are doing great work. And certainly, there is a big need in the Ashland, Oregon community. Due to inflated housing prices many families are not able to live in Ashland to raise their children. Ashland School District is suffering declining enrollment. The District itself has undergone widespread layoffs, and the school-to-school rating of the Ashland High School has gone down from #5 in the State of Oregon to #67.

As you may be aware, developing affordable housing requires complicated partnerships between non-profits, developers, builders, grantors, and municipalities. It's no easy task! During the last 2 years Sunstone has established their NP status, attracted a high-integrity developer, builder, and collaborations with the Ashland School District. And I believe Krista Palmer and the team at Sunstone are also uniquely skilled to navigate this process.

Krista Palmer, Sunstone Executive Director, is a calm, diplomatic and intelligent leader assessing the various opinions in the community, and moving forward to create win/win solutions. There has been a fair bit of controversy surrounding which parcel of land to choose for Sunstone's initial development and Ms. Palmer has done her due diligence to oversee a lengthy community input process to make sure everyone feels heard. In addition, both Ms. Palmer and board member Jill Franko have helped answer questions on social media, and explain the various stages of

development, and also how the school district stands to benefit financially from the project in perpetuity.

The transparency, hard work, and dedication of the Sunstone team are admirable! Having done small-scale real estate development myself, and been part of a larger private project at Midtown Lofts, I am impressed with what they have created, often initially with countless volunteer hours. Now of course their ED is salaried, as she should be. I believe Executive Director's are the "heart" of the project and should be paid an executive level salary for "holding the torch" with initial volunteer labor, and then providing ongoing coordination between all the entities and organizations on the project.

I hope you will support the Sunstone Project with your grant funds, and any other support you have available. They are essentially "saving" the Ashland School District with a big financial boost from ongoing revenues. And they are making sure this community can stay family-friendly and accessible to families of all income levels.

Thank you,

Kathy Kali

Property Manager, Midtown Lofts Apartments

Staff Evaluation AHTF

The City of Ashland has received four applications for totaling \$401,460 for \$200,000 in competitively available Affordable Housing Trust Funds (AHTF). The City of Ashland Housing and Human Services Advisory Committee will hold a public hearing on March 26, 2026, to review the grant requests and make a recommendation to forward to the City Council for consideration. The Council will make the final award selections at a public hearing scheduled for April 14, 2026. The staff's assessment of each of the proposals received, and recommendations regarding the allocation of the 2026 AHTF funds are provided on the following pages.

Proposals Received

Organization	Proposed Project	AHTF Funds Requested	Resolution 2008-34 Preferences	City Council Identified Priority	City Council Vision and Values
Trusted Homes	Capacity Building in support of the Beach Creek Project, including homeowner Marketing, outreach and education, professional services, legal fees, education, and any project costs not covered by the LIFT grant.	\$100,000	4.1a -New affordable housing units 4.1c -Land Trust Model-perpetual affordability. 4.1d -joint ventures, non-profit and for-profit partnerships. 4.1h -Long Term Affordability 4.1i -Sponsored by non-profit organization. 4.1j - Private and State funding source leverage.	Provision of Affordable Housing Capacity Building New Housing Development.	Community affordability, including available housing and childcare. Belonging through mutual respect and openness, inclusion and equity Quality of life that underpins the City's economic vibrancy

Bentella LLC	Support Construction of 8 deed restricted rental homes targeted to households earning 80% AMI or below.	\$200,000	4.1a -New affordable rental housing units. 4.1d -joint ventures, non-profit and for-profit partnerships. 4.1h -Long Term Affordability 4.1j - Private and State funding source leverage.	Provision of Affordable Housing New Housing Development.	Community affordability, including available housing and childcare. Belonging through mutual respect and openness, inclusion and equity Quality of life that underpins the City's economic vibrancy
Sunstone Housing Collaborative -Ashland Attainable Housing Project (AAHP)	Funding to support application to State funding programs to fund affordable housing development.	\$50,000	4.1a -New affordable rental housing units. 4.1d -joint ventures, non-profit and for-profit partnerships. 4.1h -Long Term Affordability 4.1j - Private and State funding source leverage.	Capacity Building Provision of Affordable Housing New Housing Development	Community affordability, including available housing and childcare. Belonging through mutual respect and openness, inclusion and equity Quality of life that underpins the City's economic vibrancy
Sunstone Housing Collaborative	Capacity Building to establish and facilitate a program that engages the	\$51,460	4.1i -Sponsored by non-profit organization.	Capacity Building	Community affordability, including available housing and childcare.



	homeowners, students and the Faith Community in the mission driven development of affordable housing.				Belonging through mutual respect and openness, inclusion and equity Quality of life that underpins the City's economic vibrancy
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Funding Requested/Available

A total of \$200,000 in AHTF is expected to be available to distribute to applicants for projects meeting the priorities of the City Council and identified in the AHTF policies as defined by resolution 2008-34.

Assessment Criteria

Staff have assessed the proposals to determine whether they meet the guidelines established by resolution 2008-34. Three areas are evaluated for each proposal.

- Applicants must meet the criteria outlined in Section 2; Eligible Applicants.
- Proposed activities must be eligible as detailed in Section 3; Eligible Uses and Activities.
- Is the activity a preferred activity as defined in Section 4; Preferences and the priorities identified by the City Council at their regular council meeting on December 2, 2025.

Preferences within resolution 2008-34 are not given a priority. There are ten preferences identified in Section 4. Projects that meet an identified preference are noted in the preference column.

Proposal Evaluation

Trusted Homes: Staff have reviewed the Trusted Homes proposal to determine whether it meets the eligibility criteria for uses and for applicants and if the proposal addresses the preferences within section 4 of resolution 2008-34 and the Priorities of identified by the City Council.

- The project is in support of the development of new housing units.
- The entity submitting the proposal has the capacity to carry out the project.
- The project is currently underway and is ready to implement.
- The budget and timeline are thorough and realistic.



- The project addresses unmet housing needs as identified in the Housing Capacity Analysis.
- The project addresses a strategy identified in the Housing Production Strategy.
- The project seeks to deed restrict property to develop and retain housing units as affordable to a population with a documented need.
- The project addresses long term affordability.
- The project meets the goals and priorities of the City Council and the AHTF program.

Bentella LLC: Staff have reviewed the Bentella LLC proposal to determine whether it meets the eligibility criteria for uses and for applicants and if the proposal addresses the preferences within section 4 of resolution 2008-34.

- The project is required by planning Action # T1-2025-00276 to provide new affordable housing units targeted to households earning 80% of Area Median Income for a period of 30 years, which are not eligible for a deferral of System Development Charges.
- The developer submitting the proposal has the capacity to carry out the project and has demonstrated success completing projects of similar scope.
- The project is ready for implementation, has secured planning approval.
- The budget and timeline are thorough and realistic.
- The project addresses unmet housing needs as identified in the Housing Capacity Analysis.
- The project retains a unit as affordable to a population with a documented need.
- The project addresses long-term affordability (30 years).
- The project is a for-profit/non-profit partnership.
- The project meets the goals and priorities of the City Council and the AHTF program.

Sunstone Housing Collaborative Affordable Attainable Housing Project: Staff have reviewed the Sunstone Proposal to determine whether it meets the eligibility criteria for uses and for applicants and if the proposal addresses the preferences within section 4 of resolution 2008-34.

- The agency submitting the proposal has the capacity to carry out the project.
- The project maximizes partnerships in the community.
- The project is to provide new affordable housing units.
- The budget and timeline are thorough and realistic.
- The project addresses unmet housing needs as identified in the Housing Capacity Analysis.
- The project addresses long-term affordability.
- The project is a for-profit/non-profit partnership.
- The project meets the goals and priorities of the City Council and the AHTF program.



Sunstone Housing Collaborative–Capacity Building: Staff have reviewed the Sunstone Housing Collective proposal to determine whether it meets the eligibility criteria for uses and for applicants and if the proposal addresses the preferences within section 4 of resolution 2008–34.

- The project is aimed at building capacity to offer support and to facilitate organizations and individuals to develop affordable housing.
- The project maximizes partnerships in the community.

Staff Evaluation and Funding Recommendation

Sunstone Housing Collaborative

Sunstone Housing Collaborative submitted an Affordable Housing Trust Fund application to support predevelopment work associated with the Ashland Attainable Housing Project on Ashland School District property at 79 Lincoln Street. The request is focused on completing the ORCA Intake submission to Oregon Housing and Community Services, which is the State’s centralized application process used to evaluate projects seeking major housing resources such as Low-Income Housing Tax Credits, LIFT funding, and other state housing programs. The broader project proposes a mixed-income housing development that could include approximately 91 rental units and 12 to 15 ownership units serving families and school district employees. While the request does not directly construct housing units during this funding cycle, the work is intended to position a large-scale housing development to compete for substantial state and federal housing funding.

Staff Recommendation: Award partial funding in the amount of **\$25,000** to support advancement of the ORCA submission and associated predevelopment coordination.

Trusted Homes

Trusted Homes submitted an Affordable Housing Trust Fund application requesting support for the development of six permanently affordable homeownership units within the Beach Creek subdivision utilizing the Community Land Trust model. Under this structure, the nonprofit retains ownership of the land and sells the homes to income qualified buyers through a long-term ground lease and resale restrictions that preserve affordability for future homeowners. The project will construct six homes serving households at or below 80% of Area Median Income and represent an important step in establishing a Community Land Trust framework in Ashland. In addition to supporting the Beach Creek homes, the funding will help establish the legal agreements, stewardship policies, and operational framework necessary for the long-term success of the Community Land Trust model for this and future permanently affordable homeownership projects in the community.

Staff Recommendation: Award **\$75,000** in Affordable Housing Trust Fund assistance.



Bentella LLC

Bentella LLC submitted an Affordable Housing Trust Fund request to support construction of eight deed restricted affordable rental units within the Caldera Oaks subdivision at 300 Clay Street. The units will be located within two four-plex buildings and will be restricted to households earning up to 80% of Area Median Income for a minimum affordability term of 30 years. Staff notes that the eight affordable units proposed in this application were required through the subdivision and annexation approval under Planning Action T2-2025-00060. As approved, the units qualify as affordable housing at 80% AMI for a 30-year term; however, because they are not restricted to 60% AMI for a 60-year term, they are not eligible for the City's System Development Charge deferral program. The project is nevertheless well positioned for near-term delivery, with land use approvals complete, infrastructure construction underway, and building permits submitted.

Staff Recommendation: Award of **\$75,000** in Affordable Housing Trust Fund assistance to partially offset approximately \$88,000 in System Development Charges otherwise due for the affordable units.

AHTF Balance

Following the above awards, staff recommend retaining **\$25,000** in the Affordable Housing Trust Fund as carryover to support potential predevelopment costs for future affordable housing projects. Maintaining a modest balance in the fund allows the City to respond to emerging opportunities where small amounts of early-stage funding can help advance affordable housing proposals to the point where they can compete for larger state or federal funding sources.



Memo

DATE: March 26, 2026

TO: Housing and Human Services Advisory Committee

FROM: Linda Reid, Housing Program Manager

DEPT: Planning

RE: Brief Discussion about the Community Resource Fair.

The Committee needs to have a brief discussion about the potential date for the Community Resource Fair in order to secure a location.

Planning Department

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Ashland, Oregon 97520
ashland.or.us

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