Council Business Meeting Agenda

ASHLAND CITY COUNCIL
BUSINESS MEETING AGENDA
Tuesday, April 21, 2026
Council Chambers, 1175 E Main Street

Live stream via RVTV Prime at rvtv.sou.edu or broadcast on Spectrum 180.

Public comment is welcome on public forum topics and agenda items.
To **speak electronically** during the meeting or to submit **written comments** in advance, please complete the online Public Comment Form by 10 a.m. the day of the meeting.

6:00 p.m. Regular Business Meeting

I. EXECUTIVE SESSION 5:00 p.m.
1. To consult with counsel concerning the legal rights and duties of a public body with regard to current litigation or litigation likely to be filed pursuant to ORS 192.660 (2)(h). 2. To conduct deliberations with persons designated by the governing body to negotiate real property transactions.

II. CALL TO ORDER

a. Land Acknowledgement**

III. PLEDGE OF ALLEGIANCE

IV. ROLL CALL

V. MAYOR'S / CHAIR OF THE COUNCIL ANNOUNCEMENT

a. A Proclamation in Honor of Farmworkers

VI. APPROVAL OF MINUTES

a. Minutes of the April 6, 2026 Study Session Meeting
b. Minutes of the April 7, 2026 Business Meeting
c. Minutes of the March 27, 2026 Council Called Special Meeting
d. Minutes of the April 13, 2026 Council Called Special Meeting

VII. CONSENT AGENDA

VIII. SPECIAL PRESENTATIONS

IX. PUBLIC FORUM

X. PUBLIC HEARING

a Public Hearing on 2026–2027 Community Development Block Grant (CDBG) Award and Action Plan
.

b. Resolution Approving a Supplemental Budget

XI. ORDINANCES, RESOLUTIONS AND CONTRACTS

a. Approval of a Construction Contract with Insituform Technologies, for the Wastewater Collection Rehabilitation–CIPP Construction Project (PW 2024-28)

XII. UNFINISHED BUSINESS

XIII. NEW BUSINESS

a Social Service Grant Awards

.

b. Affordable Housing Trust Fund Evaluation and Award

c. Request for Council to reconsider direction on lawn hours

d. Citizens' Budget Committee Appointment

XIV. CITY MANAGER REPORT

a. Look Ahead 2026

XV. OTHER BUSINESS FROM COUNCIL MEMBERS/REPORTS FROM COUNCIL LIAISONS

XVI. ADJOURNMENT

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

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

**** LAND ACKNOWLEDGEMENT**

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

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

A Proclamation in Honor of Farmworkers

WHEREAS, an estimated 72,000 farmworkers are employed across Oregon and make essential contributions to our agricultural economy; and

WHEREAS, an estimated 2.6 million farmworkers are employed across our nation driving a thriving agricultural industry that provides over $1.5 trillion in economic benefit annually; and

WHEREAS, farmworkers are the critical first step in the food supply system that feeds 341 million Americans and many millions more beyond our borders; and

WHEREAS, farmworkers are essential to the economic and cultural fabric of our communities, yet their contributions often go unseen; and

WHEREAS, farmworkers provide highly skilled, and often challenging labor that is often taken for granted; and

WHEREAS, the City of Ashland is proud to honor the legacy and continued perseverance of the farm workers movement and its ongoing fight against oppression and discrimination and for dignity, equality, and fair working conditions.

NOW, THEREFORE, I, Tonya Graham, Mayor of the City of Ashland, Oregon, on behalf of the City Council, do hereby make this proclamation in support of farmworkers in our community and across our nation, and call on the people of Ashland to take the time learn about the farmworkers movement and find ways to support our local farmworkers.

In Ashland we are Better Together.

Dated this 21st day of April 2026

Alissa Kolodzinski, City Recorder

Tonya Graham, Mayor

ASHLAND CITY COUNCIL
STUDY SESSION MINUTES
Monday, April 6, 2026

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

Council Present: Councilors Bloom, DuQuenne, Hansen, Kaplan, Dahle, and Sherrell.
Staff Present:

Sabrina Cotta	City Manager
Jordan Rooklyn	Deputy City Manager
Chris Chambers	Forestry Officer

I. **Call to Order**

II. **Reports and Presentations**

a. Status Update on the Madrone Ridge Acquisition Project

Rooklyn, Chambers, and MiK McKee with Western Rivers Conservancy (attending via Zoom) presented a status update on the Madrone Ridge Acquisition Project.

Project Overview: Madrone Ridge is a 1,974-acre property adjacent to Ashland's urban growth boundary, situated approximately three-quarters of a mile below Reeder Reservoir. The property serves as a strategic buffer for wildfire mitigation, watershed and viewshed protection, wildlife habitat conservation, and potential future recreation. Western Rivers Conservancy holds a purchase and sale agreement for $7,340,000—based on a July 2024 appraisal establishing fair market value—with total project costs estimated at $7,415,000 to account for a forest management plan, closing costs, and a Phase 1 environmental review. The city has until September 30, 2027 to close.

Funding Status: Of the total project cost, $5,560,000 in federal funding has been secured through the Forest Legacy Program in the FY2026 federal budget. The remaining $1,855,000 non-federal match (25%) has not yet been secured. A recent application to the Oregon Watershed Enhancement Board (OWEB) did not rank in the top tier for funding; Western Rivers will apply again in September 2026. Additional funding opportunities include up to $1,000,000 through the Oregon Parks and Recreation Department local government grant program (opening January 2027) and a potential low-interest loan through the DEQ's Clean Water State Revolving Fund.

Permitted and Prohibited Uses: Under the Forest Legacy Program, permitted uses include trail connectivity, educational programming, and daytime recreation. Prohibited uses include overnight camping, significant motorized vehicle use, and residential development. Forest Legacy funds require fee ownership by a unit of government, precluding transfer to a private organization.

Forest Management: Chambers reported that approximately 69% of the property (1,354 acres) has already been treated for fuels reduction, largely through prior partnership with Lomakatsi Restoration Project, The Nature Conservancy, and federal and state grants. Ongoing maintenance, primarily prescribed burning, is estimated at $100,000 per year, which falls within the city's existing wildfire mitigation fund capacity of approximately $250,000 annually for forestry activities. Chambers noted

that grant funding, training partnerships (including tribal crews through Lomakatsi), and the Rogue Interagency Training Association could further offset those costs.

Trail Connectivity: Existing informal trails on approximately 300 acres (roughly 15% of the property) connect back toward the Ashland watershed trail network. All trails would require formal design and approval through the Parks Commission under the city's existing process, with on-the-ground maintenance expected to be performed by user groups such as Ashland Woodland and Trails Association (AWTA) and Rogue Valley Mountain Bike Association (RVMBA). Staff noted a small privately-owned gap parcel through which all trail connectivity funnels, which would require either acquisition or a formal easement before recreational use could proceed.

Wildfire Risk Context: Chambers emphasized that the property's location—at the end of a dead-end road in the path of the dominant summer wind pattern—makes it uniquely critical for protecting Ashland from wildfire. An OSU report on file identifies this property as one of the most important blocks for wildfire defense. If not acquired, the property could ultimately be subdivided into homesites, creating both additional ignition risk and firefighter exposure, with no regulatory mechanism available to compel fuel hazard reduction by private owners.

Council Discussion: Council raised questions regarding the appraisal methodology and whether comparable sales accounted for deed restrictions, the possibility of renegotiating the purchase price if secondary grant funding falls short, the enforceability of grant conditions by future councils, and the feasibility of Jackson County serving as an alternative owner. Staff confirmed the purchase price is locked in the current agreement, that any grant agreement would be reviewed and agreed to by the City Attorney, and that the Forest Legacy Program requires a governmental entity as the fee owner.

Councilors also raised questions about trail management models used by neighboring communities (e.g., Klamath Falls/Spence Mountain, Grants Pass/Dollar Mountain), the need for a formal discussion with the Parks Commission before any decision is made, and the relationship of this project to the Community Wildfire Protection Plan (CWPP) and existing watershed thinning work.

Next Steps / Staff Direction: Graham summarized council direction for the May return presentation as follows: (1) provide a detailed breakdown supporting the $100,000 annual forest management estimate, showing staff's work and accounting for inflation; (2) assess the impact of Madrone Ridge management on staffing capacity for CWPP implementation and ongoing watershed work; and (3) contextualize the economies of scale achieved by managing this property in conjunction with adjacent city forest lands. The May agenda item will ask council whether to authorize the staff time investment required to proceed to a full master planning process.

b. *Councilor-led Discussion on the Food and Beverage Tax*

DuQuenne and Bloom introduced this item, and Cotta and Rooklyn provided supporting information.

Background: The Food and Beverage (F&B) Tax applies to prepared foods and non-alcoholic beverages sold at restaurants, grocery stores, delis, caterers, and coffee shops in Ashland, including takeout and delivery. The tax generates approximately $3,000,000 annually. Currently, 25% is allocated

to Parks for capital development and rehabilitation, and 75% goes to the Street Fund. The tax is scheduled to sunset on December 31, 2030. DuQuenne noted that the street fund debt has been secured against anticipated F&B revenues through 2030, meaning reallocation prior to that date would require the General Fund to backstop the street debt obligation.

Proposed Scenarios: DuQuenne presented two reallocation scenarios for discussion. Scenario 1 would direct 25% to Parks, 10% to streets, 10% to a dedicated infrastructure reserve fund, and 55% to the water treatment plant. Scenario 2 would direct 25% to Parks, 10% to Streets, and 65% to the new water treatment plant. The stated intent of both scenarios is to offset the financial burden on ratepayers from rising rates by using F&B revenue—as it previously offset wastewater treatment plant debt—to fund the new water treatment plant.

Key Discussion Points: The council discussed the tension between maintaining street rehabilitation funding and addressing rate pressure on residents. Rooklyn clarified that the street program's pavement management strategy proactively rehabilitates streets before they deteriorate to a pothole stage, which is significantly more cost-effective than reactive repair; reducing that funding risks a reclassification of streets to a more expensive "red" condition. Staff noted that a portion of ODOT-owned roadways (including Siskiyou Boulevard and much of Ashland Street) falls outside city maintenance responsibility. Cotta advised that staff would not recommend using non-enterprise funds to subsidize enterprise fund obligations and noted that the city's existing flat fees (wildfire, public safety, parks) are regressive by nature, suggesting a future study session on the use of a property-tax-based levy as an alternative funding mechanism. Council members broadly agreed that the F&B tax conversation is important given its 2030 sunset and the need to present voters with a clear, well-supported proposal. Concern was expressed about creating new deferred maintenance liabilities while attempting to resolve existing ones.

Outcome: Council consensus supported bringing this item back in August with analysis from Public Works on the street program's funding needs, a realistic assessment of what reallocation would mean for street maintenance, and a ratepayer impact analysis showing how the various scenarios affect the average Ashland resident.

III. **Adjournment of Study Session**.

The meeting was adjourned at 7:02 pm.

Deputy City Manager Jordan Rooklyn

Mayor Tonya Graham

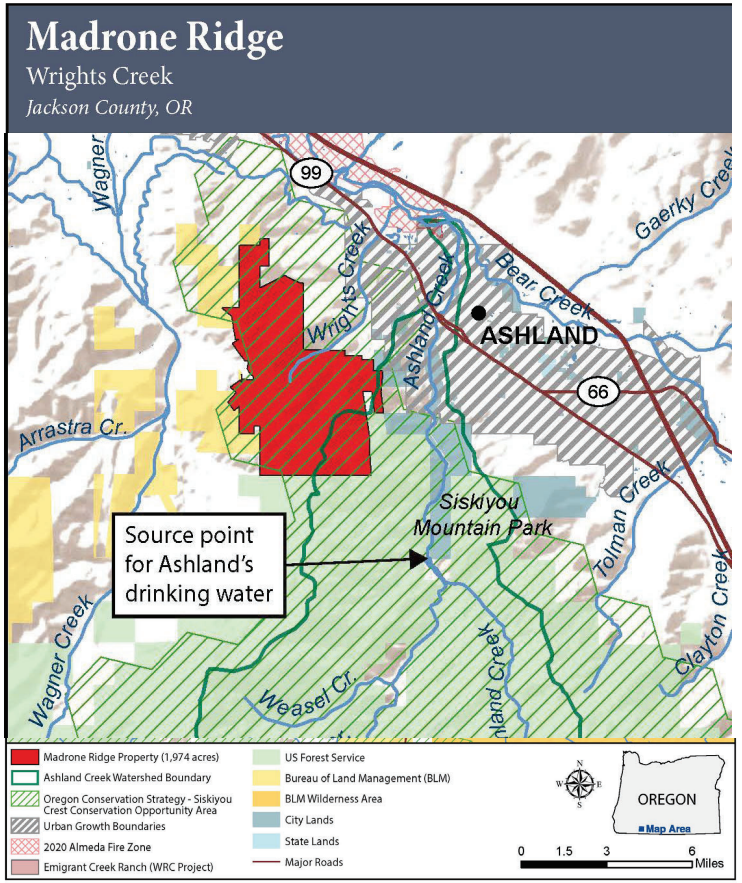
DRAFT

Status Update on Madrone Ridge Acquisition Project

Western Rivers Conservancy

Project Summary

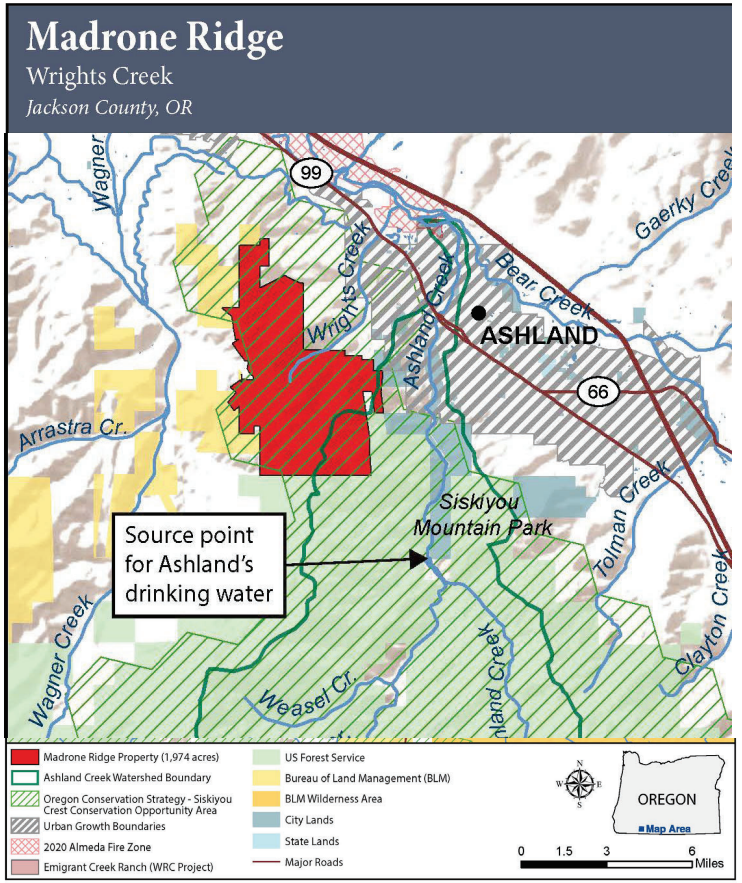
- 1,974 acres Madrone Ridge property, approximately 270 acres within our watershed.
- Property has potential for wildfire mitigation, forest management, conservation, recreation, and keeping Ashland's viewshed intact.
- Western Rivers Conservancy would purchase the property and then transfer it to the City of Ashland as the owner and steward.
- Initial due diligence is complete; have until Sept 30, 2027, to acquire the property.



Funding Status

Property cost: $7,415,000

- July 2024 Appraised Value: $7.34 million
- Secured $5.56 million in Federal funding
- Still need $1.885 million in non-Federal match
  - OWEB Grant – September 2026
  - OPRD LGGP Grant – January 2027
  - Clean Water State Revolving Fund Loan



Recreational Activities

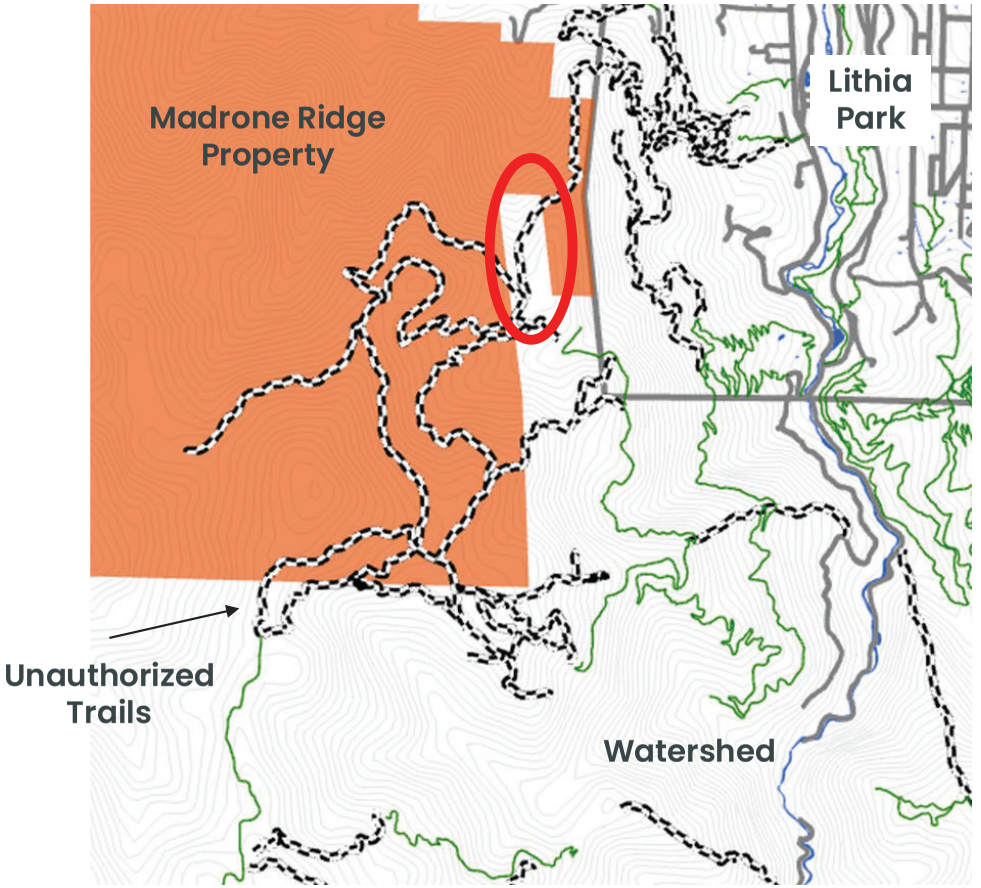
Allowed recreation activities will depend on grant restrictions.

- ✓ Trail connectivity using existing trails
- ✓ Day-time educational use
- ✗ Overnight camping
- ✗ Significant public vehicle access

Trail Connectivity

Existing unauthorized trails could be upgraded to connect our Watershed trails to BLM land and our downtown.

Trails beyond this area would likely be limited by conservation requirements.

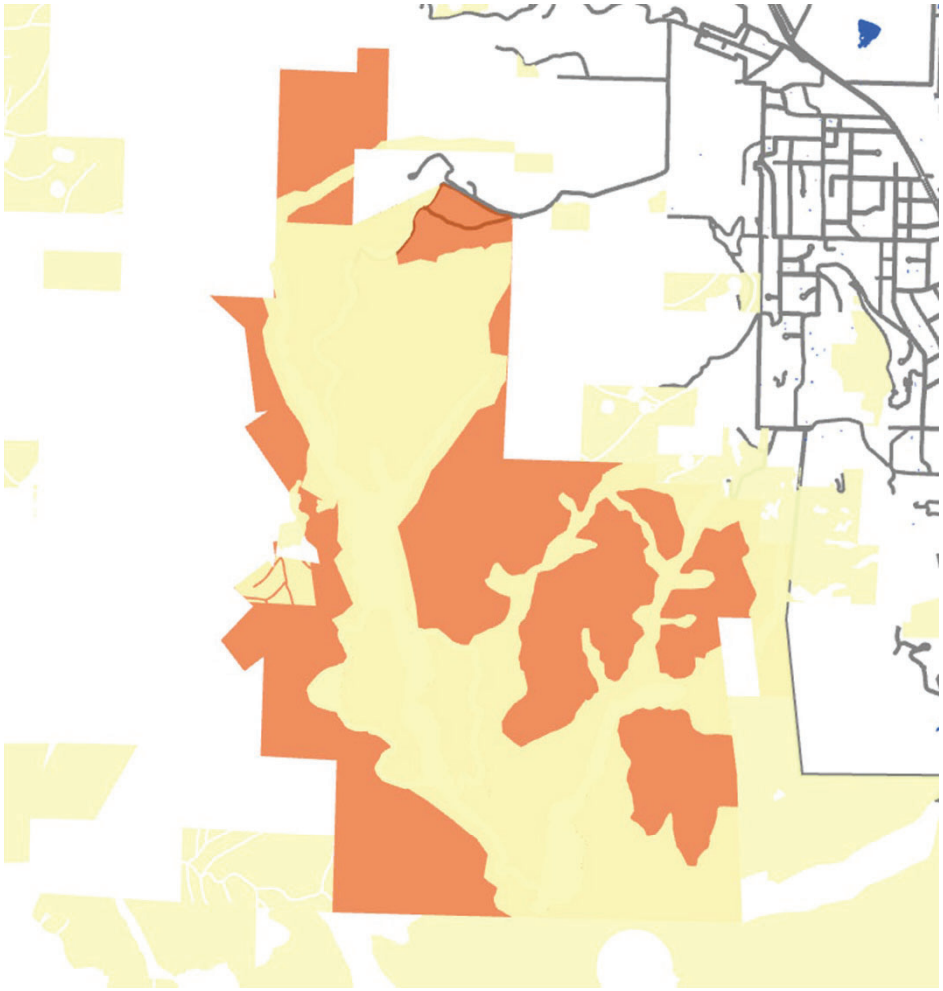


Forest Management

1,354 acres of fuels reduction on Madrone Ridge has occurred in the past decade through the Ashland Forest Resiliency Project.

We would continue maintenance & management through prescribed burning.

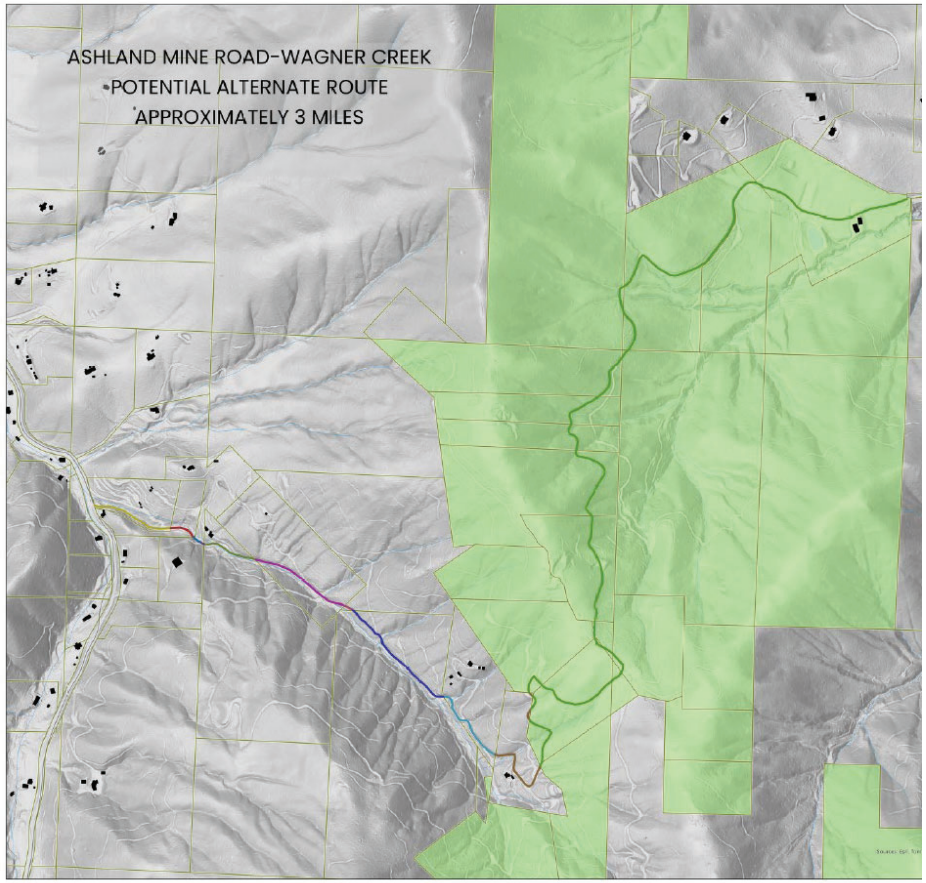
This would cost roughly $100K per year, which would likely come out of Wildfire Mitigation Fund. Potential partnerships could reduce funding needs.



Evacuation Access

The Madrone Ridge property was identified as a potential route for an alternate evacuation path for the Ashland Mine Road neighborhood.

The route would require access across 10 privately-owned properties, would cost ~$256K to build, and $5-7K annually to maintain. There are additional safety concerns for using such a route during a wildfire.



Additional Notes

The US Forest Legacy Program only allows property ownership by government jurisdictions. If the City acquires the Madrone Ridge property with this grant program, the City will not be able to transfer ownership to a private owner, a non-profit, or a tribe.

Next Steps

May 2026: Council decision to move forward with Master Planning

July 2026: (tentative) Approve grant applications and/or funding approach

Summer/Fall 2026: Approval of US Forest Legacy Program Grant Agreement

February 2027: Council decision to fund any remaining acquisition costs

QUESTIONS?

ASHLAND CITY COUNCIL
BUSINESS MEETING MINUTES
Tuesday, April 7, 2026

I. Business Meeting

Council Present: Mayor Graham; Councilors Sherrell, Dahle, Bloom, Kaplan, DuQuenne, and Hansen.
Staff Present:

Sabrina Cotta	City Manager
Jordan Rooklyn	Deputy City Manager
Johan Pietila	City Attorney
Carmel Zahran	Deputy City Attorney
Dan Moulin	Deputy Police Chief

Graham called the meeting to order at 6:00 p.m.

a. Land Acknowledgement**

DuQuenne read the land acknowledgement.

II. PLEDGE OF ALLEGIANCE

Dahle led the pledge of allegiance.

III. ROLL CALL

IV. MAYOR'S/ CHAIR OF THE COUNCIL ANNOUNCEMENT

Graham announced the budget committee appointment would be deferred to consolidate it with two upcoming term renewals at the next business meeting. Graham also noted that the Garfield Park agenda item would be split into two separate discussions.

a. *Arbor Day Proclamation*
b. *Independent Media Week*

Graham read both proclamations into the record.

V. APPROVAL OF MINUTES

a. *Minutes of the March 16, 2026 – Study Session Meeting*
b. *Minutes of the March 17, 2026 - Business Meeting*

Hansen moved to approve both the study session and business meeting minutes as presented from March 16 and March 17. Bloom seconded the motion.
Roll Call Vote: Sherrell, Dahle, Bloom, Kaplan, DuQuenne, and Hansen -Yes. Motion passed.

VI. CONSENT AGENDA

a. *Committee Member Appointments*
b. *b. Authorize City Manager to Submit a Heritage Tree Nomination for the Fremont Cottonwood at 380 Clay St*

Item b. was pulled from the Consent Agenda for separate discussion later in the meeting.

Bloom moved to approve the (remaining) consent agenda. Sherrell seconded the motion. Roll Call Vote: Sherrell, Dahle, Bloom, Kaplan, DuQuenne, and Hansen -Yes. Motion passed.

Graham acknowledged the newly appointed committee members: Deborah Costella to the Historic Preservation Advisory Committee; and Ro Henigson-Kann, and Dan Ruby to the Health and Human Services Advisory Committee.

VII. SPECIAL PRESENTATIONS

VIII. PUBLIC FORUM –

Six members of the public addressed the Council. Concern was raised over a recent civil rights lawsuit, arguing that the removal of a public comment speaker at a Council meeting was a violation of First Amendment rights. Another individual proposed a bridge-housing development at 2200 Ashland Street, suggesting a five- to six-story structure of 66 micro-units as a more efficient use of the site compared to workforce housing. Concern about restrictions on audience expressions at Council meetings was raised, and an announcement was made regarding a meeting at the Ashland Public Library to discuss the future of local healthcare following the Asante hospital closure. An individual requested that the Council hold a public forum on the health impacts of wireless radiation due to personal sensitivity. Lastly, there was a call to honor the historical gift from the Helman family to the community with a commitment to maintain City Hall at its current location.

IX. PUBLIC HEARING

X. ORDINANCES, RESOLUTIONS AND CONTRACTS

XI. UNFINISHED BUSINESS

a. Natural gas objectives and mechanism to achieve policy objectives

Cotta introduced the item as a follow-up to a prior Council request. Pietila and Zahran presented two structurally equivalent options—a franchise agreement and an ordinance—for governing Avista Utilities' use of the public right-of-way for natural gas service. Both documents contained identical terms, with minor updates including a new reporting requirement and a restoration-to-pre-disturbance-condition clause.

Staff clarified that the City is currently operating on a year-to-year extension of the prior franchise agreement, which can continue indefinitely with 180 days' notice required to terminate. From a legal standpoint, staff confirmed there is no practical difference between the two instruments in terms of enforceability. The key distinction is one of process and flexibility: an ordinance can be amended unilaterally by the Council through two readings, whereas a franchise agreement locks in terms for a defined period and requires negotiation with Avista to modify.

Council discussion centered on the trade-off between rate stability and policy flexibility, particularly related to the City's climate action goals and Avista's announced rate increases of approximately 14% in 2027 with additional annual increases through 2030. An amendment was proposed to reduce the

franchise agreement term from 10 years to 5 years, which failed 2-4. A motion to retain the status quo year-to-year arrangement also did not prevail. The Council ultimately approved execution of the franchise agreement as presented:

Dahle moved to direct the City Manager to execute a franchise agreement with the current language with Avista Utilities. The motion was seconded by DuQuenne.
Roll Call Vote: Sherrell, Bloom, Dahle, and DuQuenne – Yes. Hansen and Kaplan – No. Motion passed.

Graham called for a 10-minute recess from 6:35-7:35 PM

XII. NEW BUSINESS

a. Citizens' Budget Committee Appointment

This item will be considered at the next Council business meeting.

b. Requested Information on City Hall Repairs

Rooklyn presented informational responses to questions raised at a prior special meeting regarding the condition of City Hall. Staff noted that a rafter repair bid of $5,700 had been accepted and work was proceeding. All other cost estimates in the packet were based on inspection reports, not contractor bids, and were acknowledged as not reliably accurate.

Cotta confirmed that staff would not return to the building following the rafter repair alone, as the roof is actively leaking throughout and is beyond its useful life. The estimated roof replacement cost of $260,000 was noted as unverified and unbudgeted. Staff suggested the building's long-term fate should be considered through the upcoming facilities master planning process beginning in early May.

Council directed staff to obtain informal contractor estimates—at minimal or no cost—for roof repair options (both patching and full replacement) and HVAC, and to report back. It was noted that the rafter repair would need to be completed before a contractor could safely access the roof. Electrical work and pest control were confirmed as already underway in-house through staff.

c. End-of-Action Report on the Winter Shelter and Severe Weather Shelter

Cotta introduced Dan Cano as OHRA's Executive Director who presented findings from the 2025–26 winter shelter and severe weather shelter season operated at the 2200 Ashland Street property. The shelter offered 32 beds and prioritized night lawn guests. Approximately 22 individuals stayed consistently, with 25 transitioning into the OHRA shelter by the end of the season and approximately 8 individuals involuntarily removed.

Cano highlighted noticeable improvements in residents' stability and demeanor following the transition from congregate to non-congregate shelter settings. He identified the absence of structured daytime activity as a significant gap and shared OHRA's intention to develop a workforce program with approximately 75% of shelter residents employable and interested in work.

Council discussion touched on the importance of establishing measurable metrics, the value of non-congregate housing, the movement of the unhoused population across the region, and the role of community partnerships in connecting residents to employment. Cano noted OHRA's upcoming Community Cleanup Day on April 18, and Graham reminded the public that the ad hoc committee studying use of the 2200 Ashland Street site would hold an open house the following evening at 5:00 PM.

d. Garfield Park Concerns

Cotta reported an increase in neighborhood complaints related to individuals using Garfield Park during daytime hours following required departure of residents from the adjacent night lawn. Short-term measures already underway included increased police presence, use of unmarked patrol vehicles, and OHRA outreach.

Public Comment Open

Multiple community members addressed the Council, offering perspectives from adjacent residents, unhoused advocates, and service providers. Speakers broadly supported adjusting night lawn hours to reduce daytime displacement into the park, with several suggestions to allow residents to remain on the lawn during weekends and holidays. Concerns were raised about child safety, drug activity, and the adequacy of daytime storage at the park.

Public Comment Closed

Following public testimony, Council reached consensus on the following immediate operational changes, to be implemented the following Monday:

- **Night lawn hours adjusted from the current 7:00 AM departure to 10:00 AM departure and 3:00 PM return on weekdays.**
- **Weekends and federal holidays designated as full-access days, with no required departure.**

Moulin noted that under current practice, actual clearance of the lawn typically occurs 2–3 hours after the official departure time. Council indicated that the new 10:00 AM time should be treated as a genuine deadline.

Council also directed that the idea of engaging night lawn residents as volunteer park monitors be explored in partnership with OHRA, though not as a formal city program, and reached consensus to schedule a special meeting—to be held Monday or Wednesday evening of the following week—to take up Councilor Bloom's broader proposal for a structured city process to address long-term night lawn siting and management.

e. Item from Consent Agenda — Authorize City Manager to Submit a Heritage Tree Nomination for the Fremont Cottonwood at 380 Clay St

Council discussed the significance of the approximately 250-year-old Fremont Cottonwood located at 380 Clay Street and the long-standing community interest in its preservation. Supporters characterized the nomination as a meaningful acknowledgment that carries no additional legal

encumbrance. Dissenting views questioned the timing relative to ongoing housing development discussions on the site and expressed concern that the designation could complicate housing goals. The heritage tree designation was described as symbolic in nature; under City ordinance, a future property owner may request removal of the designation without restriction.

Kaplan moved to authorize the City Manager to submit a heritage tree nomination for the Fremont Cottonwood tree located at 380 Clay Street. The motion was seconded by Hansen.
Roll Call Vote: Sherrell, Bloom, Kaplan, and Hansen – Yes. Dahle and DuQuenne – No. Motion passed.

XIII. CITY MANAGER REPORT –

a. April Report

Cotta noted that staff is temporarily located at the Community Center, with walk-in service available from 1:00–4:00 PM and encouraged review of the full eight-page written report included in the packet.

b. Look Ahead

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

XV. ADJOURNMENT

The meeting was adjourned at 9:36 p.m.

_____ _____

Deputy City Manager Jordan Rooklyn Mayor Tonya Graham

DRAFT

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Tuesday, March 31, 2026 4:10:00 PM

[EXTERNAL SENDER]

City Council Public Comment Form

Public Comment
Use this form to submit public comment for City Council meetings. This form must be submitted by **10 a.m.** the day of the meeting to be on the record.

If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	ANDREA THERESA FELICITY GOOD
Meeting Date	4/7/2026
Email Address	[redacted]
Are you a City of Ashland resident?	No
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Formal Request for Accountability and Administrative Reset
Comments (Leave this section blank if you are requesting to speak electronically.)	Subject: Formal Request for Accountability and Administrative Reset To: Mayor Graham and Ashland City Council From: Andrea Good Date: April 7, 2026 RE: Formal Written Testimony for Public Record Dear Mayor Graham and Ashland City Councilors, Based on recent legal filings, engineering reports, and investigative journalism from the Chronicle and Ashland News, it

has become clear that the current administration is operating under a pattern of manufactured crisis and statutory failure. I am writing to formally support a public apology and a leadership reset for the following reasons:

1. The Manufactured Safety Crisis & Legal Gamble

The $6,000 Deception: City Hall was closed over a "split rafter" that engineers confirmed is a simple $5,000–$7,000 repair.

The Helman Deed "Pincer": By vacating the building rather than authorizing this minor repair, the Manager is risking the loss of the Plaza itself. The March 27th response from the Helman heirs (Case No. 24CV03851) proves that the City is gambling with the Automatic Reversion of the property back to the heirs by attempting to prove "impossibility" of use.

Inflated Narratives: Publicly claiming a $10M repair cost to justify abandonment, while engineering reports show "immediate concerns" total only $516k.

2. Unauthorized Takeover of Public Assets

The "Emergency" of Her Own Making: After overseeing two years of avoidable delays—including the "door issues" that kept the Community Center shuttered—the Manager used the resulting vacancy as an excuse to seize the building for offices.

Charter Bypass: Relocating staff without the required Council vote or public hearing violated the spirit of the City Charter and necessitated the rare 5-1 Council vote on March 27th to "ban" the move.

3. Failure of Budgetary & Ethical Oversight

Statutory Violations: The city is currently operating under a budget that lacks the legally required "legal effect" motions in public minutes (ORS 294.453), leaving the city’s spending authority unverified.

Unauthorized Fund Shifting: Overseeing a culture where payroll dollars were allegedly diverted to materials and services in violation of the State Local Budgeting Manual.

Ethics Breach: Failing to uphold ICMA Tenet 9, which mandates providing "honest and complete information" to the community.

4. Gross Inefficiency & The "Talent Warning"

The Talent Gateway Fiasco: We have seen where this lack of oversight leads. Ashland is currently mirroring the same

	administrative overreach that led to the $7M collapse in Talent. Ignoring Public Partnerships: Exploring expensive private rentals while overlooking existing partnerships—such as vacant space at SOU—prioritizes administrative convenience over fiscal reality. The Bottom Line: When administrative convenience is prioritized over statutory law, the "ownership" of our city becomes an illusion. To protect the Plaza, the budget, and the public trust, Ashland requires a leadership reset and a return to transparent, conscientious governance. Respectfully, Andrea Good Resident of the Rogue Valley ZIP Code 97520
Upload a file or image	*Field not completed.*

Email not displaying correctly? View it in your browser.

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Monday, April 06, 2026 9:44:23 AM

[EXTERNAL SENDER]

City Council Public Comment Form

Public Comment
Use this form to submit public comment for City Council meetings. This form must be submitted by **10 a.m.** the day of the meeting to be on the record.

If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Marni Owens
Meeting Date	04/07/2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Garfield Park
Comments (Leave this section blank if you are requesting to speak electronically.)	Heath concerns with hypodermic needles in the grass.
Upload a file or image	Garfield Park - Members of the Ashland City Council.docx

Email not displaying correctly? View it in your browser.

Dear Members of the Ashland City Council,

I am writing to express serious concerns regarding the current safety and public health conditions at Garfield Park. This park has long been a cherished space for families in our community—a place for children's birthday parties, safe outdoor play, and gathering during the summer months. Unfortunately, recent changes in the surrounding environment have significantly impacted its safety and usability.

Over the past year, conditions at and around the park have raised alarming concerns. During our last visit to the splash pad area, I discovered two hypodermic needles in the grass. This presents an immediate and unacceptable health risk, especially considering that children frequently run barefoot between the water features and surrounding lawn areas, like my children were. The presence of hazardous materials such as needles creates a dangerous and negligent situation in a space intended for children and families.

In addition to these health risks, there have been direct safety concerns. On a prior visit, a homeless individual followed my daughter into the girls' restroom. This incident was deeply unsettling and highlights the vulnerability of children in this environment. While I recognize the importance of addressing homelessness with compassion, the current proximity of temporary overnight accommodations ("night lawn") to a family-centered park is creating unsafe conditions.

Garfield Park should be a safe, welcoming environment for children and families. The current situation—combining overnight lawn, potential substance use, and a children's play area—poses significant risks that should not be overlooked or combined in close proximity.

I respectfully urge the City Council to take immediate action by relocating the temporary overnight camping area to a designated location that is separate from spaces intended for children and families. Additionally, increased safety measures, regular maintenance, and monitoring of the park are critical to restoring community trust and ensuring public safety.

This is not simply a matter of preference—it is a matter of protecting the health and safety of our children and preserving the integrity of one of Ashland's valued community spaces.

Thank you for your time and attention to this urgent matter.

Sincerely,

Marni Owens

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Thursday, March 19, 2026 5:00:01 PM

[EXTERNAL SENDER]

City Council Public Comment Form

Public Comment
Use this form to submit public comment for City Council meetings. This form must be submitted by **10 a.m.** the day of the meeting to be on the record.

If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Paul W
Meeting Date	2/17/25
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Housing
Comments (Leave this section blank if you are requesting to speak electronically.)	The golf course is a financial drop for the city. Housing is all about diagnostics. The golf course is set up for water or sewer potential. It can be made linear easily. It could provide space for hundreds of little houses. The working class poor or worker bee's of the city have seen rising prices from rent to retail in a constant onslaught. Three are 3 golf courses within 15 minutes of the city. The continuation of a golf course here is sheer lunacy or elitism. Whichever you prefer. I think that something major must be done before it is to late or to expensive. Thankyou....
Upload a file or image	*Field not completed.*

BRENT THOMPSON

[redacted]

age 6
uesday, January 19, 1993
he Daily Tidings
shland, Oregon

Cities should keep city halls downtown

As cities grow, city workers are constantly coping with inadequate space for the increased workload. The original City Hall is invariably located downtown, but parking shortages, older facilities, and expensive rents or high purchase costs for additional space tempt city officials to move City Hall to the comparative wide open spaces of fringe areas.

On paper the whole idea always looks good or it wouldn't be seriously considered, and often the plan not only receives serious consideration, but approval as well. This is unfortunate for a number of reasons.

All across America city cores have fallen into a state of neglect as shopping has gone to malls. No offense intended, but the degree of decline can be determined by the number of store fronts on "Main Street" that house churches or other non-profit organizations. If these organizations can afford "Main Street" rents, rents are low, indicating that commerce is indeed dead.

When a city government abandons the city center, it is an indication that government refuses to cope with the problems that any centrally located business has to cope with. After departing, city government officials lose empathy for the problems centrally located businesses face. The lack of empathy eventually hurts these businesses, because ordinances and regulations are proposed that are hostile to the central business community or measures are overlooked that might help the business community.

Of course, businesses can fight proposed ordinances they don't like, and they can propose ordinances they do want, but it is better for business when city government employees work in a similar environment as business owners and employees.

Central businesses have to cope with social problems such as crime and street people, smaller stores, traffic, parking shortages, deteriorating infrastructure, older buildings, parcel fragmentation, and the sometimes poor management or upkeep by adjacent property owners. Matters are simpler for businesses in malls because of the consistent managment in them, and the best way for city decision makers to appreciate this is for city halls to stay where they started, right in the middle of town.

This isn't to say that some city functions such as street repair, street cleaning, or snow removal shouldn't be headquartered on city fringes where there are fewer conflicts for those operations and more space, only that department heads and the main city offices should remain in the town center.

Although it may not be obvious, government is a part of culture. While some people may find meetings boring, many do not, as evidenced by the quantity of people who watch city government on TV, where it is offered. People like to see how decisions are reached, how problems are solved and who it is that makes the decisions. The whole governmental process is a major part of a civilization's culture. To keep the core of a city vital, all types of culture must be encouraged there, not just the arts.

City halls in their central locations can house historical displays that link people to the heritage of the city. They can serve as information centers. People want to be able to wander into their city hall to look around and to ask questions. People don't do that when they have to make a special trip to some non-central location, and that inconvenience can hurt the retention of a community feeling.

Maintaining a city government in the core makes government more accessible to the people. People see city officials around town, which makes them seem more approachable. The probability of chance encounters increases, making casual conversation easier. When government moves from the core area, officials aren't as visible or approachable, and citizens will find it difficult to just drop into City Hall to ask questions or give input into city matters.

Accessibility and familiarity lessen alienation of the people from government, thereby enhancing communication. Communication is important for government to best represent the people, and the most accepted City projects are those where many people have been drawn into the deliberations. Keeping City Hall in an accessible location helps do that.

A centrally located city workforce also will tend to patronize nearby businesses, thus increasing the probability of their success. They are able to get to these businesses without driving, another benefit.

For all these reasons city halls should stay downtown. Additional space can be found when needed. City leaders just have to do the same thing a sucessful centrally located business would have to do: buy or lease space and adapt it to met organizational needs.

Most of all, though what can look like a cost-savings measure can prove to be very expensive if the result of moving City Hall is a major contribution to the demise of a city's central area and the alienation of people by removing government farther away. No municipality should risk that. Certainly not Ashland.

EDITORIALS: Opinions expressed in the above column are those of Publisher Michael O'Brien, Managing Editor Ken O'Toole and contributing editorial writer Brent Thompson.

Keep government in heart & soul of the city

1993

COMMENTARY

BRENT THOMPSON

Visioning documents such as the downtown plan and comprehensive plan should dictate what is in capital budgeting documents, but in the case of the proposed new City Hall, certain elected and appointed city officials are letting budgeting documents dictate the vision.

The problem is that alternatives to moving City Hall from the downtown were never discussed once the downtown plan was written in the late 1980s. Never were the capital budgeting documents brought in line with the vision that emerged from the hearings on the downtown plan.

The downtown plan was formulated with staff and planning commission input and by a great amount of public testimony in meetings held by the planning commission and the citizens planning advisory committee. The emerging drafts contained strong wording as to the desirablity of keeping our City Hall in the downtown.

A problem emerged when the city administrator intervened and seems to have made the planning director, John Fregonese, change wording to reflect components of the Capital Improvement Plan.

That was wrong because the budget should follow the visioning documents. The planning commission in that instance voted 8-1 to reinsert stronger language calling for the retention of a downtown City Hall. But once the downtown plan went to the city council for adoption, that visioning wording was re-altered and somewhat weaker language was included in the final draft.

The idea of moving our City Hall was a remnant the 1970s, which planners now recognize (along with the 1960s) as the low point in American city planning. The downtown visioning done in the 1980s reflected the need of cities to focus on downtowns, if their downtowns were ever to comply with this neo-traditional vision.

The alternatives for adding office space and keeping the City Hall downtown are numerous. It is time for them to be discussed, and it is time to dump the concept of removing city functions from the downtown. Failure to do so means we are abandoning the downtown to tourism. It is also time for a police substation to be placed back downtown.

A partial listing of alternatives for expanding city offices in a downtown location follows.

- The city can buy or lease an existing building and renovate it to meet the present and future city office needs.
- The city could build above any one of six city public parking lots. In a small first floor area of 800-1,000 square feet could be a reception area, much needed public bathrooms, a public information area, a stairway, and an elevator. Offices would be on the second and third floors. Any parking allocated for city business during the day could be for public use at night and on weekends.

The following are possibilities for building over four city parking lots. The Water Street parking could accommodate the City Hall above. The offices could have access from the Lithia Way overpass, and they could straddle Water Street. This site offers an opportunity for architectural creativity and pedestrian accessibility.

- The Pioneer Street and Lithia Way parking lot is probably the easiest site to work with because of its size and relative flatness. Constructing a three-story building with a small first floor area would be a relatively easy project.
- The Shakespeare parking lot is a possibility. Because of the slope there are some challenges, but the area is definitely large enough.
- Going back to options with privately owned property, the Mark Antony Hotel could be an alternative for a long term lease because that building needs more extensive use. As one non-daily publication noted, the owner of the Mark Antony offered to permit construction above the parking lot for a City Hall, but our officials indicated no interest.
- The Old Armory is another possibility. Space could be leased there at a reasonable cost.
- But probably the best alternative is to expand the existing City Hall. Where it is currently one story, it could be expanded to three stories and more space could be added by building out over the public stairway and alley towards the Abraham Lincoln statue, It is probably possible to put a third story with dormers into a new roof line over the complete existing structure.

The exterior of our existing City Hall structure has been modified at least twice so the issue here would not be a loss of architectural integrity, but how to add on compatibly.

With any alternatives in the downtown, costs might exceed costs of building by the police station, but staff travel time and transportation costs would be less. Public vehicle trips would be less, and we wouldn't be faced with the cost of increased public alienation by further removing government from residents and business owners.

What is important is that when city officials value tradition, want a viable downtown for residents, and desire good communication with constituents, they don't remove government from the heart and soul of a city.

If it were essential for government to be in the geographical center of jurisdictions, as some suggest, the Feds would have packed up for Nebraska decades ago and Burns would be the capital of Oregon.

If for some reason a new city office building is built out of the downtown, the functions that are moved will be replaced downtown by future city leaders following community vision, not old budgeting documents remaining from the 1970s.

Let's avoid that. Let's choose an alternative in the downtown for City Hall expansion, now.

Brent Thompson is an Ashland building renovator and a member of the Planning Commission since 1985.

City Hall is moving! — Unless

MONDAY 26 JULY 93

COMMENT

BRENT THOMPSON

With the departure of department heads and staffs from the offices of Planning, Building, Energy Conservation, Water Conservation, Engineering and Public Works to a peripheral location, the downtown City Hall would be functionally gutted.

While there would still ostensibly be a City Hall downtown, any reference to it thereafter would need quotation marks. Further, the proposed building ($675,000 worth) is the first of two phases. The second phase would cost $340,000 and would remove more functions from the downtown. As the first part of a slinky goes, the second follows, so it would be with City Hall.

What would likely remain in the city core would be the "city functions" of public bathrooms for our visitors and a visitors' information or history center.

There would be the mayor's office until it became apparent that all the action is out on East Main. Then our elected Mayor would have to move or be left out. But then elected people only get in the way of "real government" anyway.

The city administrator's office would probably go in the second phase, although a symbolic office might be left downtown.

There might also be a police substation to deal with our increased problems since we would have abandoned the downtown to outsiders.

There would be a utility payment center and maybe a few other symbols of what used to be the nerve center of Ashland. But in reality, government would be gone.

The proposed 10,000 square feet of building space costing $1 million, if it really is needed, should be built or acquired in the core area. This issue is important because the removal of City Hall from the downtown would likely mean the death of intimacy and good communication between city officals and Ashland residents. City officials would become invisible and less approachable, rather than maintaining their current prominence and accessibility. This translates to a future alienation of the people from city government.

City officials would lose their empathy for the problems of downtown businesses once they no longer personally deal with these problems. This translates to a future alienation of downtown business from city government.

If residents and business owners permit the removal of City Hall from the downtown, Ashland would join the ranks of any number of cities that lost their soul, thus retaining only a veneer of what had made them special or great. This would be a tragedy for Ashland. The idea of moving the City Hall is left over from the 1960s and 1970s which planning experts now recognize as the low point of American city design.

A quantifiable argument can be made for the removal of the City Hall out of the downtown or the concept wouldn't have gotten this far. A quantifiable case can also be made for keeping City Hall downtown, particularly when the dual use potential of downtown facilities is considered. As is often the case, the numbers can be manipulated either way rendering cost-benefit arguments worthless.

But what is not so easily manipulated is vision of the people regarding the future of Ashland. That is where the people matter. The Capital Improvements Plan makes reference to goals of improving the working conditions for city workers or of providing for space needs into the 21st century. These goals are important, but they can be achieved downtown. This document leaves out the most important goals of maintaining the accessibility of government by the people and of maintaining traditions that bind our social fabric together.

That is where our Comprehensive and Downtown Plans come in, and any move of City Hall out of the downtown would violate the spirit of these visioning documents.

One problem here is that the city administrator may have bargained away any City Council opposition over the years to the new "government center." That is, unless the public refuses to accept the move.

Unfortunately, we don't get real input from city staff on such proposals. Department heads, even if they might be opposed, would be mute to any move. There is a military type chain of command in city government, and it is not appropriate to undermine the chief administrator's position on any issue. However, former community development director John Fregonese did passionately disagree with city administrator Brian Almquist on this.

What we need now, and I mean right now, is a mass outpouring of sentiment demanding that the City Council direct the city administrator to seek space in the city core where the expansion should occur. The city already owns enough land downtown to get the job done, but the option of purchasing an exisitng building shouldn't be ignored.

Ripping the guts of government out of the downtown is unacceptable. Having generations of city officials hiding behind the Council Chambers on East Main out of touch with the people is equally unacceptable. We don't want to follow the lead of other American cities that have turned their backs on their downtowns, but we are perilously close to doing exactly that.

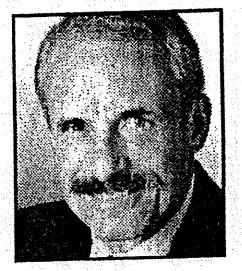
The city administrator is an exceptionally capable person, but he is exceptionally wrong on this one issue. Also, is this where we need to allocate $1 million right now?

Brent Thompson has been a member of the Ashland Planning Commission since 1985.

Daily Tidings 19 January 94

Overcome bad planning, and keep government downtown

Brent Thompson



Twenty years ago, the city council decided more space was needed for vehicle and equipment storage and some other city functions. The council chose to build on a site a mile from the downtown. In addition to moving the "Corporation Yard," as they are called, the plan included the relocation of the police station, the Municipal Court, and the civic meeting hall.

The move of the Corporation Yard was probably not going to create a problem for the future of the city, but the decision to move other functions was.

In fact, this same prior council planned for almost all city functions to eventually be moved from the downtown. This compounded the misfortune of the original decision, because the financial commitment and the controversy created by that bad decision have been difficult to end.

This emphasizes the fact that bad planning, whether it be moving government out of a downtown, encouraging sprawl with premature annexations, or planning only for automobiles, is lamentably difficult to correct.

In other cities where government was moved from the traditional downtown, planners and city administrators learned it was a mistake, because the removal of government resulted in irrevocable harm to that traditional downtown and to the community in general. But this knowledge somehow still fails to affect the decision making of current elected and appointed Ashland city officials.

Rather than acknowledge and correct the bad planning by abandoning plans to move more government from the downtown and move the meeting hall, the computer, specialists, and at least a police substation back downtown, capital budgeting plans in the 1980s included allocations to build a 10,000-square-foot building to house additional functions a mile from downtown.

The application went to the Planning Commission in the fall of 1993, and only a vigorous citizen campaign prevented the construction of the ill-advised 10,000-square-foot building. The council agreed to postpone the project after considerable citizen protest and strong leadership by our mayor against the application. But the council stopped the project — not because they had a clear vision of how to integrate government expansion into the downtown, but because they feared citizen backlash. Still in the minds of most of the council was that it was OK to build something else on East Main for city government.

Thus, the tendency in Ashland has been for both elected and appointed city officials to compound a prior mistake with further studies and plans to move more city functions from downtown to the East Main site.

But now, there is an additional variable that did not affect the decision making in the 1970s, the 1980s, or in 1993. That variable is that the Fire Department now needs more space due to the absorption of the ambulance service. This offers the city an opportunity to combine the fire department and city offices into one structure, resulting in great cost savings from the combined project.

However, first, the latest effort to move more government out of the downtown must be denied or abandoned. The new application is to build a 7,800-square-foot building for Public Works, the fire chief, and computer specialists. A building this size normally would house 29 people, but it is supposedly being built for 10.

But why would any city consider locating the fire chief anywhere but in the fire station?

Although nothing more should be built at the East Main location, these few people do not need 7,800 square feet. This structure is larger than the existing City Hall, and the layout offers the potential for expanding the building. Thus, again, this application appears to be an attempt to move by increments city government from the downtown.

Fortunately, the application is in violation of Ashland's Transportation Plan, its Downtown Plan, its Site Design Guidelines, and its Comprehensive Plan. If that isn't enough, it also conflicts with the vision of the governor's office, Livable Oregon (formerly the Oregon Downtown Association), and 1,000 Friends of Oregon.

The application never should have been submitted, and it will be opposed by citizens who favor saving tax dollars by combining projects and who favor planning that enhances our traditional downtown and a sense of community.

Brent Thompson served on the Ashland Planning Commission for 10 years and the Ashland City Council for two. He is also a former president of the Southern Oregon Land Conservancy and the Jackson County Citizens League.

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Monday, April 06, 2026 5:21:35 PM

[EXTERNAL SENDER]

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If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Richard Barth
Meeting Date	April 7, 2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Natural gas objectives and mechanism to achieve policy objectives
Comments (Leave this section blank if you are requesting to speak electronically.)	During a prior council meeting there was discussion about articulating the objectives for the Avista franchise renewal prior to discussing the mechanism to be used (ordinance vs. franchise contract). The council packet for the present meeting seems to present only the two mechanism options and contains nothing about objectives. Some objectives council may want to consider include long term affordability, health and climate impacts, keeping energy dollars local, and decommissioning the gas network. Such objectives may want to take into account the following

	context: low and moderate income residents are typically renters renters typically pay utility bills, not the landlord; this results in a split incentive; landlords are incentivized to minimize capital costs such as space and water heating equipment as well as stoves; renters would like to minimize operating costs such as utility bills and medical costs such as child asthma there is a trend towards electrification; in order to achieve the city's climate goals required by ordinance this trend must accelerate as electrification occurs there is risk that the LMI community will be left behind as fewer customers are paying to maintain the gas network those still using it will necessarily pay more other cities, e.g. Palo Alto, are already contemplating decommissioning their gas network merely renewing the existing gas franchise terms, whether by franchise or ordinance, will lock in the status quo rather than providing the flexibility needed to deal with the changed situation a larger portion of energy $ paid to the city electric utility stay in the community, including in the city general fund, compared to those paid to Avista staff needs to follow up with the same people who advised them on the carbon pollution fee to understand how the gas renewal terms could change in support of the above listed goals staff needs to find out what cities such as Palo Alto are contemplating to decommission the gas network A recent article related to this agenda item can be found at https://www.canarymedia.com/articles/electrification/palo-alto-kids-induction-stoves
Upload a file or image	*Field not completed.*

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To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Monday, April 06, 2026 1:21:01 PM

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Full Name	Mark Brouillard
Meeting Date	04/07/2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Concerns regarding public safety and shelter managed by OHRA
Comments (Leave this section blank if you are requesting to speak electronically.)	To the Ashland City Council, I am writing as a concerned resident regarding the current state of homelessness management in Ashland, particularly as it relates to public safety, sanitation, and the impact on surrounding neighborhoods and businesses. When the “Night lawn” was introduced, many of us understood it to be a temporary, managed solution intended to help people transition out of homelessness. Instead, what we are now seeing in and around Garfield Park and nearby areas is a deterioration of basic public standards; from human waste to open drug use

and discarded paraphernalia, and ongoing unsafe conditions to the point I will no longer use or be in or around Garfield Park. How much did the city spend on the splash pad that I will not allow anyone in our family to use?

The situation near 2200 Ashland Street is especially troubling. Businesses and neighboring residents are dealing with public defecation, discarded syringes, drug use, and even deliberate disabling of exterior lighting to conceal activity. This is not a sustainable or acceptable outcome for any community. I can only imagine the strain this places on nearby businesses such as The Oil Stop, Sherwin-Williams and others in the area.

We are also seeing similar issues elsewhere: individuals passed out along the Takelma Way bike path spur, reports of overdoses near the OHRA/Super 8 area, and increasingly aggressive behavior near entrances to Albertsons or in the parking lot of Tolman Creek Plaza. These are not isolated incidents; they point to a broader failure in how current policies are being implemented and managed.

I want to be clear: compassion and accountability must go hand in hand. What we have now appears to be neither effective treatment nor effective enforcement. Instead, it feels like a cycle of temporary fixes, committees, and discussions that do not meaningfully improve conditions for those experiencing homelessness or for the broader community.

Ashland is a town of roughly 20,000 people. The current situation appears to be significantly impacting quality of life for a large portion of residents and businesses, while failing to deliver real, lasting solutions for those in need.

I urge the Council to:
• Reassess the effectiveness and management of current shelter and service locations
• Enforce basic public health and safety standards consistently
• Prioritize treatment-based solutions that address substance abuse and mental health
• Evaluate the impacts of facilities managed by OHRA on surrounding neighborhoods
• Refocus time and resources on solutions that balance compassion with accountability

Additionally, before expanding to larger or new sites, it is critical to demonstrate that the City can effectively manage and maintain the areas and programs already in place.

Lastly, I urge the City to be more transparent and direct in how incidents are described in public reporting. Terms like “offensive littering” obscure the reality of what is occurring. If the issue is

	public defecation, it should be reported as such. Clear, honest language matters, and it helps the public fully understand the conditions on the ground. This issue is not about a lack of compassion, it is about the need for results, responsibility, and restoring a baseline level of safety and cleanliness for everyone in Ashland. Thank you for your time and consideration.
Upload a file or image	*Field not completed.*

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From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Monday, April 06, 2026 12:51:35 PM

[EXTERNAL SENDER]

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If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Tessa Mae Alleman Harnen
Meeting Date	April 7, 2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Usage of Garfield Park
Comments (Leave this section blank if you are requesting to speak electronically.)	A new solution must be made that prioritizes safety and equal access to the park for all Ashland citizens, unhoused or otherwise. It is unfair for everyone involved that Garfield Park has become a place of daily caution. It is unfair that open drug usage and severe mental illness has scared away families from using the park. We cannot, in good faith, allow any one group to capitalize on using a public space at any other group's expense, especially when safety has become such a strong concern. Please do something to conserve all public spaces in Ashland so that they are usable by all Ashland citizens in good faith.
Upload a file or image	*Field not completed.*

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Tuesday, April 07, 2026 7:33:56 AM

[EXTERNAL SENDER]

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If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Dave Hysom
Meeting Date	Aprol 7, 2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	City Manager's Report
Comments (Leave this section blank if you are requesting to speak electronically.)	During a recent council mtg, there was discussion about moving the City Manager's Report to the beginning of the meeting, and, as I recall, there was agreement on that point. Yet, in today's agenda packet, it remains at the end of the mtg. My question: what's up with that? Why has it not been moved? It should only take a couple of mouse clicks to fix the agenda. I urge you, the council, to set clear guidance on this matter.
Upload a file or image	*Field not completed.*

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Saturday, April 04, 2026 8:23:21 AM

[EXTERNAL SENDER]

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If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Christine Lawton
Meeting Date	April 7, 2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Garfield Park
Comments (Leave this section blank if you are requesting to speak electronically.)	I am new to the area and would be interested in learning more about recent Garfield Park concerns.
Upload a file or image	*Field not completed.*

Email not displaying correctly? View it in your browser.

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Sunday, April 05, 2026 4:28:19 PM

[EXTERNAL SENDER]

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If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Gordon longhurst
Meeting Date	April 7
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Garfield Park
Comments (Leave this section blank if you are requesting to speak electronically.)	This is an unacceptable situation. Garfield Park is a magnet and a treasure for kids in warm weather A group of adult loiterers, with their dogs and who knows what else, are not a suitable fixture in the park. I have suggested in the past that an area over by the volleyball court be designated for their use, perhaps by clearly marking, even fencing, all the children's play areas for children and their parents only. I gladly pay taxes to maintain our wonderful parks, but not to provide a "hangout" for adults who need to find some other option.
	Field not completed.

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Monday, April 06, 2026 10:23:31 PM

[EXTERNAL SENDER]

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Full Name	Rush Emmet Manbert
Meeting Date	April 7 2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Concerns at Garfield Park
Comments (Leave this section blank if you are requesting to speak electronically.)	The closest park to our home, one our son asks to visit frequently, does not feel safe any longer. We used to swing and play often at the playground, but the frequent cigarette smoke, intense language, and dog barking casts a pall over the playground. Their chosen location is so close to the playground that it's impossible to ignore their activities. The last time I visited with my son, we overheard a charged discussion about child rape and pedophilia, watched chaotic dog squabbles, and asked a woman if she could kindly enjoy her cigarette outside the parks boundary as her smoke wafted downwind towards us on the playground, 15 feet away.

	The park is for everyone, yes. -But a park also has an intended use: recreation. That’s not what it’s being used for now. I encourage the council to make this a priority. The current management plan has effectively killed one of the town’s best parks. Change is needed - and please, quickly
Upload a file or image	*Field not completed.*

Email not displaying correctly? View it in your browser.

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Sunday, April 05, 2026 11:09:11 AM

[EXTERNAL SENDER]

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Full Name	Tom Muller
Meeting Date	04/07/2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Garfield Park Unhoused and Related Challenges
Comments (Leave this section blank if you are requesting to speak electronically.)	As a resident of Garfield Street, I have watched with growing concern as our shared park facilities have become overwhelmingly concentrated with our unhoused neighbors, through no fault of their own. I genuinely feel for those in crisis, and I believe every person deserves dignity and access to safe, comfortable spaces. That is precisely why this situation is so troubling for everyone involved. Concentrating all daytime and overnight services in a single neighborhood is not a compassionate solution — it is an overburdened one. It is not fair to the unhoused individuals who deserve better-distributed resources, and it is not fair to the

	broader Garfield Street community. Families have stopped using the playground. Long-time park-goers feel unwelcome in a space that belongs to all of us. This is not a small inconvenience — it is a fundamental change to the fabric of our neighborhood. I urge the city to take meaningful action: distribute night lawn and daytime park programs across multiple locations throughout town, rotating access across different areas so that no single neighborhood bears the full weight of this shared responsibility. A truly compassionate and equitable approach demands no less. Our unhoused neighbors deserve better support — and so does every community in this city.
Upload a file or image	*Field not completed.*

Email not displaying correctly? View it in your browser.

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Tuesday, April 07, 2026 3:27:03 AM

[EXTERNAL SENDER]

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Full Name	Ruth R Nelson-Moore
Meeting Date	4-7-26
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Garfield park
Comments (Leave this section blank if you are requesting to speak electronically.)	Greetings, I would like to support the houseless population in having a place they can reside 24/7, rather than only at night. Furthermore as a resident and mother I hope the camp can be moved further away from Garfield park. I hope to be able to come to the park this summer with my daughter however the benches and tables are usually occupied by houseless folks and their belongings. I believe they have a right to exist and feel safe just like families in Ashland. The city of Ashland should invest in storage cabinets if people want to be able to store their possessions. Additionally, if people want to be able to stay where they slept during the day, they should be able to or at least be able to leave their items

	securely to go get their needs met around town. Please address this issue and also consider how close a camp is to a park so that the park does not become the hangout. Thankyou.
Upload a file or image	*Field not completed.*

Email not displaying correctly? View it in your browser.

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Saturday, April 04, 2026 12:07:55 PM

[EXTERNAL SENDER]

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If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Lynne Redford
Meeting Date	04/07/26
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Issues with Garfield Park...
Comments (Leave this section blank if you are requesting to speak electronically.)	As an Ashland resident, thank you for letting me comment. So many of us are fed up by the issues caused by the homeless at Garfield Park and at the Dusk to Dawn Night Lawn. How many of the folks who are home free in both places have turned down outreach for help or a place to sleep and treatment because they don’t want to follow the rules and prefer to be homefree? That's their right, but the other community members also have rights. That includes all of us following the laws and the rules that protect us all. That includes being responsible for your own actions, taking the penalties if you aren't, and being a respectful member of this place we all call home.

	Ashland is an incredible, compassionate town and many of us volunteer with those struggling but we can't compassionate this issue away. Garfield Park is for people to enjoy--not to sleep in, hang out all day under the gazebo, smoke, bring their out-of-control dogs on ropes and their belongings, scream at each other and visitors, drink, leave drug paraphernalia and destroy the bathrooms. Many kids ride their bikes by going to and from Walker Elementary, Ashland Middle, and John Muir. They used to stop at Garfield Park but now it's not safe. You certainly won't want to take your young children to the splash pad now or use the restrooms. Drug paraphernalia on the grass or in the bathrooms? Sometimes yes. The Dawn to Dusk area was a great idea but people now never leave. I have had police business and witnessed people screaming at each other and running to the police station to help them sort out their issues over who might have moved their belongings. Volunteers were requested to help them clean up their stuff and move out for the day when time is up. Ridiculous. The police are already stretched thin and taxpayers are fed up trying to fund more help for these issues. I am for expanding the exclusion zone to also encompass Garfield Park and the Dawn to Dusk lawn. Sadly, there now need to be signs up with no loitering, violators will be cited. Three times cited and you're out of the area permanently. No "30 days and you can return". Gone from the area. Everyone must take responsibility for their own actions. Get help and don't ruin this beautiful area for the rest of us. Thank you.
Upload a file or image	*Field not completed.*

Email not displaying correctly? View it in your browser.

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Tuesday, April 07, 2026 8:49:27 AM

[EXTERNAL SENDER]

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Full Name	Paloma Ronca
Meeting Date	04/07/2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Garfeild Park Concerns
Comments (Leave this section blank if you are requesting to speak electronically.)	Hello all. I am writing because I know that the city council is to discuss complaints and concerns regarding Garfeild Park. I live right next to the park and walk my dog around it at least twice a day. I am a young woman and am often walking by myself and I wanted to inform the city council members that I have never been made to feel unsafe by the unhoused folks that hang out there during the day. These people have the right to utilize our public spaces just like anyone else, even if other people find them annoying. I have never observed any unsafe or threatening behaviors, and I believe that I am in the majority. Everyone else that I have talked

	to feels the same way, even though there are a few loud members of our community who take issue with the folks that hang out in Garfeild park. Increasing police presence, putting up cameras, banning activities, and restricting access to our public spaces from people who don't fit into society as well is not just wrong, it does not help improve our communities. Instead of investing in policing garfeild park more, please consider setting up more low income housing and investing in communities instead of policing them. Sincerely, Paloma Ronca
Upload a file or image	*Field not completed.*

Email not displaying correctly? View it in your browser.

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2) State your name and speak clearly into the microphone

3) Limit your comments to the time allotted

4) Provide any written materials to the meeting Secretary

5) Speakers are solely responsible for the content of their statement

Date: 4/7/26

Name: (Please Print) Nadia

Ashland Resident:

☐ YES ☒ NO City: Talent

Agenda Topic/Item Number: D Garfield Park

Public Forum Topic (Non-agenda Item):

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Date: 4/7/2026

Name: (Please Print)

Brian Hellwig

Ashland Resident:

☑ YES ☐ NO City: _____

Agenda Topic/Item Number:

Garfield Park Concerns

Public Forum Topic (Non-agenda Item):

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3) Limit your comments to the time allotted

4) Provide any written materials to the meeting Secretary

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Date:

07APR26

Name: (Please Print)

CRYSTAL REDDING

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

Garfield Park

Public Forum Topic (Non-agenda Item):

Park

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Date:
4/7/2026

Name: (Please Print)
Paul Bingham

Ashland Resident:
[X] YES [ ] NO City: _____

Agenda Topic/Item Number:
XIII d. Garfiel Park Concerns

Public Forum Topic (Non-agenda Item):

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Date: 4/7/26

Name: (Please Print)

RICK VEZIE

Ashland Resident:

☑ YES ☐ NO City: _____

Agenda Topic/Item Number:

CITY HALL

Public Forum Topic (Non-agenda Item):

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Date: 7 Apr. 26

Name: (Please Print)

John Maurer

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

Public Forum Topic (Non-agenda Item):

Health care

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Date: April 7

Name: (Please Print) Julie Akins

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

Public Forum Topic (Non-agenda Item): ✓

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3) Limit your comments to the time allotted

4) Provide any written materials to the meeting Secretary

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Date:

4/7/26

Name: (Please Print)

ERIC NAVICKAS

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

Public Forum

Public Forum Topic (Non-agenda Item):

2200 ASHLAND ST.

Please respect the order of proceedings and strictly follow the directions of the presiding officer. Behavior or actions which are loud or disruptive are disrespectful and offenders will be requested to leave.

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Date: 4/7/26

Name: (Please Print) Heather M. Johnson

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number: Garfield Park

Public Forum Topic (Non-agenda Item):

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Date: 4/7/26

Name: (Please Print) Avram Sacks

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number: Garfield PK

Public Forum Topic (Non-agenda Item):

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Date: 4/7/26

Name: (Please Print) Karen Poth

Ashland Resident:

☑ YES ☐ NO City: _____

Agenda Topic/Item Number:

Public Forum Topic (Non-agenda Item): Fiber Optic/Wireless

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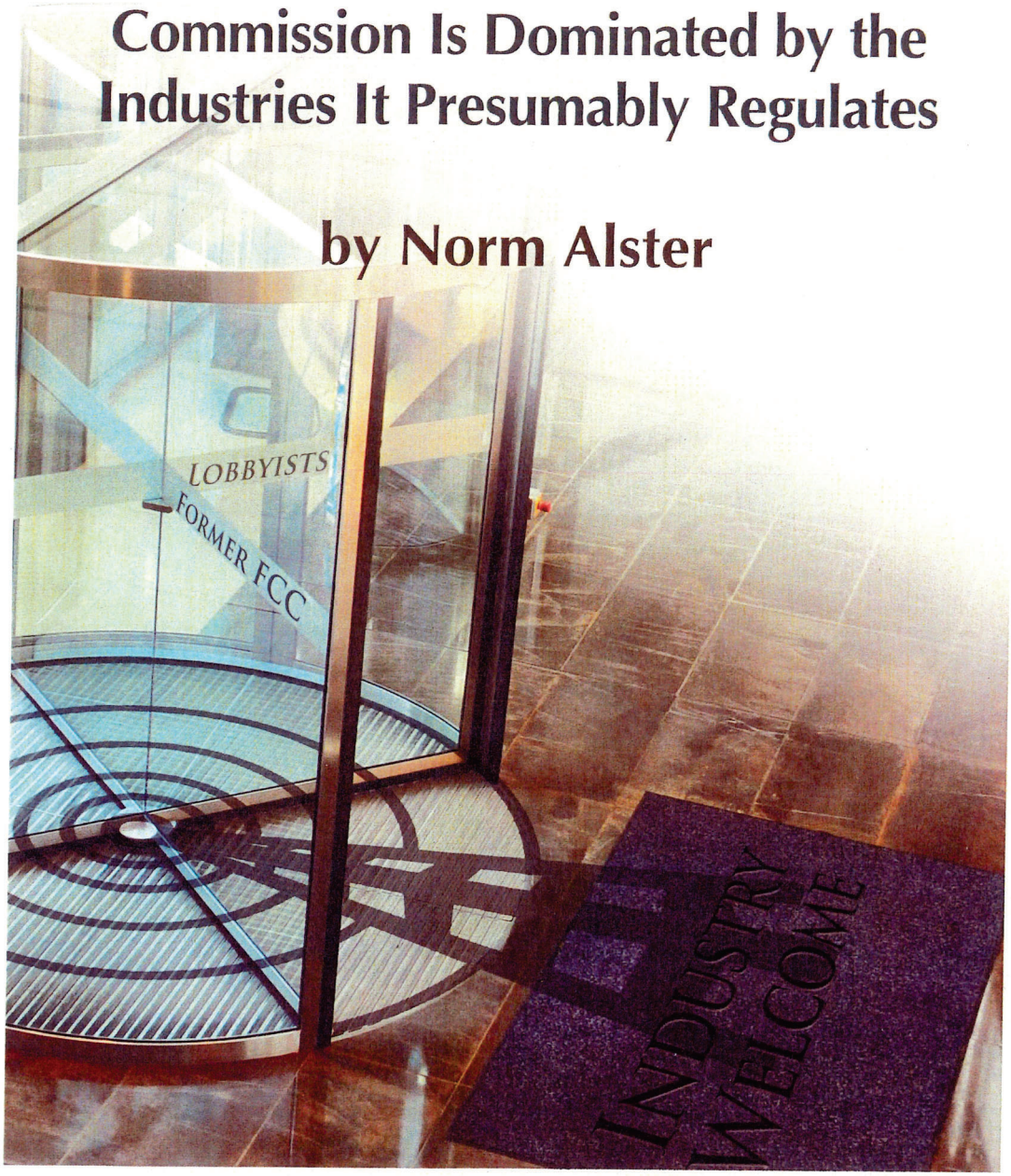
Karen Potts

Captured Agency:

How the Federal Communications Commission Is Dominated by the Industries It Presumably Regulates

by Norm Alster



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Captured Agency

How the Federal Communications Commission Is Dominated by the Industries It Presumably Regulates

By Norm Alster

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Appendix – Survey of Consumer Attitudes

Endnotes

Chapter One: The Corrupted Network

Renee Sharp seemed proud to discuss her spring 2014 meeting with the Federal Communications Commission.

As research director for the non-profit Environmental Working Group, Sharp doesn't get many chances to visit with the FCC. But on this occasion she was able to express her concerns that lax FCC standards on radiation from wireless technologies were especially hazardous for children.

The FCC, however, should have little trouble dismissing those concerns.

Arguing that current standards are more than sufficient and that children are at no elevated risk from microwave radiation, wireless industry lobbyists don't generally have to set up appointments months in advance. They are at the FCC's door night and day.

Indeed, a former executive with the Cellular Telecommunications Industry Association (CTIA), the industry's main lobbying group, has boasted that the CTIA meets with FCC officials "500 times a year."[1]

Sharp does not seem surprised. "There's no question that the government has been under the influence of industry. The FCC is a captured agency," she said.[2]

Captured agency.

That's a term that comes up time and time again with the FCC. Captured agencies are essentially controlled by the industries they are supposed to regulate. A detailed look at FCC actions—and non-actions—shows that over the years the FCC has granted the wireless industry pretty much what it has wanted. Until very recently it has also granted cable what it wants. More broadly, the FCC has again and again echoed the lobbying points of major technology interests.

Money—and lots of it—has played a part. The National Cable and Telecommunications Association (NCTA) and CTIA have annually been among Washington's top lobbying spenders. CTIA alone lobbied on at least 35 different Congressional bills through the first half of 2014. Wireless market leaders AT&T and Verizon work through CTIA. But they also do their own lobbying, spending nearly $15 million through June of 2014, according to data from the Center for Responsive Politics (CRP). In all, CTIA, Verizon, AT&T, T-Mobile USA, and Sprint spent roughly $45 million lobbying in 2013. Overall, the Communications/Electronics sector is one of Washington's super heavyweight lobbyists, spending nearly $800 million in 2013-2014, according to CRP data.

But direct lobbying by industry is just one of many worms in a rotting apple. The FCC sits at the core of a network that has allowed powerful moneyed interests with limitless access a variety of ways to shape its policies, often at the expense of fundamental public interests.

As a result, consumer safety, health, and privacy, along with consumer wallets, have all been overlooked, sacrificed, or raided due to unchecked industry influence. The cable industry has consolidated into giant local monopolies that control pricing while leaving consumers little choice over content selection. Though the FCC has only partial responsibility, federal regulators have allowed the Internet to grow into a vast hunting grounds for criminals and commercial interests: the go-to destination for the surrender of personal information, privacy and identity. Most insidious of all, the wireless industry has been allowed to grow unchecked and virtually unregulated, with fundamental questions on public health impact routinely ignored.

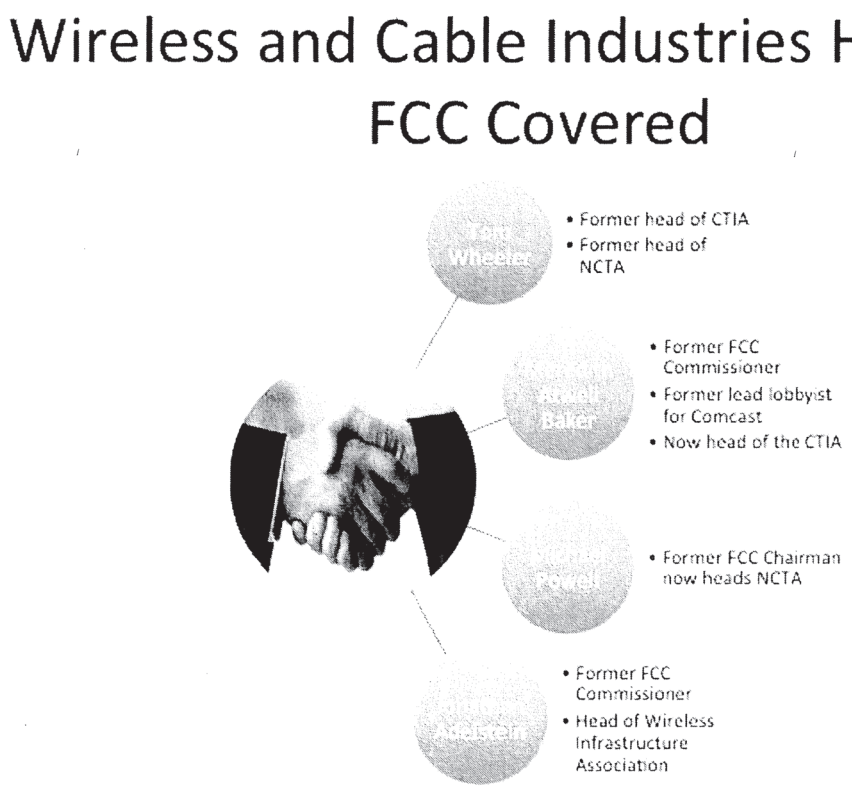
Industry controls the FCC through a soup-to-nuts stranglehold that extends from its well-placed campaign spending in Congress through its control of the FCC's Congressional oversight committees to its persistent agency lobbying. "If you're on a committee that regulates industry you'll be a major target for industry," said Twaun Samuel, chief of staff for Congresswoman Maxine Waters.[3] Samuel several years ago helped write a bill aimed at slowing the revolving door. But with Congress getting its marching orders from industry, the bill never gained any traction.

Industry control, in the case of wireless health issues, extends beyond Congress and regulators to basic scientific research. And in an obvious echo of the hardball tactics of the tobacco industry, the wireless industry has backed up its economic and political power by stonewalling on public relations and bullying potential threats into submission with its huge standing army of lawyers. In this way, a coddled wireless industry intimidated and silenced the City of San Francisco, while running roughshod over local opponents of its expansionary infrastructure.

On a personal level, the entire system is greased by the free flow of executive leadership between the FCC and the industries it presumably oversees. Currently presiding over the FCC is Tom Wheeler, a man who has led the two most powerful industry lobbying groups: CTIA and NCTA. It is Wheeler who once supervised a $25 million industry-funded research effort on wireless health effects. But when handpicked research leader George Carlo concluded that wireless radiation did raise the risk of brain tumors, Wheeler's CTIA allegedly rushed to muffle the message. "You do the science. I'll take care of the politics," Carlo recalls Wheeler saying.[4]

Wheeler over time has proved a masterful politician. President Obama overlooked Wheeler's lobbyist past to nominate him as FCC chairman in 2013. He had, after all, raised more than $700,000 for Obama's presidential campaigns. Wheeler had little trouble earning confirmation from a Senate whose Democrats toed the Presidential line and whose Republicans understood Wheeler was as industry-friendly a nominee as they could get. And while Wheeler, at the behest of his Presidential sponsor, has taken on cable giants with his plans for net neutrality and shown some openness on other issues, he has dug in his heels on wireless.

Newly ensconced as chairman of the agency he once blitzed with partisan pitches, Wheeler sees familiar faces heading the industry lobbying groups that ceaselessly petition the FCC. At CTIA, which now calls itself CTIA - The Wireless Association, former FCC commissioner Meredith Atwell Baker is in charge.



And while cell phone manufacturers like Apple and Samsung, along with wireless service behemoths like Verizon and AT&T, are prominent CTIA members, the infrastructure of 300,000 or more cellular base stations and antenna sites has its own lobbying group: PCIA, the Wireless Infrastructure Association. The President and CEO of PCIA is Jonathan Adelstein, another former FCC commissioner. Meanwhile, the cable industry's NCTA employs former FCC chairman Michael Powell as its president and CEO. Cozy, isn't it?

FCC commissioners in 2014 received invitations to the Wireless Foundation's May 19th Achievement Awards Dinner. Sounds harmless, but for the fact that the chief honoree at the dinner was none other than former wireless lobbyist but current FCC Chairman Tom Wheeler. Is this the man who will act to look impartially at the growing body of evidence pointing to health and safety issues?

The revolving door also reinforces the clout at another node on the industry-controlled influence network. Members of congressional oversight committees are prime targets of

industry. The cable industry, for example, knows that key legislation must move through the Communications and Technology Subcommittee of the House Energy and Commerce Committee. Little wonder then that subcommittee chairman Greg Walden was the second leading recipient (after Speaker John Boehner) of cable industry contributions in the last six years (through June 30, 2014). In all, Walden, an Oregon Republican, has taken over $108,000 from cable and satellite production and distribution companies.[5] But he is not alone. Six of the top ten recipients of cable and satellite contributions sit on the industry's House oversight committee. The same is true of senators on the cable oversight committee. Committee members were six of the ten top recipients of campaign cash from the industry.[6]

Cable & Satellite Campaign Contributions

Top House Recipients Funded

Recipient	Amount
John A. Boehner	$135,425
Greg Walden	$108,750
Bob Goodlatte	$93,200
John Conyers Jr.	$84,000
Mike Coffman	$82,137
Fred Upton	**$73,500**
Lee Terry	**$65,916**
Henry A. Waxman	**$65,000**
Cory Gardner	**$64,500**
Anna G. Eshoo	**$60,500**

Cellular Industry Campaign Contributions

Top House Recipients Funded

Recipient	Amount
Henry A. Waxman	**$41,500**
Scott H. Peters	$40,300
Greg Walden	**$35,750**
Fred Upton	**$32,250**
Bob Goodlatte	$31,250
Lee Terry	**$29,600**
Anna G. Eshoo	**$27,000**
Doris O. Matsui	**$25,500**
John Shimkus	**$24,000**
Peter J. Roskam	$21,100

Cable & Satellite Campaign Contributions

Top Senate Recipients Funded

Recipient	Amount
Edward J. Markey	**$320,500**
Kirsten E. Gillibrand	$194,125
Mitch McConnell	$177,125
Harry Reid	$175,600
Charles E. Schumer	$175,450
Mark L. Pryor	**$172,950**
Michael F. Bennet	$159,000
Richard Blumenthal	**$148,800**
Claire McCaskill	**$138,185**
Mark Udall	$136,625

Cellular Industry Campaign Contributions

Top Senate Recipients Funded

Recipient	Amount
Edward J. Markey	**$155,150**
Mark R. Warner	$74,800
Harry Reid	$73,600
Mark L. Pryor	**$71,900**
Roy Blunt	**$57,400**
John McCain	$56,261
Charles E. Schumer	$53,300
Roger F. Wicker	$51,300
Barbara Boxer	$49,578
Kelly Ayotte	$43,333

The compromised FCC network goes well beyond the revolving door and congressional oversight committees. The Washington social scene is one where money sets the tone and throws the parties. A look at the recent calendar of one current FCC commissioner shows it would take very disciplined and almost saintly behavior on the part of government officials to resist the lure of lavishly catered dinners and cocktail events. To paraphrase iconic investigative journalist I.F. Stone, if you're going to work in Washington, bring your chastity belt.

All that free liquor, food and conviviality translates into the lobbyist's ultimate goal: access. "They have disproportionate access," notes former FCC commissioner Michael Copps. "When you are in a town where most people you see socially are in industry, you don't have to ascribe malevolent behavior to it," he added.[7]

Not malevolent in motive. But the results can be toxic. And blame does not lie solely at the feet of current commissioners. The FCC's problems predate Tom Wheeler and go back a long way.

Indeed, former Chairman Newton Minow, enduringly famous for his 1961 description of television as a "vast wasteland," recalls that industry manipulation of regulators was an issue even back then. "When I arrived, the FCC and the communications industry were both regarded as cesspools. Part of my job was to try to clean it up."[8]

More than 50 years later, the mess continues to pile up.

Chapter Two: Just Don't Bring Up Health

Perhaps the best example of how the FCC is tangled in a chain of corruption is the cell tower and antenna infrastructure that lies at the heart of the phenomenally successful wireless industry.

It all begins with passage of the Telecommunications Act of 1996, legislation once described by South Dakota Republican senator Larry Pressler as "the most lobbied bill in history." Late lobbying won the wireless industry enormous concessions from lawmakers, many of them major recipients of industry hard and soft dollar contributions. Congressional staffers who helped lobbyists write the new law did not go unrewarded. Thirteen of fifteen staffers later became lobbyists themselves.[9]

Section 332(c)(7)(B)(iv) of the Act remarkably—and that adverb seems inescapably best here—wrests zoning authority from local governments. Specifically, they cannot cite health concerns about the effects of tower radiation to deny tower licenses so long as the towers comply with FCC regulations.

Congress Silences Public

Section 332(c)(7)(B)(iv) of the Communications Act provides:

> No State or local government or instrumentality thereof may regulate the placement, construction, and modification of personal wireless service facilities on the basis of the environmental effects of radio frequency emissions to the extent that such facilities comply with the Commission's regulations concerning such emissions.

In preempting local zoning authority—along with the public's right to guard its own safety and health— Congress unleashed an orgy of infrastructure build-out. Emboldened by the government green light and the vast consumer appetite for wireless technology, industry has had a free hand in installing more than 300,000 sites. Church steeples, schoolyards, school rooftops, even trees can house these facilities.

Is there any reason to believe that the relatively low level radiofrequency emissions of these facilities constitute a public health threat? Certainly, cell phones themselves, held close to the head, have been the focus of most concern on RF emissions. Since the impact of RF diminishes with distance, industry advocates and many scientists dismiss the possibility that such structures pose health risks.

But it's not really that simple. A troubling body of evidence suggests exposure to even low emission levels at typical cellular frequencies between 300 MHz and 3 GHz can have a wide range of negative effects.

In a 2010 review of research on the biological effects of exposure to radiation from cell tower base stations, B. Blake Levitt and Henry Lai found that "some research does exist to warrant caution in infrastructure siting."[10] They summarized the results on one 2002 study that compared the health of 530 people living at various distances within 300 meters of cell towers with a control group living more than 300 meters away. "Results indicated increased symptoms and complaints the closer a person lived to a tower. At <10 m, symptoms included nausea, loss of appetite, visual disruptions, and difficulties in moving. Significant differences were observed up through 100 m for irritability, depressive tendencies, concentration difficulties, memory loss, dizziness, and lower libido."[11]

A 2007 study conducted in Egypt found similar results. Levitt and Lai report, "Headaches, memory changes, dizziness, tremors, depressive symptoms, and sleep disturbance were significantly higher among exposed inhabitants than controls."[12]

Beyond epidemiological studies, research on a wide range of living things raises further red flags. A 2013 study by the Indian scientists S. Sivani and D. Sudarsanam reports: "Based on current available literature, it is justified to conclude that RF-EMF [electro magnetic fields] radiation exposure can change neurotransmitter functions, blood-brain barrier, morphology, electrophysiology, cellular metabolism, calcium efflux, and gene and protein expression in certain types of cells even at lower intensities."[13]

The article goes on to detail the effects of mobile tower emissions on a wide range of living organisms: "Tops of trees tend to dry up when they directly face the cell tower antennas. . . . A study by the Centre for Environment and Vocational Studies of Punjab University noted that embryos of 50 eggs of house sparrows were damaged after being exposed to mobile tower radiation for 5-30 minutes. . . . In a study on cows and calves on the effects of exposure from mobile phone base stations, it was noted that 32% of calves developed nuclear cataracts, 3.6% severely."[14]

Does any of this constitute the conclusive evidence that would mandate much tighter control of the wireless infrastructure? Not in the estimation of industry and its captured agency. Citing other studies—often industry-funded—that fail to establish health effects, the wireless industry has dismissed such concerns. The FCC has typically echoed that position.

Keep in mind that light regulation has been one factor in the extraordinary growth of wireless—CTIA says exactly that in a Web post that credits the Clinton Administrations light regulatory touch.

July 25, 2013

CTIA BLOG

CTIA is an international nonprofit trade association that has represented the wireless communications industry since 1984.

But our position as the world's leader was no accident. It started with the Clinton Administration that had the foresight to place a "light regulatory touch" on the wireless industry, which was in its infancy at the time. That light touch has continued through multiple Administrations.

Obviously, cellular technology is wildly popular because it offers many benefits to consumers. But even allowing for that popularity and for the incomplete state of science, don't some of these findings raise enough concern to warrant some backtracking on the ham-fisted federal preemption of local zoning rights?

In reality, since the passage of the 1996 law, the very opposite has occurred. Again and again both Congress and the FCC have opted to stiffen—rather than loosen—federal preemption over local zoning authority. In 2009, for example, the wireless industry convinced the FCC to impose a "shot clock" that requires action within 90 days on many zoning applications. "My sense is that it was an industry request," said Robert Weller, who headed up the FCC's Office of Engineering and Technology when the shot clock was considered and imposed.[15]

And just last November, the FCC voted to further curb the rights of local zoning officials to control the expansion of antenna sites Again and again, Congress and the FCC have extended the wireless industry carte blanche to build out infrastructure no matter the consequences to local communities.

The question that hangs over all this: would consumers' embrace of cell phones and Wi-Fi be quite so ardent if the wireless industry, enabled by its Washington errand boys, hadn't so consistently stonewalled on evidence and substituted legal intimidation for honest inquiry? (See Appendix for online study of consumer attitudes on wireless health and safety.)

Document searches under the Freedom of Information Act reveal the central role of Tom Wheeler and the FCC in the tower siting issue. As both lobbyist and FCC chairman, Wheeler has proved himself a good friend of the wireless industry.

In January of 1997, CTIA chieftain Wheeler wrote FCC Wireless Telecommunications Bureau Chief Michele C. Farquhar citing several municipal efforts to assert control over siting. Wheeler, for example, asserted that one New England state had enacted a law requiring its Public Service Commissioner to issue a report on health risks posed by wireless facilities.[16] He

questions whether such a study—and regulations based on its results—would infringe on FCC preemption authority.

FCC bureau chief Farquhar hastily reassured Wheeler that no such study could be consulted in zoning decisions. "Therefore, based on the facts as you have presented them, that portion of the statute that directs the State Commissioner to recommend regulations based upon the study's findings would appear to be preempted,"[17] the FCC official wrote to Wheeler. She emphasized that the state had the right to do the study. It just couldn't deny a siting application based on anything it might learn.

The FCC in 1997 sent the message it has implicitly endorsed and conveyed ever since: study health effects all you want. It doesn't matter what you find. The build-out of wireless cannot be blocked or slowed by health issues.

Now let's fast forward to see Wheeler on the other side of the revolving door, interacting as FCC chairman with a former FCC commissioner who is now an industry lobbyist.

A March 14, 2014 letter[18] reveals the chummy relationship between Wheeler and former commissioner Jonathan Adelstein, now head of PCIA, the cellular infrastructure lobbying group. It also references FCC Chairman Wheeler seeking policy counsel from lobbyist Adelstein:

Wheeler Still Willing to Help

From: Jonathan Adelstein [mailto:adelstein@pcia.com]
Sent: Friday, March 14, 2014 12:24 PM
To: [redacted]
Cc: Renee Gregory; Jonathan Campbell
Subject: How to Spur Wireless Broadband Deployment

Tom – It was great to see you the other night at the FCBA event, and wonderful to see how much fun you're having (if that's the right word). I know I enjoyed my time there (thanks to your help with Daschle in getting me that role in the first place!).

Thanks for asking how we think the FCC can help spur wireless broadband deployment. The infrastructure proceeding perfectly tees up many of the top issues the FCC needs to address. As you requested, I've summarized briefly in the attached letter some of the key steps you can take now.

"Tom – It was great to see you the other night at the FCBA event, and wonderful to see how much fun you're having (if that's the right word). I know I enjoyed my time there (thanks to your help with Daschle in getting me that role in the first place!)."

"Thanks for asking how we think the FCC can help spur wireless broadband deployment," the wireless lobbyist writes to the ex-wireless lobbyist, now running the FCC.

Adelstein's first recommendation for FCC action: *"Amend its rules to categorically exclude DAS and small deployments* [Ed. note: these are compact tower add-ons currently being widely deployed] *from environmental and historic review."* Adelstein outlined other suggestions for further limiting local antenna zoning authority and the FCC soon did its part. Late last year, the agency proposed new rules that largely (though not entirely) complied with the antenna industry's wish list.

James R. Hobson is an attorney who has represented municipalities in zoning issues involving the FCC. He is also a former FCC official, who is now of counsel at Best, Best and Krieger, a Washington-based municipal law practice. "The FCC has been the ally of industry," says Hobson. Lobbyist pressure at the FCC was intense even back in the 70s, when he was a bureau chief there. "When I was at the FCC, a lot of my day was taken up with appointments with industry lobbyists." He says of the CTIA that Wheeler once headed: "Their reason for being is promoting the wireless industry. And they've been successful at it."[19]

The FCC's deferential compliance has allowed industry to regularly bypass and if necessary steamroll local authorities. Violation of the FCC-imposed "shot clock," for example, allows the wireless license applicant to sue.

The FCC's service to the industry it is supposed to regulate is evidently appreciated. The CTIA web site, typically overflowing with self-congratulation, spreads the praise around in acknowledging the enabling contributions of a cooperative FCC. In one brief summation of its own glorious accomplishments, CTIA twice uses the word "thankfully" in describing favorable FCC actions.

In advancing the industry agenda, the FCC can claim that it is merely reflecting the will of Congress. But the agency may not be doing even that.

Remember the key clause in the 96 Telecom Act that disallowed denial of zoning permits based on health concerns? Well, federal preemption is granted to pretty much any wireless outfit on just one simple condition: its installations must comply with FCC radiation emission standards. In view of this generous carte blanche to move radiation equipment into neighborhoods, schoolyards and home rooftops, one would think the FCC would at the very least diligently enforce its own emission standards. But that does not appear to be the case.

Indeed, one RF engineer who has worked on more than 3,000 rooftop sites found vast evidence of non-compliance. Marvin Wessel estimates that "10 to 20% exceed allowed radiation standards."[20] With 30,000 rooftop antenna sites across the U.S. that would mean that as many as 6,000 are emitting radiation in violation of FCC standards. Often, these emissions can be 600% or more of allowed exposure levels, according to Wessel.

Antenna standards allow for higher exposure to workers. In the case of rooftop sites, such workers could be roofers, painters, testers and installers of heating and air conditioning

equipment, to cite just a few examples. But many sites, according to Wessel, emit radiation at much higher levels than those permitted in occupational standards. This is especially true of sites where service providers keep adding new antenna units to expand their coverage. "Some of these new sites will exceed ten times the allowable occupational radiation level," said Wessel.[21] Essentially, he adds, this means that nobody should be stepping on the roof.

"The FCC is not enforcing its own standard," noted Janet Newton, who runs the EMF Policy Institute, a Vermont-based non-profit. That group several years ago filed 101 complaints on specific rooftop sites where radiation emissions exceeded allowable levels. "We did this as an exercise to hold the FCC's feet to the fire," she said. But the 101 complaints resulted in few responsive actions, according to Newton.[22]

Former FCC official Bob Weller confirms the lax—perhaps negligible is the more appropriate word—FCC activity in enforcing antenna standards. "To my knowledge, the enforcement bureau has never done a targeted inspection effort around RF exposure," he said.[23] Budget cuts at the agency have hurt, limiting the FCC's ability to perform field inspections, he added. But enforcement, he adds, would do wonders to insure industry compliance with its limited regulatory compliance requirements. "If there were targeted enforcement and fines issued the industry would pay greater attention to ensuring compliance and self-regulation," he allowed.

Insurance is where the rubber hits the road on risk. So it is interesting to note that the rating agency A.M. Best, which advises insurers on risk, in 2013 topped its list of "emerging technology-based risks" with RF Radiation:

> *"The risks associated with long-term use of cell phones, although much studied over the past 10 years, remain unclear. Dangers to the estimated 250,000 workers per year who come in close contact with cell phone antennas, however, are now more clearly established. Thermal effects of the cellular antennas, which act at close range essentially as open microwave ovens can include eye damage, sterility and cognitive impairments. While workers of cellular companies are well trained on the potential dangers, other workers exposed to the antennas are often unaware of the health risks. The continued exponential growth of cellular towers will significantly increase exposure of these workers and others coming into close contact with high-energy cell phone antenna radiation,"* A.M. Best wrote.[24]

So what has the FCC done to tighten enforcement? Apparently, not very much. Though it does follow up on many of the complaints filed against sites alleged to be in violation of standards it takes punitive actions very rarely. (The FCC did not provide answers to written questions on details of its tower enforcement policies.)

The best ally of industry and the FCC on this (and other) issues may be public ignorance.

An online poll conducted for this project asked 202 respondents to rate the likelihood of a series of statements.[25] Most of the statements were subject to dispute. Cell phones raise the risk of certain health effects and brain cancer, two said. There is no proof that cell phones are harmful, another declared. But among the six statements there was one statement of indisputable fact: "The U.S. Congress forbids local communities from considering health effects when deciding whether to issue zoning permits for wireless antennae," the statement said.

Though this is a stone cold fact that the wireless industry, the FCC and the courts have all turned into hard and inescapable reality for local authorities, just 1.5% of all poll respondents replied that it was "definitely true."

Public ignorance didn't take much cultivation by the wireless industry on the issue of local zoning. And maybe it doesn't matter much, considering the enormous popularity of wireless devices. But let's see how public ignorance has been cultivated and secured—with the FCC's passive support—on the potentially more disruptive issue of mobile phone health effects.

Chapter Three: Wireless Bullies and the Tobacco Analogy

Issues of cable and net neutrality have recently attracted wide public attention (more on that in Chapter Six). Still, the bet here remains that future judgment of the FCC will hinge on its handling of wireless health and safety issues.

And while the tower siting issue is an egregious example of an industry-dominated political process run amuck, the stronger health risks appear to reside in the phones themselves. This is an issue that has flared up several times in recent years. Each time, industry has managed to beat back such concerns. But it's worth noting that the scientific roots of concern have not disappeared. If anything, they've thickened as new research substantiates older concerns.

The story of an FCC passively echoing an industry determined to play hardball with its critics is worth a further look. The CTIA's own website acknowledges the helpful hand of government's "light regulatory touch" in allowing the industry to grow.[26]

Former congressman Dennis Kucinich ventures one explanation for the wireless industry's success in dodging regulation: "The industry has grown so fast its growth has overtaken any health concerns that may have gained attention in a slow growth environment. The proliferation of technology has overwhelmed all institutions that would have attempted safety testing and standards," Kucinich said.[27]

But the core questions remain: Is there really credible evidence that cell phones emit harmful radiation that can cause human health problems and disease? Has the FCC done an adequate job in protecting consumers from health risks? Or has it simply aped industry stonewalling on health and safety issues?

Before wading into these questions, some perspective is in order.

First, there's simply no denying the usefulness and immense popularity of wireless technology. People depend on it for safety, information, entertainment and communication. It doesn't take a keen social observer to know that wireless has thoroughly insinuated itself into daily life and culture.

The unanswered question, though, is whether consumers would embrace the technology quite so fervently if health and safety information was not spun, filtered and clouded by a variety of industry tactics.

To gain some insight into this question, we conducted an online survey of 202 respondents, nearly all of whom own cell phones, on Amazon's Mechanical Turk Web platform (see Appendix). One striking set of findings: many respondents claim they would change behavior—reduce wireless use, restore landline service, protect their children—if claims on health dangers of wireless are true.

It is not the purpose of this reporter to establish that heavy cell phone usage is dangerous. This remains an extremely controversial scientific issue with new findings and revised scientific conclusions repeatedly popping up. Just months ago, a German scientist who had been outspoken in denouncing the view that cell phones pose health risks reversed course. In an April 2015 publication, Alexander Lerchl reported results confirming previous research on the tumor-promoting effects of electromagnetic fields well below human exposure limits for mobile phones. "Our findings may help to understand the repeatedly reported increased incidences of brain tumors in heavy users of mobile phones," the Lerchl team concluded.[28] And in May 2015, more than 200 scientists boasting over 2,000 publications on wireless effects called on global institutions to address the health risks posed by this technology.

But the National Cancer Institute still contends that no cell phone dangers have been established. A representative of NCI was the sole known dissenter among the 30 members of the World Health Organization's International Agency for Research on Cancer (IARC) when it voted to declare wireless RF "possibly carcinogenic."[29] If leading scientists still can't agree, I will not presume to reach a scientific conclusion on my own.

IARC RF working group: Official press release

International Agency for Research on Cancer

World Health Organization

PRESS RELEASE
N° 208

31 May 2011

IARC CLASSIFIES RADIOFREQUENCY ELECTROMAGNETIC FIELDS AS POSSIBLY CARCINOGENIC TO HUMANS

Lyon, France, May 31, 2011 -- The WHO/International Agency for Research on Cancer (IARC) has classified radiofrequency electromagnetic fields as **possibly carcinogenic to humans (Group 2B)**, based on an increased risk for **glioma**, a malignant type of brain cancer, associated with wireless phone use.

But let's at least look at some of the incriminating clues that health and biology research has revealed to date. And let's look at the responses of both industry and the FCC.

The most widely cited evidence implicating wireless phones concerns gliomas, a very serious type of brain tumor. The evidence of elevated risk for such tumors among heavy cell phone users comes from several sources.

Gliomas account for roughly half of all malignant brain tumors, which are relatively rare. The annual incidence of primary malignant brain tumors in the U.S. is only 8.2 per 100,000 people, according to the International Radio Surgery Association.

Still, when projected over the entire U.S. population, the public health impact is potentially very significant.

Assuming roughly four new glioma cases annually in the U.S. per 100,000 people, yields over 13,000 new cases per year over a total U.S. population of 330 million. Even a doubling of that rate would mean 13,000 new gliomas, often deadly, per year. A tripling, as some studies have found, could mean as many as 26,000 more new cases annually. Indeed, the respected online site Medscape in January 2015 reported results of Swedish research under the headline: *Risk for Glioma Triples With Long-Term Cell Phone Use.*[30]

And here's some eye-opening quantitative perspective: the wars in Iraq and Afghanistan, waged now for more than a decade each, have together resulted in roughly 7,000 U.S. deaths.

Preliminary—though still inconclusive—research has suggested other potential negative health effects. Swedish, Danish and Israeli scientists have all found elevated risk of salivary gland tumors. One Israeli studied suggested elevated thyroid cancer risk. Some research has found that men who carry their phones in their pockets may suffer sperm count damage. One small study even suggests that young women who carry wireless devices in their bras are unusually vulnerable to breast cancer.

And while industry and government have never accepted that some portion of the population is unusually sensitive to electromagnetic fields, many people continue to complain of a broad range of symptoms that include general weakness, headaches, nausea and dizziness from exposure to wireless.

Some have suggested that the health situation with wireless is analogous to that of tobacco before court decisions finally forced Big Tobacco to admit guilt and pay up. In some ways, the analogy is unfair. Wireless research is not as conclusively incriminating as tobacco research was. And the identified health risks with wireless, significant as they are, still pale compared with those of tobacco.

But let's not dismiss the analogy outright. There is actually a very significant sense in which the tobacco-wireless analogy is uncannily valid.

People tend to forget that the tobacco industry—like the wireless industry—also adopted a policy of tone-deaf denial. As recently as 1998, even as evidence of tobacco toxicity grew overwhelming, cigarette maker Phillip Morris was writing newspaper advertorials insisting there was no proof smoking caused cancer.

It seems significant that the responses of wireless and its captured agency—the FCC—feature the same obtuse refusal to examine the evidence. The wireless industry reaction features stonewalling public relations and hyper aggressive legal action. It can also involve undermining the credibility and cutting off the funding for researchers who do not endorse cellular safety. It is these hardball tactics that look a lot like 20th century Big Tobacco tactics. It is these hardball tactics—along with consistently supportive FCC policies—that heighten suspicion the wireless industry does indeed have something to hide.

Begin with some simple facts issuing from meta-analysis of cellular research. Dr. Henry Lai, emeritus professor of bioengineering at the University of Washington, has reviewed hundreds of published scientific papers on the subject. He wanted to see how many studies demonstrated that non-ionizing radiation produces biological effects beyond the heating of tissue. This is critical since the FCC emission standards protect only against heating. The assumption behind these standards is that there are no biological effects beyond heating.

But Dr. Lai found that just over half—actually 56%—of 326 studies identified biological effects. And the results were far more striking when Dr. Lai divided the studies between those that were industry-funded and those that were independently funded. Industry-funded research identified biological effects in just 28% of studies. But fully 67% of non-industry funded studies found biological effects (Insert Slide—Cell Phone Biological Studies).

A study conducted by Swiss and British scientists also looked at how funding sources affected scientific conclusions on the possible health effects of cell phone usage. They found that of studies privately funded, publicly funded and funded with mixed sponsorship, industry-funded studies were "least likely to report a statistically significant result."[31] "The interpretation of results from studies of health effects of radiofrequency radiation should take sponsorship into account," the scientists concluded.[32]

So how does the FCC handle a scientific split that seems to suggest bias in industry-sponsored research?

In a posting on its Web site that reads like it was written by wireless lobbyists, the FCC chooses strikingly patronizing language to slight and trivialize the many scientists and health and safety experts who've found cause for concern. In a two page Web post titled "Wireless Devices and Health Concerns," the FCC four times refers to either "some health and safety interest groups," "some parties," or "some consumers" before in each case rebutting their presumably groundless concerns about wireless risk.[33] Additionally, the FCC site references the World Health Organization as among those organizations who've found that "the weight of scientific

evidence" has not linked exposure to radiofrequency from mobile devices with "any known health problems."

Yes, it's true that the World Health organization remains bitterly divided on the subject. But it's also true that a 30 member unit of the WHO called the International Agency for Research on Cancer (IARC) was near unanimous in pronouncing cell phones "possibly carcinogenic" in 2011. How can the FCC omit any reference to such a pronouncement? Even if it finds reason to side with pro-industry scientists, shouldn't this government agency also mention that cell phones are currently in the same potential carcinogen class as lead paint?

Now let's look a bit more closely at the troublesome but presumably clueless crowd of "some parties" that the FCC so cavalierly hastens to dismiss? Let's begin with **Lennart Hardell**, professor of Oncology and Cancer Epidemiology at the University Hospital in Oreboro, Sweden.

Until recently it was impossible to gain any real sense of brain tumor risk from wireless since brain tumors often take 20 or more years to develop. But the cohort of long-term users has been growing. In a study published in the International Journal of Oncology in 2013, Dr. Hardell and Dr. Michael Carlberg found that the risk of glioma—the most deadly type of brain cancer—rose with cell phone usage. The risk was highest among heavy cell phone users and those who began to use cell phones before the age of 20.[34]

Indeed, those who used their phones at least 1640 hours (which would be roughly 30 minutes a day for nine years) had nearly three times the glioma incidence. Drs. Hardell and Carlberg also found that gliomas tend to be more deadly among heavy wireless callers.[35]

Perhaps of greatest long-term relevance, glioma risk was found to be four times higher among those who began to use mobile phones as teenagers or earlier. These findings, along with the established fact that it generally takes decades for tumors induced by environmental agents to appear, suggest that the worst consequences of omnipresent wireless devices have yet to be seen.

In a 2013 paper published in *Reviews on Environmental Health*, Drs. Hardell and Carlberg argued that the 2011 finding of the IARC that identified cell phones as a "possibly carcinogenic" needs to be revised. The conclusion on radiofrequency electromagnetic fields from cell phones should now be "cell phones are not just a possible carcinogen." They can now be "regarded as carcinogenic to humans" and the direct cause of gliomas (as well as acoustic neuromas, a less serious type of tumor).[36] Of course, these views are not universally accepted.

The usual spin among industry supporters when presented with research that produces troubling results is along the lines of: "We might pay attention if the results are duplicated." In fact, the Hardell results were echoed in the French CERENAT study, reported in May of 2014. The CERENAT study also found higher risk among heavy users, defined as those using their phones at least 896 hours (just 30 minutes a day for five years). "These additional data support

previous findings concerning a possible association between heavy mobile phone use and brain tumors," the study concluded.[37]

Cell phones are not the only wireless suspects. Asked what he would do if he had policy-making authority, Dr. Hardell swiftly replied that he would "ban wireless use in schools and pre-schools. You don't need Wi-Fi," he noted.[38] This is especially interesting in view of the FCC's sharply hiked spending to promote and extend Wi-Fi usage, as well as its consistent refusal to set more stringent standards for children (more on all this later). But for now let's further fill out the roster of the FCC's unnamed "some parties."

Martin Blank is a Special Lecturer in Physiology and Cellular Biophysics at Columbia University. Unlike Dr. Hardell, who looks at broad epidemiological effects over time, Dr. Blank sees cause for concern in research showing there is biological response at the cellular level to the type of radiation emitted by wireless devices. "The biology tells you unequivocally that the cell treats radiation as a potentially damaging influence," Dr. Blank said in a late 2014 interview.[39]

"The biology tells you it's dangerous at a low level," he added. Though some results have been difficult to replicate, researchers have identified a wide range of cellular responses including genetic damage and penetration of the blood brain barrier. Dr. Blank specifically cited the "cellular stress response" in which cells exposed to radiation start to make proteins.

It is still not clear whether biological responses at the cellular level translate into human health effects. But the research seems to invalidate the basic premise of FCC standards that the only biological effect of the type of radiation produced by wireless devices is tissue heating at very high power levels. But the standards-setting agencies "ignore the biology," according to Dr. Blank. He describes the FCC as being "in industry's pocket."[40]

Sweden's Lund University is annually ranked among the top 100 universities in the world. **Leif Salford** has been chairman of the Department of Neurosurgery at Lund since 1996. He is also a former president of the European Association for Neuro-Oncology. In the spring of 2000, Professor Salford told me that wireless usage constituted "the world's largest biological experiment ever."[41]

He has conducted numerous experiments exposing rats to cellular-type radiation. Individual experiments have shown the radiation to penetrate the blood-brain barrier, essential to protecting the brain from bloodstream toxins. Professor Salford also found that rats exposed to radiation suffered loss of brain cells. "A rat's brain is very much the same as a human's. They have the same blood-brain barrier and neurons. We have good reason to believe that what happens in rat's brains also happens in humans," he told the BBC in 2003. Dr. Salford has also speculated that mobile radiation could trigger Alzheimer's disease in some cases but emphasized that much more research would be needed to establish any such causal relationship. Does this man deserve to be dismissed as one of a nameless and discredited group of "some parties?"

And what about the **American Academy of Pediatrics (AAP),** which represents 60,000 American doctors who care for children? In a December 12, 2012 letter to former Ohio Congressman Dennis Kucinich, AAP President Dr. Thomas McInerny writes: "Children are disproportionately affected by environmental exposures, including cell phone radiation. The differences in bone density and the amount of fluid in a child's brain compared to an adult's brain could allow children to absorb greater quantities of RF energy deeper into their brains than adults."[42]

In a subsequent letter to FCC officials dated August 29, 2013, Dr. McInerny points out that "children, however, are not little adults and are disproportionately impacted by all environmental exposures, including cell phone radiation." Current FCC exposure standards, set back in 1996, "do not account for the unique vulnerability and use patterns specific to pregnant women and children," he wrote. (Insert slide: A Plea from Pediatricians). Does an organization representing 60,000 practitioners who care for children deserve to be brushed off along with "some health and safety interest groups?"

So what is the FCC doing in response to what at the very least is a troubling chain of clues to cellular danger? As it has done with wireless infrastructure, the FCC has to this point largely relied on industry "self-regulation." Though it set standards for device radiation emissions back in 1996, the agency doesn't generally test devices itself. Despite its responsibility for the safety of cell phones, the FCC relies on manufacturers' good-faith efforts to test them. Critics contend that this has allowed manufacturers undue latitude in testing their devices.

Critics further contend that current standards, in place since cell phones were barely in use, are far too lax and do not reflect the heavy usage patterns that have evolved. Worse still, industry is allowed to test its own devices using an imprecise system that makes no special provision for protecting children and pregnant women. One 2012 study noted that the procedure widely used by manufacturers to test their phones "substantially underestimates" the amount of RF energy absorbed by 97% of the population, "especially children." A child's head can absorb over two times as much RF energy. Other persons with smaller heads, including women, are also more vulnerable. The authors recommend an alternative computer simulation technique that would provide greater insight into the impact of cellular radiation on children and on to the specific RF absorption rates of different tissues, which vary greatly.[43]

Acting on recommendations of the General Accounting Office, the FCC is now reconsidering its standards for wireless testing and allowed emissions. On the surface, this may seem to represent an effort to tighten standards to promote consumer health and safety. But many believe the FCC's eventual new standard will actually be weaker, intensifying any health risk from industry's self-reported emission levels. "They're under great pressure from industry to loosen the criteria," notes Joel Moskowitz, director of the Center for Family and Community Health at UC Berkeley's School of Public Health.[44] One fear is that the FCC could measure the allowed radiation absorption level (SAR) over a wider sample of tissue, effectively loosening the

standard allowable energy absorption. One FCC official, who asked that his name not be used, contended that a decision had not yet been made to loosen the standard.

But to this point, there is little evidence the FCC is listening to anyone beyond its familiar friends in the wireless industry. Carl Blackman, a scientist at the Environmental Protection agency until retiring in 2014, notes that the FCC does rely to some degree on an inter-agency governmental group for advice on health matters. The group includes, for example, representatives from the EPA and the FDA.

Blackman served on that advisory group and he says that it has been divided. Though some government advisers to the FCC find evidence of wireless health risks convincing, others remain skeptical, said Blackman. Root of the skepticism: even though numerous researchers have found biological and health effects, the mechanism for action by non-ionizing radiation on the human body has still not been identified. "I don't think there's enough of a consensus within the Radio Frequency Inter-agency Working Group for them to come out with stricter standards," he says.[45]

But political pressures also figure mightily in all this. The EPA, notably, was once a hub of research on RF effects, employing as many as 35 scientists. However, the research program was cut off in the late 80s during the Regan presidency. Blackman says he was personally "forbidden" to study health effects by his "supervisory structure."[46] He termed it "a political decision" but recognized that if he wanted to continue to work at the EPA he would have to do research in another area.

Blackman is cautious in imputing motives to the high government officials who wanted his work at EPA stopped. But he does say that political pressure has been a factor at both the EPA and FCC: "The FCC people were quite responsive to the biological point of view. But there are also pressures on the FCC from industry." The FCC, he suggests, may not just be looking at the scientific evidence "The FCC's position—like the EPA's—is influenced by political considerations as well."[47]

Still, the FCC has ultimate regulatory responsibility and cannot indefinitely pass the buck on an issue of fundamental public health. Remarkably, it has not changed course despite the IARC classification of cell phones as possibly carcinogenic, despite the recent studies showing triple the glioma risk for heavy users, despite the floodtide of research showing biological effects, and despite even the recent defection of core industry booster Alex Lerchl. It is the refusal of both industry and the FCC to even acknowledge this cascade of warning signs that seems most incriminating.

Of course, industry behavior goes well beyond pushing for the FCC's willful ignorance and inaction. Industry behavior also includes self-serving public relations and hyper aggressive legal action. It can also involve undermining the credibility of and cutting off the funding for researchers who do not endorse cellular safety. It is these hardball tactics that recall 20th century Big Tobacco tactics. It is these tactics that heighten suspicion that the wireless industry does

indeed have a dirty secret. And it is those tactics that intensify the spotlight on an FCC that so timidly follows the script of the fabulously wealthy, bullying, billion-dollar beneficiaries of wireless.

Chapter Four: You Don't Need Wires To Tie People Up

So let's look a little more deeply at some of the actions of an industry group that boasts of 500 meetings a year with the FCC. Lobbying is one thing. Intimidation is another. CTIA has shown its skill at—and willingness to use—both.

Outright legal bullying is a favored tactic. The City of San Francisco passed an ordinance in 2010 that required cell phone manufacturers to display more prominently information on the emissions from their devices. This information was already disclosed—but often buried—in operator manuals and on manufacturer websites. The idea was to ensure that consumers saw information already mandated and provided.

Seeing this as a threat to its floodtide of business, the industry sued the City of San Francisco. The City, fearing a prolonged legal fight with an industry that generates hundreds of billions of dollars in annual revenue, backed down.

On May 12, 2015, Berkeley, California's City Council unanimously passed a similar ordinance. Joel Moskowitz, director of the Center for Family and Community Health at the University of California-Berkeley's School of Public Health, has been involved in the effort. Berkeley, he says, didn't want to run into the same legal threats that paralyzed San Francisco. So it tried to draft the most inoffensive and mild language possible. The proposed Cell Phone Right to Know ordinance: "To assure safety, the Federal Government requires that cell phones meet radio frequency (RF) exposure guidelines. If you carry or use your phone in a pants or shirt pocket or tucked into a bra when the phone is ON and connected to a wireless network, you may exceed the federal guidelines for exposure to RF radiation. This potential risk is greater for children. Refer to the instructions in your phone or user manual for information about how to use your phone safely."[48]

Sounds pretty inoffensive, no? Not to the CTIA, which indicated that it was prepared to sue, according to Berkeley City Attorney Zach Cowan.[49] (On June 8th, CTIA did indeed sue the City of Berkeley.)

Well, from the industry point of view, why not throw around your weight? Smash mouth legal tactics have been highly successful thus far as industry has managed to throttle several efforts to implicate manufacturers in cases where heavy users suffered brain tumors.

But one current case has advanced in district court in Washington to the point where the judge allowed plaintiffs to present expert witness testimony. The industry response: file a legal action seeking to invalidate long-held court methods for qualifying expert witnesses.

This is a very rich industry that does not hesitate to outspend and bully challengers into submission. Meanwhile, amidst the legal smoke and medical confusion, the industry has

managed to make the entire world dependent on its products. Even tobacco never had so many hooked users.

Such sustained success in the face of medical doubt has required industry to keep a lid on critics and detractors. Many scientists who've found real or potential risk from the sort of microwave radiation emanating from wireless devices have learned there is a price to be paid for standing up to the industry juggernaut. A few prominent examples:

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In 1994, University of Washington researchers Henry Lai and N.P. Singh found that rats exposed to microwave radiation suffered DNA damage to their brain cells. This was a scary finding since DNA damage can lead to mutations and possibly cancer.

The reaction from industry was swift. Motorola was at that time the U.S. market leader in cell phones. In a memorandum obtained by the journal Microwave News, Motorola PR honcho Norm Sandler outlined how the company could "downplay the significance of the Lai study." One step: "We have developed a list of independent experts in this field and are in the process of recruiting individuals willing and able to reassure the public on these matters," Sandler wrote. After outlining such measures, he concluded that Motorola had "sufficiently war-gamed" the issue. The practices of lining up industry-friendly testimony and "war-gaming" researchers who come up with unfavorable results have been persistent themes with this industry.

Motorola "War-Games" Bad News

Motorola, Microwaves and DNA Breaks: "War-Gaming" the Lai-Singh Experiments

"We have developed a list of independent experts in this field and are in the process of recruiting individuals willing and able to reassure the public on these matters."

"I think we have sufficiently war-gamed the Lai-Singh issue..."

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After Lai's results were published, Motorola decided to sponsor further research on microwaves and DNA damage. Oftentimes, lab results cannot be reproduced by other

researchers, particularly if experiments are tweaked and performed a bit differently. Non-confirming studies raise doubt, of course, on the original work.

Motorola lined up Jerry Phillips, a scientist at the Veteran's Administration Medical Center in Loma Linda, California, and Phillips tested the effect of radiation at different frequencies from those tested by Lai and Singh. Nevertheless, Phillips found that at some levels of exposure, DNA damage increased, while at other levels it decreased. Such findings were "consistent" with the sorts of effects produced by chemical agents, Phillips said in an interview.[50] In some cases, the radiation may have activated DNA repair mechanisms, reducing the overall microwave effect. But what was important, Phillips explained, is that there were *any* biological effects at all. The wireless industry has long contended—and the FCC has agreed—that there is no evidence that non-ionizing radiation at the frequencies and power levels used by cell phones is biologically active.

Understanding the potential impact of "biological effect" findings, Motorola again turned to damage control, said Phillips. He recalls receiving a phone call from a Motorola R&D executive. "I don't think you've done enough research,'" Phillips recalls being told. The study wasn't ready for publication, according to the Motorola executive. Phillips was offered more money to do further research without publishing the results of what he'd done.

But Phillips felt he'd done enough. Despite warnings for his own boss to "give Motorola what it wants," Phillips went ahead and published his findings in 1998. Since then, Phillips' industry funding has dried up. Meanwhile, as many other researchers report, government funding to do independent research on microwave radiation has dried up, leaving the field at least in the U.S. to industry-funded scientists. "There is no money to do the research," Said Phillips. "It's not going to come from government because government is controlled by industry."[51]

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Om P. Gandhi is Professor of Electrical and Computer Engineering at the University of Utah and a leading expert in dosimetry—measurement of non-ionizing radiation absorbed by the human body. Even before cell phones were in wide use, Professor Gandhi had concluded that children absorb more emitted microwave radiation. "The concentration of absorbed energy is 50 to 80% greater," he explained.[52]

These conclusions were not acceptable to Professor Gandhi's industrial sponsors. In 1998, he recalls, an executive from a cell phone manufacturer—which he did not want to identify—told him directly that if he did not discontinue his research on children his funding would be cut off. Professor Gandhi recalled replying: "I will not stop. I am a tenured professor at the University of Utah and I will not reject my academic freedom." Professor Gandhi also recalled some of his thought process: "I wasn't going to order my students to alter their results so that I can get funding." His industry sponsors cancelled his contract and asked for a return of funds.

Professor Gandhi believes that some cell phone users require extra protection because their heads are smaller and more absorptive. "Children, as well as women and other individuals with smaller heads absorb more concentrated energy because of the proximity of the radiating antenna to the brain tissue," he said. And yet the FCC has not acted to provide special protection for these groups. Asked why not, Professor Gandhi conceded that he doesn't know. He does note, however, that recent standards-setting has been dominated by industry representatives.[53]

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While the mobile industry refuses to admit to even the possibility that there is danger in RF radiation, giant insurance companies see things differently. Several insurers have in recent years issued reports highlighting product liability risk with cell phones. This is important because it is evidence that where money is on the line professionals outside the industry see the risk of legal liability.

Legal exposure could be one reason—perhaps the central one—the industry continues to stonewall. Should legal liability be established, one key question will be how much wireless executives knew—and at what point in time. Meanwhile, the combination of public relations denials, legal intimidation and the selective application of pressure on research follows a familiar pattern. "The industry is basically using the tobacco industry playbook," UC Berkeley's Moskowitz said in a recent radio interview.[54]

That playbook has thus far been highly successful in warding off attention, regulation and legal incrimination.

Chapter Five: $270 Billion . . . and Looking for Handouts

The FCC's network of corruption doesn't just shield industry from needed scrutiny and regulation on matters of public health and safety. Sometimes it just puts its hand directly into the public pocket and redistributes that cash to industry supplicants.

Such is arguably the case with the Universal Service Fund. Originally established to extend telephone service to rural and urban areas that industry would find difficult or uneconomical to wire, the USF is now shifting from subsidizing landline phone service to subsidizing the extension of broadband Internet. USF monies also support the Lifeline program, which subsidizes cell phone service to low-income consumers, and the E-Rate program, which subsidizes Internet infrastructure and service to schools and libraries.

Since 1998, more than $110 billion has been allocated to Universal Service programs, notes Charles Davidson, director of the Advanced Communications Law & Policy Institute at New York Law School. The FCC has allocated over $40 billion to the E-Rate program alone.

Who pays the freight for these high-cost programs? You do.

Technically, landline and wireless phone companies are assessed for the Universal Service fund's expenditures. But the FCC also allows those companies to pass on such charges to their subscribers, which they do. Both landline and wireless subscribers pay a monthly Universal Service charge that is tacked on to their phone bills. That charge has been rising and recently amounted to a 16% surcharge on interstate calls.

Consumers who pay for these programs might be interested to learn that both the E-Rate and Lifeline programs have been riddled with fraud. Government watchdogs have repeatedly found the programs to be inefficient and prone to inflated and fraudulent claims. But the programs have been a windfall for tech and telecom industry beneficiaries. Wherever the FCC presides, it seems, these industries reap a windfall.

The General Accounting Office (GAO) has issued several reports citing fraud, waste and mismanagement, along with inadequate FCC oversight of the subsidy program. Bribery, kickbacks and false documentation can perhaps be expected in a handout program mandated by Congress and only indirectly supervised by the FCC.

But the scope of fraud has been impressive. The most striking corruption has marred the E-Rate program, which subsidizes Internet hardware, software and service for schools and libraries, and the Lifeline cell phone subsidies.

In recent years, several school districts have paid fines to settle fraud cases involving bribery, kickbacks, non-competitive bidding of contracts and false documentation in the E-Rate

program. More eye opening perhaps are the settlements of fraud claims by tech giants like IBM, Hewlett Packard and AT&T. The HP case, for example, involved some colorful bribery allegations, including gifts of yachts and Super Bowl tickets. HP settled for $16 million. An HP official and a Dallas Independent School District official both received jail sentences.

The Lifeline program has also been riddled with fraud. A Wall Street Journal investigation of the five top corporate beneficiaries of Lifeline showed that 41% of more than 6 million subsidy claimants "couldn't demonstrate their eligibility or didn't respond to requests for certification."[55] AT&T, Verizon, and Sprint Nextel were three of the major Lifeline beneficiaries.

The FCC has initiated several efforts to clean up USF programs and seems honestly determined to bring greater accountability and efficiency to its subsidy efforts. Nevertheless, problems with fraud persist, as reported recently by the FCC's own top investigator.

Congress established the FCC's Office of Inspector General in 1989 to "provide objective and independent investigations, audits and reviews of the FCC's programs and operations." Here's what the FCC's internal investigative unit said in a September 30, 2014 report to Congress about its Office of Investigation (OI): "*The bulk of the work of OI involves investigating and supporting civil and criminal investigations/prosecutions of fraud in the FCC's federal universal service program.*"[56]

Fraud—as pervasive and troubling as it has been—is just one of the problems with the programs of universal service. It may not even be the fundamental problem. More fundamental issues concern the very aim, logic and efficiency of programs to extend broadband and wireless technology at public expense. Though the aims of extending service to distant impoverished areas seem worthy on the surface, there are many reasons to think the major beneficiaries of these programs are the technology companies that win the contracts.

Lobbyists have long swarmed over the FCC looking to get an ever-growing piece of the USF honeypot. An FCC report on meetings with registered lobbyists details a 2010 meeting with representatives of the International Society for Technology in Education and other education lobbyists. Topics discussed, according to the FCC report, included "the need to raise the E-Rate's annual cap."[57]

The CTIA, leaving no stone unturned in its efforts to pump up member revenues, last year responded to a House hearing on the USF by grousing that "current USF-supported programs skew heavily toward support of wireline services. . . . The concentration of USF monies to support wireline services is inconsistent with technological neutrality principles and demonstrated consumer preferences," CTIA wrote..[58] An industry that generates hundreds of billions of dollars in equipment and service revenues annually bellies up for a bigger slice of the $8 billion a year USF.

The grousing has paid off. The FCC recently announced that it will raise spending on E-Rate from what had been a cap of $2.4 billion a year to $3.9 billion. A significant portion of new outlays will go to Wi-Fi—yet another wireless industry victory at the FCC. But the CTIA is by no means the only industry group pressing the FCC.

Leading the roster of active lobbyists on E-Rate issues is the Software and Information Industry Association. Beginning in 2006, SIAA led all lobbyists with 54 mentions of E-Rate in its filings, according to the Center for Responsive Politics. SIAA board members include executives from tech heavyweights Google, Oracle and Adobe Systems.

Tech business leaders—many of them direct beneficiaries of FCC programs—made a direct pitch to FCC Chairman Wheeler last year to hike E-Rate funding. "The FCC must act boldly to modernize the E-Rate program to provide the capital needed to upgrade our K-12 broadband connectivity and Wi-Fi infrastructure within the next five years," the executives wrote.[59]

There were dozens of corporate executive signees to this letter, including the CEOs of many Fortune 500 giants. But let's just consider the participation of three: top executives of Microsoft, Google and HP all joined the call to expand E-Rate subsidies. Consider the simple fact that these three tech giants alone had revenues of $270 billion—more than a quarter of a trillion dollars—in a recent four-quarter period. Together, they produced nearly $40 billion in net income. And yet their top executives still thought it necessary to dun the FCC—and really, they were surreptitiously hitting up the public—for ramped-up spending on what was then a $2.4 billion a year program.

Is that greed? Arrogance? Or is it simply behavior conditioned by success in repeatedly getting what they want at the public trough? Almost never mentioned in these pleas for higher subsidies is the fact that ordinary American phone subscribers are the ones footing the bill for the E-Rate program—not the FCC or the telecom industry.

The most telling footnote to the deal would come just four months later. FCC Commissioner Meredith Atwell Baker, who voted to approve the merger in January 2011, left the FCC to become a top-tier Comcast lobbyist in May. It was the ultimate—and perhaps most telling—glide of the revolving door.

Baker's was a high-profile defection. But it was neither the first nor the last. Comcast had successfully convinced other FCC officials to take their expertise and government contacts to the cable giant. Comcast has long been a master at spinning the revolving door to its own advantage. "Comcast has been very good at hiring everyone who is very smart," said Crawford.[74]

Approval of the NBC Universal deal was another in the long string of FCC merger approvals that made Comcast a nationwide monopolist that could dictate both pricing and viewer programming choice.

But the deal may have had another unintended consequence. It set the stage for Comcast's subsequent battles on net neutrality. "Those mergers gave additional oomph to the issue of net neutrality," noted former commissioner Copps. Speaking specifically of Comcast's buyout of NBC Universal, IHS senior analyst Eric Brannon agreed. "That merger laid the grounds for net neutrality."

In allowing Comcast to acquire major programming assets, the deal would sharpen questions about the power of gatekeepers like Comcast to control the flow of traffic from rival Web services. So in bowing to lobbyist pressure, the FCC would bring on itself a whole new set of pressures by focusing public attention on the issue of net neutrality.

With activists rounding up comments from the public and hip TV personalities like HBO's John Oliver also beating the drums, net neutrality quickly grew into a popular issue that won the support of President Obama, and by proxy, his hand-picked appointee Tom Wheeler. When the FCC ruled in February of 2015 that it would seek Title II authority to regulate the Internet and presumably block any favoritism by broadband gatekeepers, it seemed to finally cast its lot with the public against steamrolling corporate interests

The issue had simmered for years but reached full boil when movie purveyor Netflix, which had argued that its service was slowed down by Comcast, signed a side deal ensuring better download speeds for its wares. This triggered an outburst of public concern that Comcast was now in position to operate "fast" and "slow" lanes, depending on whether a rival programmer could afford to ensure that Comcast provide adequate download speed.

With nearly 4 million comments—many supplied or encouraged by public interest groups—filed to the FCC, net neutrality was a bankable political issue. And there's no question, net neutrality attracted public interest because it gave cable viewers—long furious at the treatment by the monopolists who send them monthly bills—issues of both viewing pleasure and economics.

But it also fed into the longstanding sentimental but increasingly unrealistic view of the Internet as the last bastion of intellectual freedom. Internet romanticists have long seen the Web as a place that somehow deserves special rules for breaking the stranglehold of traditional media and offering exciting new communications, information retrieval and shopping efficiencies.

Yes, the Internet is a modern marvel. This is beyond dispute. But some of the favors it has won from government over the years have had unfortunate unintended consequences.

In the 1990s, for example, net access providers were repeatedly exempted as an "infant industry" from paying access charges to the Baby Bells even though they had to connect users through local phone networks. The long distance companies were then paying as much as $30 billion a year for the privilege. But the Internet was exempted.

As the late 90s approached, the Internet was no longer an infant industry. Still, the exemption from access charges was extended. That exemption essentially allowed AOL in the late 90s to offer unlimited unmetered online time, a key factor in boosting usage and siphoning advertisers from print media. Why buy an ad in print that might get viewed with the transitory flip of a page when you can get round-the-clock attention online?[75] FCC decisions to grant the Internet access-charge exemptions arguably accelerated the decline of print media and much of the quality journalism print advertising could once support.

Meanwhile, retailers on the Internet were making inroads into brick and mortar retail business with the help of a Supreme Court-sanctioned exemption from collecting sales tax.[76] This judicial coddling of the Internet was the death knell for many smaller mom and pop local businesses, already challenged to match online pricing. And that's not all. The special favors continue virtually every year, as Congress proposes and/or passes legislation to extend special tax exemptions to Internet services.

Well, maybe tax breaks aren't such a bad idea for such an innovative and transformational emerging technology. For all its faults, the Internet—gateway to all goods, repository of all things, wizardly guide to all knowledge, enabler of universal self-expression—is undeniably cool.

But let's not deny that the combination of tax advantages and deregulation was toxic. Allow an industry to emerge with advantages over useful existing industries that largely play by the rules—well, maybe that can be rationalized. But then fail to hold the upstart industry to the same rules, allowing it more leeway to trample fundamental rights because it has the technical capacity to do so. Well, then you have a cruel Faustian bargain.

With the see-no-evil deregulatory gospel loosing all constraints, the Web would devolve into a playground for corporate snoops and criminals. For all its wonders, the Internet comes at a cost: the loss of control over personal data, the surrender of personal privacy, sometimes even the confiscation of identity.

Perhaps the most favorable consequence of net neutrality—and one that has gotten surprisingly little attention—is that it could set the stage for privacy reform. (More on this in Chapter Seven). The FCC can now choose to exercise its Title II powers to enforce privacy standards over broadband Internet. Privacy is one area where the FCC has done a pretty good job in the past.

Worth remembering, though, is that the hard-fought public victory over Net Neutrality may be transitory. AT&T and others have threatened to go to court to upend the FCC rules. And there's a fair chance a Republican Congress will legislate against Title II.

Meanwhile, though, one supreme irony has begun to unfold in the marketplace.

Modern-day laissez fair ideologues love to invoke the wisdom of markets as represented by the "mysterious hand" of Adam Smith. Unfortunately, in the absence of effective regulation, the putatively wise "mysterious hand" generally seems to work its magic for those with huge financial resources and the political access it buys.

In the current cable situation, however, the mysterious hand may actually be working in consumer-friendly ways. Years of regulation that favored the cable companies have now backfired as the market reacts to monopolistic pricing and content control.

Whereas cable giants have commanded premium monthly subscriber prices to deliver packages of largely unwatched channels, the market is now beginning to burst with new "debundled" options that are whittling away at cable's vast subscriber base.

Satellite service Direct TV, as noted, now offers its streaming video Sling TV package of popular networks that includes live sports and news. Amazon, Apple, CBS, HBO, Netflix, Sony, and others offer a variety of streaming video options that allow viewers to cut the cable cord. Suddenly, consumers have the cherry-picking capability that bundled—and expensive—cable packages have never allowed.

In this case, at least, the unintended consequences of the FCC's pro-industry policies may be producing an unexpected pro-consumer twist.

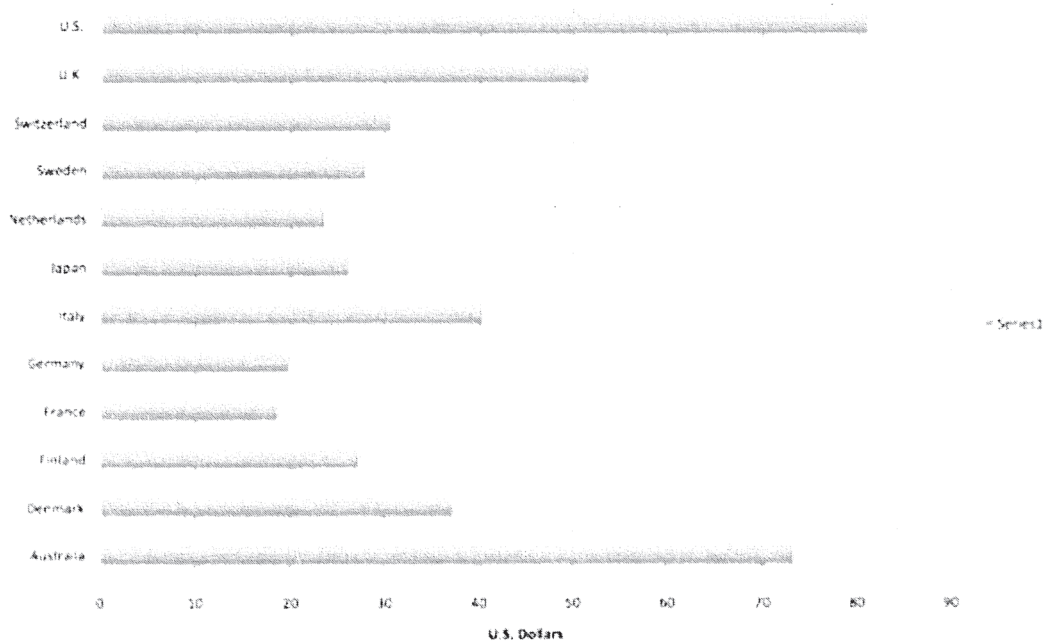
Chapter Six: The Cable Connection

The network has also been active in diluting FCC control of the cable television industry. Over the years, cable has devolved into major de facto local monopolies. Comcast and Time Warner Cable, whose merger proposal was dropped in April, are dominant forces in both cable television and broadband Internet subscriptions. Somehow, though, they have managed to steer clear of one another in specific markets, giving each pricing power where it faces little local competition.

It's interesting that cable companies annually rank in consumer polls among the "most hated" or "most disliked" American corporations. Indeed, Comcast and Time Warner Cable often top the "most hated" list.[71] Why would these companies—providers of the TV programming that has so expanded consumer options in recent decades—be so widely scorned? After all, the U.S. has been a leader in developing both cable technology and diverse television programming.

The problem is that it hasn't been anything close to a leader in bringing down subscriber prices. Industry consultants typically measure pricing by the metric of average revenue per subscriber. Industry trackers at IHS compared the price of U.S. pay television (which includes satellite services) to those in more than 60 other countries. U.S. prices were the highest, with only Australia even coming close. The average revenue per subscriber in the U.S. in 2013 was $81. But in France it was just $18.55. In Germany it was $19.68. In Japan it was just over $26.

Pay TV Monthly Revenue Per Person:



And U.S. cable prices have risen in recent years at rates three or more times the rate of inflation. This has been going on for some time. From 1995 to 2013 cable rates increased at a 6.1% annual clip. The Consumer Price Index, by contrast, rose by just 2.4% annually. Former FCC commissioner Michael Copps says the FCC shares a major part of the blame. "The FCC is as culpable for allowing that as much as the companies for imposing it," he said.[72]

One area where the FCC has contributed to the problem is in its traditional rubber-stamping of merger agreements. The proposed Comcast/Time Warner Cable deal has been shelved, largely because of Justice Department reservations. But a long run of earlier FCC-sanctioned deals allowed Comcast and Time Warner Cable to grow to the market dominance—and attendant pricing power—they currently command.

Lofty monthly cable bills pinch consumers. But it's more than that. Subscribers paying $80 a month are often paying for a lot of channels they don't watch and don't want. The FCC has never required cable operators to charge for what consumers actually want to watch. Kevin Martin, who chaired the FCC from 2005 to 2009, pushed to "debundle" programming in hopes of lowering bills. But the issue was never resolved. Only recently have viable competitive alternatives to cable's "bundled" packages become available. The satellite service Dish, for example, months ago introduced its Sling offering that enables consumers to opt for smaller and cheaper packages.

In fairness to cable operators, it should be pointed that programmers often require operators to take unwanted or fledgling channels along with their stars. New York cable operator Cablevision Systems filed suit against Viacom in 2013, charging that in order to get popular channels like MTV and Nickelodeon it was also forced to take low-rated channels like Nicktoons and VH1 Soul. But the simple truth is that no matter who is to blame, the cable consumer pays high prices, typically for some programming he doesn't want. As it often does when powerful interests pursue dubious practices, the FCC has for the most part idly stood by.

Still, the FCC isn't entirely to blame. Some factors in the growth of the cable giants cannot be laid at its doorstep. Local municipalities often granted monopoly or duopoly status in granting franchises to cable network builders. With the huge capital investments required to cable metropolitan areas, this once seemed to make sense.

And over the years, the cable giants have used a variety of tactics to weaken what little local competition they may have had. Active lobbyists on the local level, the cable giants have managed to convince a growing number of states to outlaw municipal systems that could threaten private corporate incumbents. The FCC for many years declined to tangle with the states in this matter, partly due to the opposition of Republican commissioners. But the Wheeler-led Commission did vote recently to override state laws that limit the build-out of municipal cable systems.

Still, many years of industry subservience will be difficult to swiftly undo. One linchpin merger shows how FCC decision-making has been thoroughly undermined by the revolving door, lobbying, and carefully targeted campaign contributions. All conspired in Comcast's pivotal 2011 buyout of NBC Universal, a deal which reinforced Comcast's domination of both cable and broadband access. This deal also set the stage for the recent headline-grabbing acrimony over the issue of net neutrality.

In 2011, mighty Comcast proposed to acquire NBC Universal. A series of mergers including the 1986 acquisition of Group W assets and the 2002 acquisition of AT&T's cable assets had already vaulted Comcast into cable market leadership. In bidding for NBC Universal, a huge step towards vertical integration, Comcast was once again raising the stakes. NBC Universal would give Comcast a treasure trove of programming, including valued sports content like NFL football and the Olympics.

Suddenly, the issue was not just cable subscriber base size—where Comcast had already bought its way to dominance. NBC Universal would also allow Comcast to consolidate its growing power as a broadband Internet provider. And with NBC Universal's programming assets, Comcast would gain new leverage when negotiating prices to carry the competing programming content of rivals. This would prompt a new round of debate over net neutrality. Couldn't a programming-rich Comcast slow down rival services—or charge them more to carry their programming?

To short-circuit any potential opposition to the merger, Comcast assembled a superstar cast of lobbyists. As Susan Crawford reports in her 2013 book, "Comcast hired almost eighty former government employees to help lobby for approval of the merger, including several former chiefs of staff for key legislators on congressional antitrust committees, former FCC staffers and Antitrust Division lawyers, and at least four former members of Congress.[73] Such "profligate hiring," Crawford observes, pretty much silenced the opposition to the deal. If Comcast had already retained one member of a lobbying firm, the firm could not under conflict of interest rules object to the deal. And Comcast had locked up key lobbying shops. Money was both weapon and silencer.

Of course, Comcast had always been a big spender on lobbying, with outlays exceeding $12 million every year since 2008. Lobbying costs peaked in 2011 at $19.6 million, according to the Center for Responsive Politics.

For its part, the FCC had a long history of approving most media mergers. So it was hardly a great surprise when the agency, after exacting some relatively minor concessions from Comcast, rubber-stamped the deal. Comcast would thus broaden its footprint as local monopoly distributor of cable. And with its new programming assets, it would enhance its leverage in negotiating deals to carry its rivals' programming. It would also fortify its position of growing strength as broadband Internet gatekeeper.

Much of the added spending, as noted, will go towards the installation of wireless networks. And yet Wi-Fi does not have a clean bill of health. When Lennart Hardell, professor of Oncology and Cancer Epidemiology at the University Hospital in Orebro, Sweden, was asked what he would do if given policy authority over wireless health issues, he replied swiftly that he would "ban wireless use in schools and pre-school." Noting that there are wired alternatives, Professor Hardell flatly stated: "You don't need Wi-Fi."[60] And yet the FCC, prodded by an industry ever on the lookout for incremental growth opportunities, is ignoring the health of youngsters to promote expanded Wi-Fi subsidies in schools across the U.S.

And what about the merit of the program itself? Overlooking the fraud and lobbying and Wi-Fi safety issues for a moment, shouldn't schools and libraries across the country be equipped with the best electronic gear, accessing the Internet at the fastest speeds? Doesn't the government owe that to its younger citizens, especially those disadvantaged by the long-referenced digital divide?

Well, maybe. But answers to these questions hinge on even more fundamental question: Do students actually learn more or better with access to the latest high-speed electronic gadgetry?

It would be foolish to argue that nobody benefits from access to high-speed Internet. But the benefits are nowhere near as broad or rich as corporate beneficiaries claim. Some researchers, for example, have concluded that computers don't seem to have positive educational impact—they may even have negative impact—when introduced into the home or freely distributed to kids from low income backgrounds.

Duke University researchers Jacob Vigdor and Helen Ladd studied the introduction of computers into North Carolina homes. They found that the academic performance of youngsters given computers actually declined. *"The introduction of home computer technology is associated with modest but statistically significant and persistent negative impacts on student math and reading test scores,"* the authors wrote in a National Bureau of Economic Research Working Paper.[61] The impact was actually most negative on the poorer students.

A study in the Journal of International Affairs examined the impact of the global One Laptop Per Child Program (OLPC), which has distributed millions of computers to children around the world. Researchers Mark Warschauer and Morgan Ames conclude: *"The analysis reveals that provision of individual laptops is a utopian vision for the children in the poorest countries, whose educational and social futures could be more effectively improved if the same investments were instead made on more proven and sustainable interventions. Middle- and high-income countries may have a stronger rationale for providing individual laptops to children, but will still want to eschew OLPC's technocratic vision. In summary, OLPC represents the latest in a long line of technologically utopian schemes that have unsuccessfully attempted to solve complex social problems with overly simplistic solutions."*[62]

Chapter Seven: What about Privacy?

Has any issue gotten as much lip service—and as little meaningful action?

For all the various congressional bills, corporate self-regulatory schemes and presidential Privacy Bill of Rights proposals, the simple truth remains that no personal information is safe on the Internet. Data brokers have built a multi-billion dollar business exchanging information used to build profiles of Net users. Your shopping and surfing habits, your health history, your banking data, your network of social ties, perhaps even your tax filings are all potentially exposed online. Both legal and criminal enterprises amass this information. And it doesn't go away.

At any given moment people you don't know somehow know where you are. They may very well know when you made your last bank deposit, when you had your last asthma attack or menstrual period. Corporations encourage and pay for every bit of information they can use or sell. Creepy? Perhaps, but as Jeff Chester, president of the Center for Digital Democracy points out: "The basic business model that drives online is advertising."[77]

The FCC largely escapes blame on this one. It is the Federal Trade Commission that has had primary responsibility for protecting Internet privacy. The FCC does have some limited authority, which, some critics say, could have been exercised more vigorously. But for the most part the FCC is not to blame for the rampant online abuse of personal privacy and identity.

The FCC does however have privacy authority over the phone, cable and satellite industries. Until recently, at least, the FCC has kept privacy issues at bay among the companies in these industries. "The FCC has generally taken privacy very seriously," noted Harold Feld, a senior vice president at the non-profit Public Knowledge.[78]

But dynamics now in place suggest that privacy may be the next great testing ground for the FCC. A new chance, perhaps, to champion public interest. Even before the opportunity for privacy enforcement under Title II regulatory powers, the FCC faces new challenges from phone companies, now itching to monetize their vast consumer data stashes the way Net companies have. The commonly used term is "Google envy."

"Until now, ISPs (Internet Service Providers) have mostly not gotten into hot water on privacy—but that's changing," observed Jonathan Mayer, a fellow at the Center for Internet and Society.[79] Verizon and AT&T, major providers of mobile Internet access, have each introduced "super cookies" that track consumer behavior even if they try to delete older, less powerful, forms of cookies. AT&T is actually charging its customers an extra $30 a month *not* to be tracked.

Showdowns loom.

In adopting Title II to enforce net neutrality, the FCC has made broadband Internet access a telecom service subject to regulation as a "common carrier." This reclassification means that the FCC could choose to invoke privacy authority under Title II's Section 222. That section, previously applied to phone and cable companies, mandates the protection of consumer information. Such information—called CPNI for Customer Proprietary Network Information—has kept phone companies from selling data on whom you call, from where you call and how long you spend on the phone. Consumers may have taken such protection for granted on their phone calls. But they have no such protection on their Internet activity—which, as noted, has been a multi-billion dollar safe house hideaway for corporate and criminal abusers of personal privacy.

Now, though, the FCC could put broadband Internet communications under Section 222 protection. To Scott Cleland, a telecom industry consultant who has often been ahead of the analytic pack, this would be a momentous decision.

When the smoke clears—and it hasn't yet—the FCC could make consumer identifiers like IP addresses the equivalent of phone numbers. Suddenly, the Internet companies that have trafficked in all that personal data would be subject to the same controls as the phone and cable companies.

Cleland argues that the risk for privacy abuses extends beyond broadband access providers like Comcast and Verizon to Internet giants like Google and Facebook that have until now flourished with all that personal data. "They are at risk and they are going to live under the uncertainty their business model could be ruled illegal by the FCC," Cleland said.[80]

Much has been written about the legal challenges broadband access providers intend to mount against the FCC's new rules. But Cleland argues that a very different type of legal action could engulf companies that have benefited from the use and sale of private data. Trial lawyers, he argues, will see opportunity in rounding up massive class action suits of Internet users whose privacy has been violated. What sorts of privacy abusers face legal action? Anyone who has "collected CPNI via some type of cookie," according to Cleland.

"Right now, edge providers like Google, Facebook and Twitter are at risk of being sued by trial lawyers," he said.[81]

Sounds great for consumers who care about privacy on the Internet and how it has been abused. But the FCC, Cleland was reminded, has never been a consumer advocate. "Bingo," replied Cleland. That's what makes the FCC's potential move into privacy protection so important and so surprising, he suggests.

There are other signs that the FCC under Tom Wheeler might actually become more consumer-friendly on the issue of data privacy. While Wheeler has brought some former associates from lobbying groups to the FCC, he has also peppered his staff with respected

privacy advocates. Indeed, he named Gigi Sohn, longtime president of the non-profit Public Knowledge, as Counsellor to the Chairman in April.

Another appointee with a privacy background is Travis LeBlanc, head of the FCC's Enforcement Bureau. In previous employment in California's Office of the Attorney General, LeBlanc was active in enforcing online privacy. LeBlanc has stated an interest in privacy and has already taken action against two firms that exposed personal information—including social security numbers—on unprotected Internet servers.

But many aspects of LeBlanc's approach to regulating Internet privacy under Title II remain unclear. Unfortunately, the FCC declined repeated requests to make LeBlanc available for an interview. (It also declined to answer written questions on its enforcement intentions in both privacy and cell tower infrastructure emissions.)

It remains to be seen if LeBlanc and his superiors at the FCC are really willing to take on privacy enforcement. Such a stance would require great courage as the entire Internet infrastructure is built around privacy abuse. It is also questionable whether the FCC would have the courage to challenge Google—a rare corporate ally in the battles over Net Neutrality.

Chapter Eight: Dependencies Power the Network of Corruption

As a captured agency, the FCC is a prime example of institutional corruption. Officials in such institutions do not need to receive envelopes bulging with cash. But even their most well-intentioned efforts are often overwhelmed by a system that favors powerful private influences, typically at the expense of public interest.

Where there is institutional corruption, there are often underlying dependencies that undermine the autonomy and integrity of that institution. Such is the case with the FCC and its broader network of institutional corruption.

As noted earlier, the FCC is a single node on a corrupt network that embraces Congress, congressional oversight committees and Washington social life. The network ties the public sector to the private through a frictionless revolving door—really no door at all.

Temptation is everywhere in Washington, where moneyed lobbyists and industry representatives throw the best parties and dinners. Money also allows industry to control other important factors, like the research agenda. All of this works together to industry's advantage because—as with other instances of institutional corruption—there are compromising dependencies. Policy makers, political candidates and legislators, as well as scientific researchers are all compromised by their dependence on industry money.

Dependency #1 – So much of the trouble here comes back to the core issue of campaign finance. Cable, cellular and educational tech interests know where to target their funds for maximum policy impact. And the contributions work, seemingly buying the silence of key committee congressmen—even those with past records as progressives. Key recipients of industry dollars include Massachusetts Senator Ed Markey and, until he retired, California Democrat Henry Waxman. Though they have intermittently raised their voices on such issues as data privacy and cellular health and safety, neither has shown any great inclination to follow through and take up what would have to be a long and tough fight on these issues.

Dependency #2 – Democrats might be expected to challenge industry now and then. They traditionally have done so, after all. But this is the post-*Citizens United* era where the Supreme Court has turned government into a giant auction house.

Bid the highest price and you walk home with the prize—your personal congressman, legislative loophole, even an entire political party.

Such is the case with technology industries and the Democrats. The communications/electronics industry is the third largest industry group in both lobbying and campaign contributions, according to the Center for Responsive Politics. In just 2013 and 2014, this industry sector spent well over $750 million on lobbying.[82]

Only the finance/insurance/real estate and health industries outspend the tech sector on lobbying. But those industry groups lean Republican. Over 62% of the finance/insurance/real estate campaign contributions go to the GOP. Health contributions lean Republican 57% to 43%. But the technology group leans sharply to Democrats, who got 60% of contributions in the 2013-2014 election cycle.[83] The two next largest industry groups—energy/natural resources and agribusiness—also lean heavily Republican. So of the top five industry groups whose money fuels and often tilts elections four are strongly Republican. The Democrats need the tech industry—and they show that dependence with consistent support, rarely raising such public interest issues as wireless health and safety and Internet privacy.

Dependency #3 – Spectrum auctions give the wireless industry a money-making aura. In recent Congressional testimony, an FCC official reminded legislators that the FCC has over the years been a budget-balancing revenue-making force.[84] Indeed, the auctions of electromagnetic spectrum, used by all wireless communications companies to send their signals, have yielded nearly $100 billion in recent years. The most recent auction to wireless providers produced the unexpectedly high total of $43 billion. No matter that the sale of spectrum is contributing to a pea soup of electromagnetic "smog" whose health consequences are largely unknown. The government needs money and Congress shows its appreciation with consistently pro-wireless policies.

Dependency #4 – Science is often the catalyst for meaningful regulation. But what happens when scientists are dependent on industry for research funding? Under pressure from budget cutters and deregulators, government funding for research on RF health effects has dried up. The EPA, which once had 35 investigators in the area, has long since abandoned its efforts.[85] Numerous scientists have told me there's simply no independent research funding in the U.S. They are left with a simple choice: work on industry-sponsored research or abandon the field.

Chapter Nine: A Modest Agenda for the FCC

Nobody is proposing that cell phones be banned. Nor does anyone propose the elimination of the Universal Service program or other radical reforms. But there are some steps—and most are modest—that the FCC can take now to right some of the wrongs that result from long years of inordinate industry access and influence:

1. Acknowledge that there may be health risks in wireless communications. Take down the dismissive language. Maturely and independently discuss the research and ongoing debate on the safety of this technology.

2. In recognition of this scientific uncertainty, adopt a precautionary view on use of wireless technology. Require prominent point-of-sale notices suggesting that users who want to reduce health risks can adopt a variety of measures, including headphones, more limited usage and storage away from at-risk body parts.

3. Back off the promotion of Wi-Fi. As Professor Lennart Hardell has noted, there are wired alternatives that do not expose children to wireless risk.

4. Petition Congress for the budgetary additions needed to expand testing of emissions on antenna sites. It was Congress after all that gave industry carte blanche for tower expansion so long as they comply with FCC standards. But there is evidence of vast non-compliance and Congress needs to ensure that tower infrastructure is operating within the law.

5. Acknowledge that children and pregnant women may be more vulnerable to the effects of RF emissions and require special protection.

6. Promote cable debundling as a way to lighten consumer cable bills, especially for those customers who don't care about high-cost sports programming.

7. Apply more rigorous analysis to properly assess the value of technology in education. Evidence continues to pile up that technology in education is not as valuable as tech companies claim. Pay less attention to tech CEOs—pay more attention to the researchers who've actually studied the impact of trendy technology fixes on learning

8. Take over enforcement of personal privacy rights on the Internet. Of all the basic suggestions here, this would require the most courage as it would involve challenging many of the entrenched powers of the Internet.

Chapter Ten: Stray Thoughts

Some concluding thoughts:

Why do so many of the most dubious FCC policies involve technology?

In large part, of course, because the FCC has authority over communications and that is a sector that has been radically transformed—along with so many others—by technology.

Let's be clear, though. The problem is not technology, which unarguably brings countless benefits to modern life. The problem is with the over-extension of claims for technology's usefulness and the worshipful adulation of technology even where it has fearful consequences. Most fundamentally, the problem is the willingness in Washington—for reasons of both venality and naïveté—to give technology a free pass.

Personally, I don't believe that just because something can be done it should heedlessly be allowed. Murder, rape and Ponzi schemes are all doable—but subject to prohibition and regulation. Government regulators have the responsibility to examine the consequences of new technologies and act to at least contain some of the worst. Beyond legislators and regulators, public outrage and the courts can also play a role—but these can be muffled indefinitely by misinformation and bullying.

There are precedents for industries (belatedly perhaps) acting to offset the most onerous consequences of their products. In responding to a mix of litigation, public demand and regulatory requirement, the auto industry, for example, has in the last 50 years substantially improved the safety and environmental footprint of its products.

Padded instrument panels, seat belts, air bags, and crumple zones have all addressed safety issues. Environmental concerns have been addressed with tightened emissions and fuel consumption standards. The response to new safety challenges is ongoing. Before side air bags were widely deployed, sedan drivers side-swiped by much larger SUVs were at vastly disproportionate risk of death and dismemberment.[86] But the deployment of side air bags has "substantially" reduced the risk of collision deaths.[87] Overall, auto fatality rates per 100,000 persons have dropped by nearly 60% in the U.S. since 1966.[88] Today, automakers continue to work on advanced safety features like collision avoidance.

It can be argued that most of these safety improvements came decades after autos were in wide usage and only in response to outrage at Ralph Nader's 1965 revelations on the auto industry.[89] No matter the catalysts. The simple truth remains that the auto industry—and its regulators—have for the last half-century been addressing safety and environmental issues.

But with the overwhelming application of money and influence, information and communications technologies have almost totally escaped political scrutiny, regulatory control, and legal discipline.

Should the Internet have been allowed to develop into an ultra-efficient tool for lifting personal information that includes financial records, health histories and social security numbers? Should wireless communications be blindly promoted even as new clues keep suggesting there may be toxic effects? Should local zoning authorities and American citizens be stripped of the right to protect their own health? Should education be digitized and imposed just because technology companies want to develop a new market and lock in a younger customer base?

All these questions can perhaps be rolled up in one: do we all just play dead for the corporate lobbyists and spinners who promote the unexamined and unregulated application of their products?

Finally, a word about the structure of the FCC. With five commissioners—no more than three from the same party—the structure seems to make some kind of sense.

But in practice, it works out poorly. The identification of commissioners by party tends to bring out the worst in both Republicans and Democrats. Instead of examining issues with clear-sighted independence, the commissioners seem to retreat into the worst caricatures of their parties. The Republicans spout free market and deregulatory ideology that is most often a transparent cover for support of business interests. The Democrats seems satisfied if they can implement their pet spending programs—extension of broadband wireless to depressed urban and rural schools, cell phone subsidies for low income clients. The result is a Commission that fulminates about ideology and spends heavily to subsidize powerful interests.

Perhaps one solution would be to expand the Commission to seven by adding two public interest Commissioners. The public interest only rarely prevails at the FCC. So it would represent vast improvement if both Republican and Democrat commissioners had to vie for support of public interest representatives in order to forge a majority. The public interest, in other words, would sometimes carry the swing votes.

It's very hard to believe, though, that Congress would ever approve such a plan. It simply represents too much of a threat to the entrenched political power of the two parties. Why would they ever agree to a plan that dilutes that power?

It's also worth noting that the public interest is not always easy to define. Sometimes there are arguably conflicting definitions. Still, an FCC with public interest commissioners is an idea worth consideration. It would at least require party apologists to defend how they so consistently champion the moneyed interests that have purchased disproportionate access and power in Washington.

Appendix—Survey of Consumer Attitudes

What does the public believe about the science and politics of wireless health research? Under what conditions would people change wireless usage patterns? Is the FCC currently trusted to protect public health? How would confirmation of health risks affect trust in the FCC?

These are some of the questions Ann-Christin Posten[90] and Norm Alster[91] hoped to answer with an April 2015 online survey of 202 respondents. Participants were recruited through Amazon's Mechanical Turk online platform. All were U.S. residents and had achieved qualifying approval rates in prior Mechanical Turk surveys.

Participants were asked how likely they believed the following statements to be true:

Statement 1. Prolonged and heavy cell phone use can have a variety of damaging effects on health.

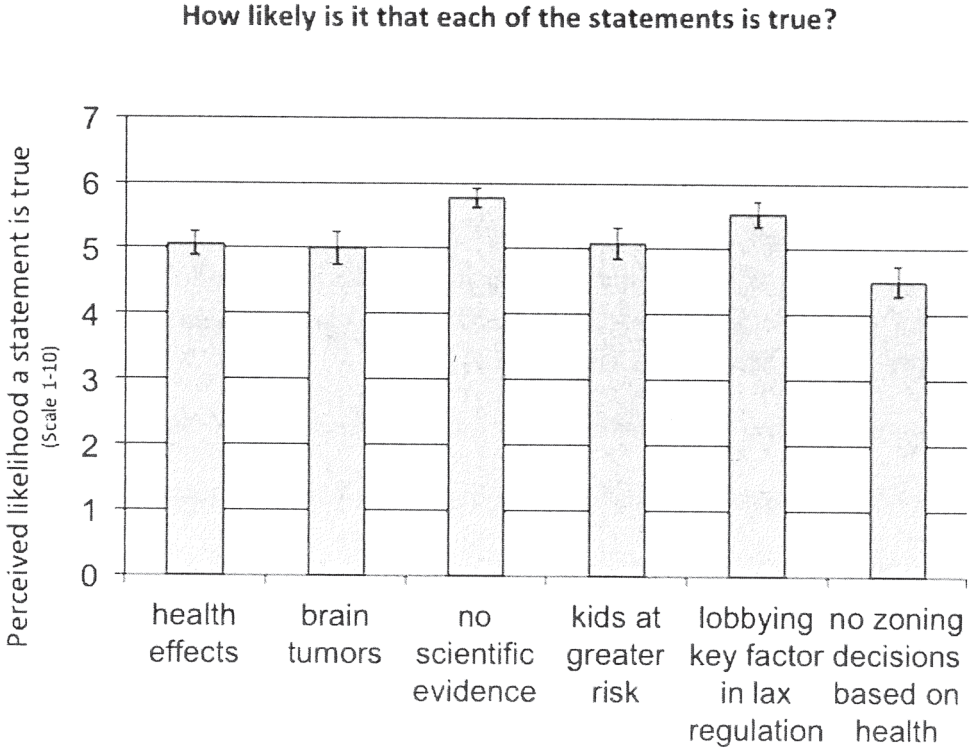
Statement 2. Prolonged and heavy cell phone use triples the risk of brain tumors.

Statement 3. There is no scientific evidence that proves that wireless phone usage can lead to cancer or a variety of other problems.

Statement 4. Children and pregnant women are especially vulnerable to radiation from wireless phones, cell towers and Wi-Fi

Statement 5. Lobbying and campaign contributions have been key factors in keeping the government from acknowledging wireless hazards and adopting more stringent regulation.

Statement 6. The U.S. Congress forbids local communities from considering health concerns when deciding whether to issue zoning permits for wireless antennae.

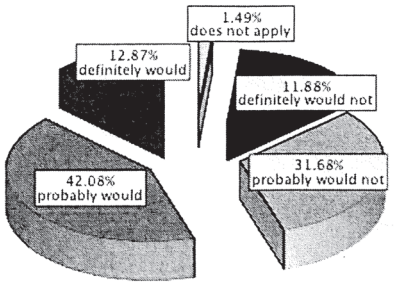


Two findings seem especially interesting:

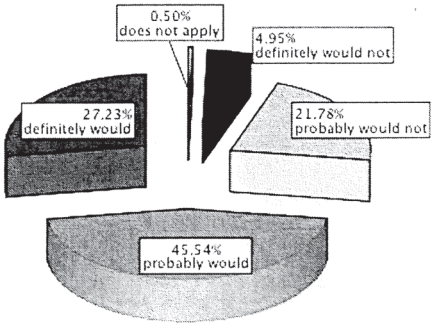
1. Statement 3 received a higher credibility rating than Statements 1 and 2. The different credibility levels are statistically significant. Respondents are more likely to trust in wireless safety than to believe there are general or specific health risks.

2. The only statement that is a matter of uncontested fact is Statement 6 on the outlawing of opposition to antenna sites on health grounds. (All other statements have been both proclaimed and denied.) And yet Statement 6 was least likely to be believed. Just 1.5% of respondents recognized this as an "absolutely true" statement. Over 14% thought this statement was "not true at all." Answers to this question would seem to reflect public ignorance on the political background to wireless health issues.

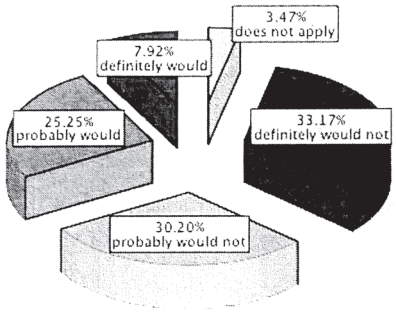
Participants were also asked how they would change behavior if claims of wireless health risks were established as true:



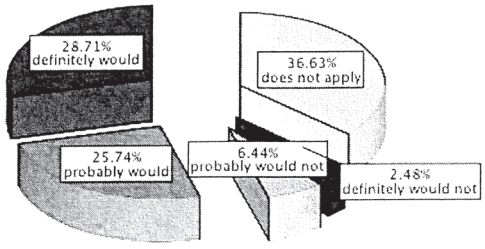
If statement 1 was true,
I would start using headphones.



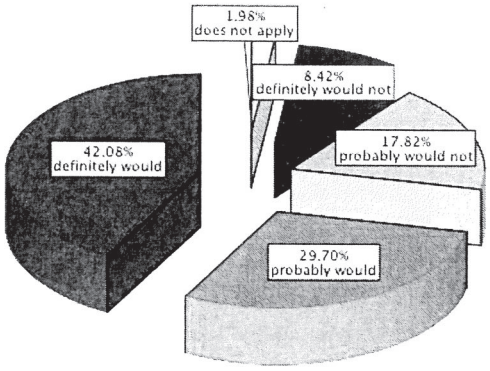
If statement 1 was true,
I would restrict the amount of time
I spend on the phone.



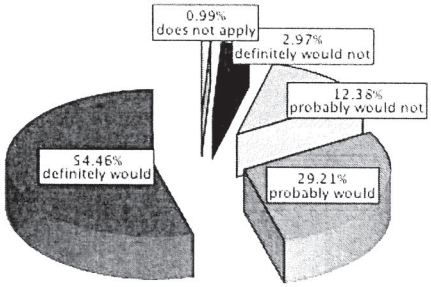
If statement 1 was true,
I would start up a new land line
account for home use.



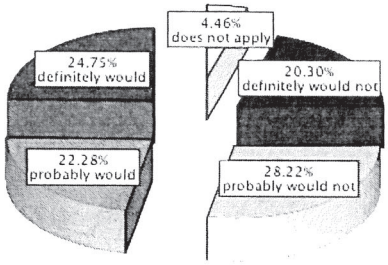
If statement 1 was true,
I would restrict my children's cell phone use.



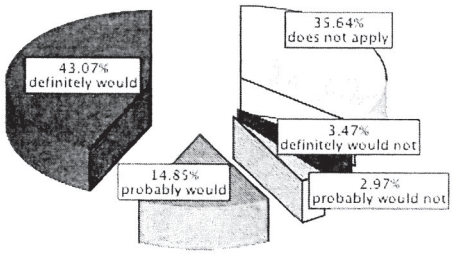
If statement 2 was true,
I would start using headphones.



If statement 2 was true,
I would restrict the amount of time
I spend on the phone.



If statement 2 was true,
I would start up a new land line
account for home use.



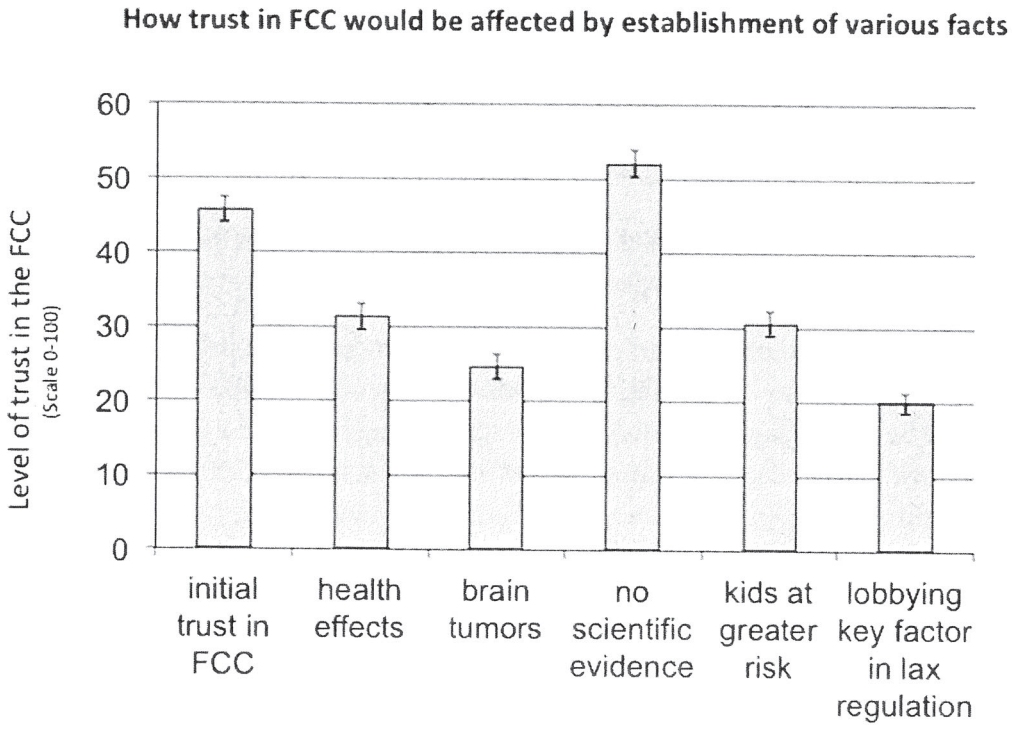
If statement 2 was true,
I would restrict my children's cell phone use.

The greatest impact on behavior came when respondents were asked to assume it is true that prolonged and heavy cell phone use triples the risk of brain tumors. More than half said they would "definitely" restrict the amount of time spent on the phone. Just over 43% would "definitely" restrict their children's phone use. Perhaps most surprisingly, close to 25% would "definitely" start up a new landline phone account. (This last response suggests it may be foolishly premature for the phone giants to exit the landline business just yet.)

The inclination of consumers to change behavior should negative health effects be confirmed suggests the stakes are enormous for all companies that derive revenue from wireless usage.

This survey points to—but cannot answer—some critical questions: Do wireless companies better protect themselves legally by continuing to deny the validity of all troublesome research? Or should they instead be positioning themselves to maintain consumer trust? Perhaps there is greater financial wisdom in listening to the lawyers right now and denying all chance of harm. If so, however, why would anyone seriously concerned about health listen to the industry—or to its captured agency? That's a question the FCC will eventually need to answer.

Trust could eventually become a central issue. Respondents were initially asked to describe their level of trust in the wireless industry and in the FCC as its regulator. Not surprisingly, establishment of any of the presumed health risks—or confirmation of inordinate industry pressure—resulted in statistically significant diminution of trust in both the industry and the FCC.



On a scale of 1 to 100, the FCC had a mean baseline trust level of 45.66. But if the tripling of brain tumor risk is established as definitely true, that number falls all the way to 24.68. If "lobbying and campaign contributions" have been "key factors" in keeping the government from acknowledging wireless hazards, the trust level in the FCC plummets to 20.02. All results were statistically significant.

It's clear that at this point confirmation of health dangers—or even of behind-the-scenes political pressures—from wireless will substantially diminish public trust in the FCC. Skeptics might argue that this gives the FCC motive to continue to downplay and dismiss further evidence of biological and human health effects. Those of a more optimistic bent might see in these findings reason to encourage an FCC concerned about public trust to shake itself loose from special interests.

Endnotes

[1] Former CTIA vice president John Walls in Kevin Kunze's documentary film *Mobilize*, introduced in 2014 at the California Independent Film Festival.

[2] November 2014 interview with Renee Sharp.

[3] December 2014 interview with Twaun Samuel.

[4] Dr. George Carlo and Martin Schram, *Cell Phones, Invisible Hazards In The Wireless Age* (Carroll & Graf, 2001), 18.

[5] Center for Responsive Politics.

[6] Id.

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[8] January 2015 interview with Newton Minow.

[9] Daniel Lathrop, "From Government Service to Private Practice: Writers of Telecom Law Move to K Street," Center for Public Integrity, October 28, 2004, http://www.publicintegrity.org/2004/10/28/6597/government-service-private-practice.

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[11] Id., 381.

[12] Id.

[13] S. Sivani and D. Sudarsanam, "Impacts of Radio-Frequency Electromagnetic Field (RF_EMF) from Cell Phone Towers and Wireless Devices on Biosystem and Ecosystem – A Review," *Biology and Medicine* 4.4 (2013): 202.

[14] Id., 206-208.

[15] January 2015 interview with Robert Weller.

[16] Letter from Michelle C. Farquhar, Chief of the FCC's Wireless Telecommunications Bureau, to Thomas Wheeler, President and CEO of the Cellular Telecommunications Industry Association, January 13, 1997.

[17] Id.

[18] Letter from FCC Chairman Thomas Wheeler to former FCC Commissioner Jonathan Adelstein, President and CEO, PCIA-The Wireless Infrastructure Association, March 14, 2014.

[19] December 2014 interview with James R. Hobson.

[20] January 2015 interview with Marvin Wessel.

[21] Id.

[22] January 2015 interview with Janet Newton.

[23] Robert Weller interview.

[24] Best's Briefing, "Emerging Technologies Pose Significant Risks with Possible Long-Tail Losses," February 11, 2013, http://www.ambest.com/directories/bestconnect/EmergingRisks.pd.

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[28] Alexander Lerchl, Melanie Klose, and Karen Grote et al., "Tumor Promotion by Exposure to Radiofrequency Electromagnetic Fields below Exposure Limits for Humans," *Biochemical and Biophysical Research Communications* 459.4 (2015): 585-590.

[29] WHO/International Agency for Research on Cancer (IARC), "IARC Classifies Radiofrequency Electromagnetic Fields As Possibly Carcinogenic To Humans," Press Release No. 208, May 31, 2011.

[30] Medscape, "Brain Cancer CME Learning Center," http://www.medscape.org/resource/brain-cancer/cme.

[31] Anke Huss, Matthias Egger, Kerstin Hug, Karin Huwiler-Muntener, and Martin Roosli, "Source of Funding and Results of Studies of Health Effects of Mobile Phone Use: Systemic Review of Experimental Studies," *Environmental Health Perspectives* 115.1 (2007): 1-4, 1.

[32] Id.

[33] Federal Communications Commission, "Wireless Devices and Health Concerns," http://www.fcc.gov/guides/wireless-devices-and-health-concerns.

[34] Lennart Hardell, Michael Carlberg, Fredrik Soderqvist, and Kjell Hansson Mild, "Case-Control Study of the Association between Malignant Brain Tumours Diagnosed between 2007 and 2009 and Mobile and Cordless Phone Use," *International Journal of Oncology* 43.6 (2013): 1833-1845.

[35] Lennart Hardell and Michael Carlberg, "Use of Mobile and Cordless Phones and Survival of Patients with Glioma," *Neuroepidemiology* 40.2 (2012): 101-108.

[36] Lennart Hardell and Michael Carlberg, 'Using the Hill Viewpoints from 1965 for Evaluating Strengths of Evidence of the Risk for Brain Tumors Associated with Use of Mobile and Cordless Phones," *Reviews on Environmental Health* 28.2-3 (2013): 97-106.

[37] Gaelle Coureau, Ghislaine Bouvier, and Pierre Lebailly, et al., "Mobile Phone Use and Brain Tumors in the CERENAT Case-Control Study," *Occupational and Environmental Medicine* 71.7 (2014): 514-522, doi:10.1136/oemed-2013-101754.

[38] October 2014 interview with Lennart Hardell.

[39] December 2014 interview with Martin Blank.

[40] Id.

[41] Norm Alster, "Cell Phones: We Need More Testing," *BusinessWeek,* August 14, 2000, 39.

[42] Quoted in American Academy of Pediatrics, "American Academy of Pediatrics Endorses Cell Phone Safety Bill," Press Release, December 20, 2012, http://www.ewg.org/release/american-academy-pediatrics-endorses-cell-phone-safety-bil.

[43] Om P. Gandhi, L. Lloyd Morgan, Alvaro Augusto de Salles, Yueh-Ying Han, Ronald B. Herberman, and Devra Lee Davis, "Exposure Limits: The Underestimation of Absorbed Cell Phone Radiation, Especially in Children," *Electromagnetic Biology and Medicine* 31.1 (2012): 34-51.

[44] November 2014 interview with Joel Moskowitz.

[45] February 2015 interview with Carl Blackman.

[46] Id.

[47] Id.

[48] Lawrence Lessig, Roy L. Furman Professor of Law and Leadership at Harvard Law School, helped to draft the Right to Know ordinance and has offered pro bono legal representation to the city of Berkeley. Professor Lessig was director of the Lab at Harvard's Safra Center for Ethics, from which the Project on Public Narrative was spun off in November of 2014.

[49] May 2015 interview with Berkeley City Attorney Zach Cowan

[50] December 2014 interview with Jerry Phillips.

[51] Id.

[52] February 2015 interview with Om P. Gandhi.

[53] Id.

[54] Radio interview on WBAI-FM, "Wireless Radiation: What Scientists Know and You Don't, With Dr. Joel Moskowitz," March 10, 2015.

[55] Spencer Ante, "Millions Improperly Claimed U.S. Phone Subsidies," *Wall Street Journal*, February 11, 2013, http://allthingsd.com/201330212/millions-improperly-claimed-u-s-phone-subsidies/.

[56] Federal Communications Commission Office of Inspector General, "Semiannual Report to Congress for the Period April 1, 2014 - September 30, 2014," 20, http://transition.fcc.gov/oig/FCC_OIG_SAR_09302014a.pdf.

[57] Federal Communications Commission, "Reports on Meetings and Telephone Calls with Registered Lobbyists Regarding General Recovery Act Policy Issues," March 2, 2010.

[58] CTIA - The Wireless Association, "Response to White House Paper on Universal Service Policy," September 19, 2014, http://www.ctia.org/docs/default-source/Legislative-Activity/ctia-usf-response-to-house-white-paper-091914.pdf?sfvrsn=0.

[59] Open Letter from Executives of 50 Leading Companies to Tom Wheeler, Chairman of the FCC, January 30, 2014, http://erate2.educationsuperhighway.org/#ceos-letter. See also David Nagel, "50 Top Execs Urge E-Rate Modernization To Propel Broadband in Schools," *The Journal*, January 30, 2014.

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[61] Jacob L. Vigdor and Helen F. Ladd, "Scaling the Digital Divide: Home Computer Technology and Student Achievement," Calder Urban Institute Working Paper, No. 48, June 2010.

[62] Mark Warschauer and Morgan Ames, "Can One Laptop Per Child Save the World's Poor?" *Journal of International Affairs* 64.1 (2010): 33-51.

[63] John Rogers, "L.A. Students Get iPads, Crack Firewall, Play Games," *Associated Press,* October 5, 2013, http://bigstory.ap.org/article/la-students-get-ipads-start-playing-video-games.

[64] April 2015 interview with Kentaro Toyama.

[65] Id.

[66] Id.

[67] FCC Chairman Tom Wheeler, quoted in Grant Gross, "FCC Approves Plan to Spend $1B a Year on School Wi-Fi," IDG News Service, July 11, 2014.

[68] Michael O'Rielly, "Dissenting Statement by Commissioner Michael O'Rielly," 2, http://e-ratecentral.com/files/fcc/DOC-328172A7.pdf, after FCC in July of 2014 voted to increase Wi-Fi spending.

[69] February 2015 interview with Charles Davidson and Michael Santorelli.

[70] Id.

[71] The University of Michigan's American Customer Satisfaction Index, http://www.theacsi.org/the-american-customer-satisfaction-index.

[72] September 2014 interview with Michael Copps.

[73] Susan Crawford, *Captive Audience: The Telecom Industry and Monopoly Power in the New Gilded Age* (Yale University Press, 2013), 212.

[74] October 2014 interview with Susan Crawford.

[75] Norm Alster, "A Little Help from the Feds," *BusinessWeek,* January 24, 2000, 42.

[76] 1992 Supreme Court decision in *Quill Corp. v. North Dakota*, 504 U.S. 298 (1992).

[77] February 2015 conversation with Jeff Chester.

[78] April 2015 interview with Harold Feld.

[79] March 2015 interview with Jonathan Mayer.

[80] April 2015 interview with Scott Cleland.

[81] Id.

[82] Center for Responsive Politics.

[83] Id.

[84] "Testimony of Jon Wilkins, Managing Director, Federal Communications Commission," Before the Committee on Energy and Commerce, Subcommittee on Communications and Technology, U.S. House of Representatives, March 4, 2015.

[85] Alster, "Cell Phones: We Need More Testing," 39.

[86] Danny Hakim and Norm Alster, "Lawsuits: This Year's Model," *New York Times,* May 30, 2004, http://www.nytimes.com/2004/05/30/business/lawsuits-this-year-s-model.html.

[87] A.T. McCartt and S.Y. Kyrychenko, "Efficacy of Side Airbags in Reducing Driver Deaths in Driver-Side Car and SUV Collisions," *Traffic Injury Prevention* 8.2 (2007): 162-170.

[88] National Highway Traffic Safety Administration, "Traffic Safety Facts 2012," 18, http://www-nrd.nhtsa.dot.gov/Pubs/812032.pdf.

[89] Ralph Nader, *Unsafe At Any Speed: The Designed-In Dangers of the American Automobile* (Grossman Publishers, 1965).

[90] Lab Fellow, Edmond J. Safra Center for Ethics, Harvard University.

[91] Investigative Journalism Fellow, Project on Public Narrative at Harvard Law School.

Please return to Vicki Simpson -
v.j.simpson13@gmail.

I'll pick this paper up to reuse when you are done.

Thanks!

SPEAKER REQUEST FORM

Submit this form to the meeting Secretary prior to the discussion item.

1) You will be called forward when it is your turn to speak

2) State your name and speak clearly into the microphone

3) Limit your comments to the time allotted

4) Provide any written materials to the meeting Secretary

5) Speakers are solely responsible for the content of their statement

Date: 4/7/26

Name: (Please Print) Debbie Neiselwander

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number: Garfield Park Concerns

Public Forum Topic (Non-agenda Item):

Please respect the order of proceedings and strictly follow the directions of the presiding officer. Behavior or actions which are loud or disruptive are disrespectful and offenders will be requested to leave.

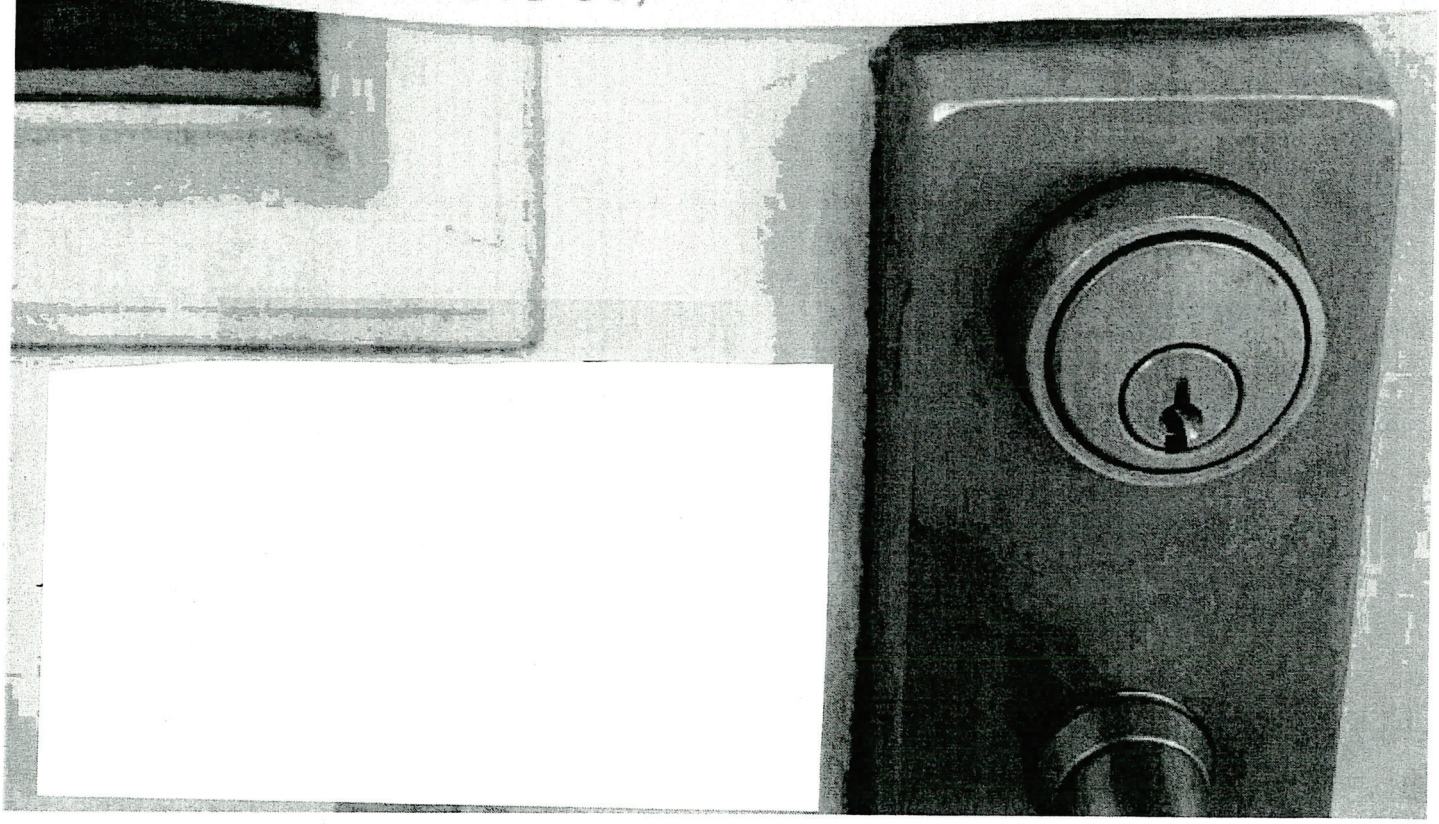
Disclaimer: By submitting this request to address the Public Body, I agree that I will refrain from the use of any obscene, vulgar, or profane language. I understand that if I do not follow procedure my speaking time may be terminated, and I may be requested to sit down or leave the building.

Debbie Neiswander

5th/E Main Severe Weather Shelter

PERMANENTLY CLOSED !

PLEASE DO NOT COME BACK. FIND SOMEWHERE ELSE TO GO, ANYWHERE BUT HERE !!



April 7, 2026

Nite Lawn/Garfield Park Concerns:

1) Immediate Changes:

- Nite Lawn Hours
  No Movement
  - Weekends
  - Holidays
  - 4:30 daily return for evening set up

- Daytime Storage

Far Side The Grove to Bike Path
(directly across from Park)
Eliminates Belongings in Park...

2) Next Step:

Find temporary location for nite lawn by Memorial Day Weekend

(splash pad opens)

3) Long Term: Mediation

resolve	Office Hours: Monday - Thursday, 9:00am - 5:00pm
	(p) 541.770.2468
	resolvecenter.org
	201 West Main Street Suite 3A, Medford, OR 97501

- Meaningful Public Engagement
- Long Term Location
- Supervision / Management

SPEAKER REQUEST FORM

Submit this form to the meeting Secretary prior to the discussion item.

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3) Limit your comments to the time allotted
4) Provide any written materials to the meeting Secretary
5) Speakers are solely responsible for the content of their statement

Date: 4/7/26

Name: (Please Print)
Cate Hartzell

Ashland Resident:
☒ YES ☐ NO City: _____

Agenda Topic/Item Number:
Garfield Park

Public Forum Topic (Non-agenda Item):
~~Garfield Park~~

Please respect the order of proceedings and strictly follow the directions of the presiding officer. Behavior or actions which are loud or disruptive are disrespectful and offenders will be requested to leave.

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Cate Hartzell

From: Cate Hartzell <cate@mind.net>
Sent: Tuesday, April 7, 2026 2:18 AM
To: 'tonya.graham@council.ashlandoregon.gov'; 'dylan.bloom@council.ashlandoregon.gov'; 'jeff.dahle@council.ashlandoregon.gov'; 'gina.duquenne@council.ashlandoregon.gov'; 'eric.hansen@council.ashlandoregon.gov'; 'bob.kaplan@council.ashlandoregon.gov'; 'derek.sherrell@council.ashlandoregon.gov'
Subject: RE: Garfield Park Safety and Security Committee

Councilors,

The letter from the Garfield Park Safety & Security Committee articulates issues that have been increasingly visible for awhile and essentially threatens the City with potential legal action. The letter is a constructive way for them to have channeled their frustration. While it's good that they have spelled out their issues and ideas, I ask the Council to recognize that it's only part of a larger reality. Council asked for alternative camping sites in September 2025. The map the Council got from staff on 11/17/25 was not the response that those of us advocating for effective solutions had hoped for. Your chief has been asking for an alternate site for awhile, to no effect.

I request that the City Council recognize that much of what they neighborhood asks for is either being done (in some cases, far more than is necessary) or can't be done. I have worked on law enforcement and civil rights issues for a long time and the letter from neighbors carries indications of how frustrated the police are with the situation, too. The City and its residents can't deport our homeless residents; we can't lock them all up in jails and concentration camps. The services offered can and should be better; if that happens, a good percentage of the issues will calm down.

I URGE Council to see the 2200 building as it's rare resource for addressing the camping needs and issues of our homeless. West Medford residents rebelled against the concentration of services in their area. Jackson Co Housing Authority deals with NIMBY with every project. Ashland HAS a significant amount workforce and subsidized senior housing. It has a very limited amount of subsidized housing for people with mental illness. Oregon's General Assistance program is **seriously** under-utilized, and I confirmed this week that it could FUND tiny house/pallet housing clusters. Contact me and I can tell you more.

Don't over-react to Garfield neighbors like the City did to 2200 Ashland St neighbors. Don't ignore either neighborhood or future neighborhoods, but expand your toolbox. Mostly, figure out the camping site immediately; rejecting Councilor Bloom's proposal doesn't mean you can't site a new place really soon. You aren't inventing the wheel. Linda Reid is a GREAT resource; tap her expertise and network.

I posted the comment below on social media. The latter paragraphs include my gentle critique of their suggestions. SOHFA and another group of advocates all agreed with Garfield neighbors about keeping the night lawn open as much as possible. We all advocated to keep it open on Easter Day to allow pressure relief. The night lawn is crowded. I understand the City's legal opinion that when it's full it's full, and Ashland has met it's legal requirements, but the humans that won't fit there will camp elsewhere, and aren't the high-capacity campers who disappear into the shadows each night.

I am an employee of Oregon Dept of Human Services; nothing I have written should be interpreted as representing ODHS; it's my personal perspective. I wrote and delivered this letter and the previous letter to Council tonight on personal time.

Respectfully,
Cate Hartzell

VVVV

suggest requiring people to rent the gazebos for $20, intentionally preventing their use by homeless people. They propose rewriting the law to prohibit storage of personal belongings in public parks while allowing day use items like coolers and chairs.
Neighbors asked to expand the no smoking area around the park. After homeless people learned the issues related to a specific area where they smoked, they moved to a different area.
Homelessness is a national issue. It's the logical result of failed policy and the division of wealth. Homelessness isn't uniform; most stories are unique, but there's often mental illness and self-medication involved. This community is full of compassionate and smart people. We have to keep innovating for solutions that ensure safety, respect the law, respect our own, others', and local government's limitations, and that respect every person's humanity.

City Councilors,

Ashland Municipal Code (AMC), the Oregon Revised Statutes (ORS) and the League of Oregon Cities all address the role of City Councilors (see below).

I respectfully ask the City Council to follow up on their 9/24/25 request to staff for a list of alternative sites for a HB3115 sanctioned camping site for homeless people. As witnessed by this week's City Council agenda and recent media regarding yet another neighborhood voicing impacts from people living on the streets, the issues of our homeless residents is controversial and volatile.

Any effort designed to bring solutions forward must be managed by officials perceived as neutral, skilled in conflict-resolution, and knowledgeable about the dynamics involved. Part of navigating conflict is building trust. While well-intentioned, Councilor Bloom's proposal that he personally manage and document a summertime, five-month, community based, identification of potential alternatives to the night lawn must not be adopted. The process outlined feels like a freight train on a track that must be opposed, especially in light of the bullying that led to its creation.

I commented in March at Council's Public Forum on the reports from 2200 Ad Hoc Committee members that Councilor Bloom demonstrated bullying behavior against members of that committee.

Councilor Bloom stated if the Ad Hoc Committee's vote didn't concur with his opinion, he would see to it that there were no more Ad Hoc Committees. The immediate impact on the small committee?

- One member changed his vote on the Committee's recommendations after feeling pressured by Councilor Bloom;
- One member asserted that their vote wouldn't change, despite the threats being made;
- One member resigned from the Committee and left that meeting after stating his impression that City officials had made up their mind and just had community members there to go through the motions. Reports from committee members that were present is that City Manager Cotta told the member he'd made his point. The member spoke again to explain his frustration, and Manager Cotta told him that if he didn't like it, he could resign.

Councilor Bloom's proposal is evidence of him making good on his threat. He has demonstrated that he is not neutral and is willing to use his power as an elected official against community members. Further, he told community members that his idea (goal?) is to create three camping areas and force homeless people to rotate around them, to distribute impact on housed residents.

I've not found a reference to Councilor Bloom being certified in facilitation or mediation. I'm unable to find references to him having worked professionally in social services and/or with homeless and mentally ill people. Per the Internet, he's been a car salesman, worked at Ashland Automotive, and currently sells go-karts. These are admirable skills, but they are not what would be required in the process he outlined. The outline itself reveals a lack of understanding of conflict resolution processes. That's okay, because he wasn't elected to facilitate large, community-wide, conflict resolution processes, nor should he.

His experience in the Associated Students of SOU included advocating for free speech (worthy cause) by accepting legal support from a Koch brothers-funded gun rights group. Conflict is complex.

The Ashland City Council is not the Jackson County Commission, where commissioners have some responsibility for County departments. Councilor Bloom's proposal would introduce a precedence for Councilors to supplant staff and start leading City projects outside the staff and Commission/Committee structure outlined in the AMC.

I express my appreciation for Councilor Bloom's "get 'er done" spirit and for hearing Ms. Neiswander's pleas to Council in March that Council follow through on its request in September 2025 for a list from staff.

These issues are important to people living on our streets, to the many volunteers involved in providing basic life support to them, and to people like me. The City Council already hears regularly from residents who don't feel heard, don't feel respected by City Council on many issues. That's tearing at the integrity of our community at a time when federal pressures mount.

In a time when national institutions are threatened, let's maintain the system of governance outlined in our governing documents.

Respectfully,

Cate Hartzell

2.04.100 Council Liaisons to City Advisory Boards and Commissions

A.1. states that "the primary role of a Council Liaison is to facilitate communication between the City advisory body and the Council. A Council Liaison shall be an ex officio nonvoting member of the advisory body, not a regular voting member..."

A.2. states City Councilors serve as liaisons to the City's regular and ad hoc advisory bodies and are expected to represent the full City Council objectively and accurately in interacting with such entities.

A.3. explains that if City Councilors attend meetings of the City's regular and ad hoc advisory bodies as a citizen, they must identify their comments as personal views or opinions and not as a representation of City Council policy.

2.04.100 C. on Deliberations clearly states: "Council Liaisons to City advisory bodies **should not attempt to direct debate, lobby, or otherwise influence the direction or decisions** of any advisory bodies to which they have been assigned. ... Undue influence over the decisions of any City advisory body shall be **grounds for removal** of a Liaison assignment as set forth in subsection H of this section.

AMC 3.08.020.A, Oregon Code of Ethics states: "the proper operation of democratic government requires that public officials, including elected officials" ... "be independent, impartial and responsible to

the people; **that governmental decisions and policy be made in the proper channels of the governmental structure" ...** "and **that the 'public have confidence in the integrity of its government**."

The League of Oregon Cities' Municipal Handbook addresses the role of City Councilors: "The extent in which the city council is involved in administration depends on the size of the city and its form of government."... "As cities grow and the complexity of their operations increase, councils often employ a city manager or a city administrator. Councils in these cities seldom retain any significant involvement in day-to-day supervision of city employees and departments..."

SPEAKER REQUEST FORM

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5) Speakers are solely responsible for the content of their statement

Date:

APRIL 7 2026

Name: (Please Print)

CLARINDA MERRIPEN

Ashland Resident:

☑ YES ☐ NO City: _____

Agenda Topic/Item Number:

~~GOVC~~

Public Forum Topic (Non-agenda Item):

GOVERNANCE

Please respect the order of proceedings and strictly follow the directions of the presiding officer. Behavior or actions which are loud or disruptive are disrespectful and offenders will be requested to leave.

Disclaimer: By submitting this request to address the Public Body, I agree that I will refrain from the use of any obscene, vulgar, or profane language. I understand that if I do not follow procedure my speaking time may be terminated, and I may be requested to sit down or leave the building.

At the March 27th meeting Tonya Graham, the mayor of Ashland Oregon said these chilling words “There is no appropriate signal if you disagree.”

In other words if you agree with us, wave your hands, but if you do not your government does not want to hear it or or even see it.

According to Wikipedia, Merriam Webster, the Holocaust Encyclopedia and many other sources, the definition of Fascism includes the “forcible suppression of opposition.” In fact, Benito Mussolini laid this out as a core tenet of his ideology in his 1932 screed the Doctrine of Fascism.

Councilors and citizens, what is the threatened arrest or expulsion from a local city meeting for expressing simple disagreement, but “forcible suppression of opposition”?

How far will the mayor take this? Already we are not allowed to make any noise, but how about shaking our heads? Will our facial expressions be monitored for disagreement? We are only allowed to smile and nod or show a blank face?

So I asked myself, what is the opposite of silently waving hands and came up with the simple, but elegant, thumbs down.

Silent but expressive, it fits within the rules of decorum, and is as disruptive as waving. Tonight and every meeting I attend henceforth, I intend to show disapproval by simply giving a thumbs down. I invite you all to join me and we will find out if we will be arrested or thrown out of this meeting for silently showing opposition.

We will find out if our government is fascist.

April 7 2026
Clarinda Merriam

ASHLAND CITY COUNCIL
SPECIAL MEETING MINUTES
Friday, March 27, 2026

I. Special Meeting

Council Present: Mayor Graham and Councilors Sherrell, Bloom, Kaplan, DuQuenne, and Hansen.
Via Zoom: Dahle.
Staff Present:

Jordan Rooklyn	Deputy City Manager
Carmel Zahran	Assistant City Attorney
Cobi Glick	Administrative Analyst

Graham called the meeting to order at 2:01 p.m.

a. Land Acknowledgement**

Graham read the land acknowledgement.

II. PLEDGE OF ALLEGIANCE

Graham led the pledge of allegiance.

III. ROLL CALL

IV. NEW BUSINESS

a. Update on City Hall Repair Requirements

Rooklyn presented an update on repair recommendations for City Hall. A summary was provided (see agenda packet) that organized recommended repairs into: immediate concerns, primary concerns (life safety but not precluding occupancy), and secondary concerns (non-life-safety items).

Immediate concerns included: a cracked roof rafter identified in a recent inspection, significant roof leaks, a non-functioning water heater, exposed electrical wiring, HVAC replacement, and pest control. Cost estimates derived from the inspection reports and adjusted for inflation were included as report-based estimates rather than actual contractor bids.

Councilors discussed whether some repairs, such as electrical concerns, could be handled in-house by City staff and sought clarification around repairs classified as life cycle issues. Completion of the rafter repair was expected for some time in May after bids close on April 6, while other safety issues still need to be addressed before full reoccupation. Rooklyn explained the order from the Fire Marshall may be lifted after the rafter repair, but high-wind or snow events were identified as ongoing concerns in the structural engineer report. Repair of the rafter would likely be covered by the facilities fund, and a suggestion was made to prioritize the City Manager's report in council meetings to enhance operational communication.

Public Comment Open

Several community members spoke on the history and importance of City Hall, highlighting its historic and symbolic significance. Concerns were expressed about past attempts to renovate the building and the need for the Council to honor it as an integral part of Ashland's heritage. Suggestions included

utilizing vacant downtown spaces temporarily, and there was a strong sentiment that City Hall should remain downtown and continue to house government services.

Public Comment Closed

b. Discussion on Use of Community Center

Rooklyn provided context: the Ashland Community Center had been closed since 2019 and recently underwent substantial renovation. Following the February 17, 2026 discovery of a cracked rafter at City Hall, the Community Center was identified as the most suitable location to co-locate displaced staff. Three legal department staff relocated to the finance building near the YMCA, and the remaining administrative staff were moved into the community center around mid-March.

Councilors discussed historic and recent Council policy decisions regarding the Community Center, including the decision to close it due to safety concerns seven years prior, to invest over $2 million in renovations, rejecting demolition recommendations, initiating community input through a Management Advisory Committee, lowering rental fees to enhance accessibility, and the decision to reopen. Repurposing the building for administrative use was discussed as a Council policy matter, and it was suggested that the Council clarify its intended use. Broader questions were raised about the city's long-term facility strategy, revenue challenges, and community engagement in discussions to inform decisions was emphasized.

It was noted that the City Manager had the responsibility and operational authority at the time of her decision to relocate, and that there was not a policy in place that restricted administrative use of the Community Center. Remote work or partnerships with local institutions for office space were suggested as interim solutions, ongoing capital maintenance challenges were discussed, and support was expressed for clear policy guidance on Community Center use to align with community priorities.

Public Comment Open

Six members of the public addressed the Council. Some supported the decision as a necessary safety measure but emphasized the need for a long-term solution for City Hall and to eventually reopen the Community Center for public use. Remote work for administrative staff was suggested and concerns were expressed that the relocation felt like a "takeover," with inadequate communication and signage that did not reflect Ashland's values. The Council was urged to prioritize public access due to its significance in the community, and it was suggested that rental revenue from public use of the facility would help offset the costs of obtaining alternative office space for administrative staff.

Public Comment Closed

Bloom moved that the Ashland City Council declare that the Ashland Community Center and Pioneer Hall are to be reserved for public, civic, recreational, cultural, meeting, and other community-serving uses, and shall not be used for general administrative office occupancy by city staff except in the event of a declared emergency; and further moved that staff return to Council with a resolution reflecting this policy by the May 5 business meeting. The motion was seconded by DuQuenne.

Roll Call Vote: Kaplan, DuQuenne, Bloom, Dahle, Sherrell — Yes; Hansen — No. Motion passed.

V. ADJOURNMENT

The meeting was adjourned at 3:27 p.m.

_____ _____

Deputy City Manager Jordan Rooklyn Mayor Tonya Graham

DRAFT

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Wednesday, March 25, 2026 4:42:01 PM

[EXTERNAL SENDER]

City Council Public Comment Form

Public Comment
Use this form to submit public comment for City Council meetings. This form must be submitted by **10 a.m.** the day of the meeting to be on the record.

If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Joan Gallagher Marks
Meeting Date	03/27/2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Number 2, Community Center Use
Comments (Leave this section blank if you are requesting to speak electronically.)	I do not want our Ashland Community Center to be used as office space for displaced city hall personnel. We have waited and waited for this space to be renovated. Community spaces are becoming more and more rare and this space holds the History of our town for gatherings, not city business. I had attended several before closure. People are more likely to attend no-host events in a neutral space as opposed to a home space.
Upload a file or image	*Field not completed.*

From: noreply@civicplus.com
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form
Date: Thursday, March 26, 2026 9:59:29 AM

[EXTERNAL SENDER]

City Council Public Comment Form

Public Comment
Use this form to submit public comment for City Council meetings. This form must be submitted by **10 a.m.** the day of the meeting to be on the record.

If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Dean Silver
Meeting Date	03/27/2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	*Field not completed.*
Comments (Leave this section blank if you are requesting to speak electronically.)	I call on a majority of Council to terminate Sabrina Cotta for cause. Begin the process on Friday, before she can do any more damage. "I move to convene an executive session to consider the continuing employment of Sabrina Cotta by the City of Ashland at the next scheduled City Council meeting." It's just that easy to get the ball rolling. One makes the motion, another seconds, and then everyone has to go on record: are they willing to consider it or not?

	This is an election year. The voters deserve to know where their Councilors stand on this essential, perhaps existential issue for the city. She has shown her unsuitability for her job, bad judgment, and insubordination again and again. The two issues under consideration at the special meeting are just the latest, and most egregious. Enough is enough.
Upload a file or image	*Field not completed.*

Email not displaying correctly? View it in your browser.

SPEAKER REQUEST FORM

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2) State your name and speak clearly into the microphone

3) Limit your comments to the time allotted

4) Provide any written materials to the meeting Secretary

5) Speakers are solely responsible for the content of their statement

Date: 3/27/26

Name: (Please Print) Bryan Holley

Ashland Resident:

☑ YES ☐ NO City: _____

Agenda Topic/Item Number: #1

Public Forum Topic (Non-agenda Item):

Please respect the order of proceedings and strictly follow the directions of the presiding officer. Behavior or actions which are loud or disruptive are disrespectful and offenders will be requested to leave.

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SPEAKER REQUEST FORM

Submit this form to the meeting Secretary prior to the discussion item.

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2) State your name and speak clearly into the microphone

3) Limit your comments to the time allotted

4) Provide any written materials to the meeting Secretary

5) Speakers are solely responsible for the content of their statement

Date: 3/27/26

Name: (Please Print)

BRENT THOMPSON

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

CITY HALL'S LOCATION

Public Forum Topic (Non-agenda Item):

Please respect the order of proceedings and strictly follow the directions of the presiding officer. Behavior or actions which are loud or disruptive are disrespectful and offenders will be requested to leave.

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Date: 3/27/26

Name: (Please Print) GAIL PATTON

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number: CITY HALL

Public Forum Topic (Non-agenda Item):

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Date: 3/27/2026

Name: (Please Print)

Linda Adams

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

IV A b cityhall → comty. center

Public Forum Topic (Non-agenda Item):

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5) Speakers are solely responsible for the content of their statement

Date:

03/27/26

Name: (Please Print)

CORI FRANK

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

b. Discussion on Community Centers

Public Forum Topic (Non-agenda Item):

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4) Provide any written materials to the meeting Secretary

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Date: 3-27-26

Name: (Please Print) Julie Akins

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number: Com Center

Public Forum Topic (Non-agenda Item):

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Date:
3/27/26

Name: (Please Print)
GAIL PATTON

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:
COMMUNITY CENTER

Public Forum Topic (Non-agenda Item):

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5) Speakers are solely responsible for the content of their statement

Date: 3/27/26

Name: (Please Print) BRENT THOMPSON

Ashland Resident:

☐ YES ☐ NO City: _____

Agenda Topic/Item Number: COMMUNITY CENTER

Public Forum Topic (Non-agenda Item):

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Date: 3/27/26

Name: (Please Print)

SHARON BRYSON

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

Community Center

Public Forum Topic (Non-agenda Item):

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Date: March 27, 2026

Name: (Please Print) Pat Turner

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

Community Center

Public Forum Topic (Non-agenda Item):

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Date: 3-27-26

Name: (Please Print) Nancy Boyer

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number: Community Center

Public Forum Topic (Non-agenda Item):

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Date:

3/27/26

Name: (Please Print)

RICK VEZIE

Ashland Resident:

☒ YES ☐ NO City: _____

Agenda Topic/Item Number:

CITY HALL

Public Forum Topic (Non-agenda Item):

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Report to the Ad Hoc City Hall Space Needs Study Committee

March 16, 1994

Subject: Existing City Hall building

By: Rick & Gayle Vezie
RICHARD VEZIE & ASSOCIATES
94 Third Street, Ashland 488-1453

THE FOUR PRIMARY ISSUES:

1. Space requirements for City Offices currently housed in or near City Hall.
2. Addressing ADA and UBC chapter 31 accessibility requirements.
3. Seismic concerns.
4. The money.

SPACE:
The Committee seems to agree that the City Departments at City Hall need additional space. Most of us agree that it makes sense for Public Works to move out to the East Main location. This however, doesn't free up much space and we still have Engineering across the street paying $1500 a month for a less than ideal location. In the mean time, the Department of Community Development (DCD) is crammed in like sardines at. City Hall. The rest of the people in the building seem to have at least a tolerable situation, as far as space is concerned. Clearly, DCD has it the worst.

How a space is utilized can be every bit as important as how much there is of it. As with the saying "a penny saved is a penny earned", using space efficiently is like acquiring additional space for free.

The existing Main and Second Floors of City Hall don't allow for the efficient use of space because they are so badly broken up. Essentially, the building is divided into two long tubes on each floor because of the two story brick wall that runs the length of the building. The tubes are further divided by various offices and compartments that were apparently fit into or added to the existing structure over time in an effort to deal with changes in use or other needs as they arose (see Fig. 1).

ACCESSIBILITY:
According to the ADA report by Darrel Ackerman, the City has a measure of "exposure" under the ADA. The final paragraph of Sheet 011 of his Facility Evaluation reads:

NOTE: This second floor houses the primary activities of the city government and is not accessible. This is discrimination under ADA Title II and is therefore **your highest exposure risk of litigation under the ADA**. These executive offices must be located in an accessible

location.

No matter what we do to the City Hall building, we will incur some cost to make the building accessible. The question is, how much? This will cause us to address some interesting questions. Do we want to do just enough to past the law? Do we want to make the building truly accessible? Do we want to arrive at some area in between? The only clear way around the Accessibility issue is to sell the building. Maybe we could get around the Helman Agreement with some legal slight of hand, but there is also the moral issue envolved of honoring the intent of an agreement.

If we decide to hold to our agreement, keep the building, and start upgrading at some level to comply with the ADA, the trail leads to the next issue, where not to be when the big one hits.

SEISMIC CONCERNS:
Unreinforced masonry buildings are a seismic nightmare. We have additional problems with the City Hall because of the additions. While some upgrading took place during the last remodel, it didn't involve all of the building. Major areas are still just old non-seismically retrofitted unreinforced masonry. A lot of it up pretty high. If you played with blocks as a child, you know what that means. This brings to the table additional questions. What should we do to try to protect the people who work in the building? What are the "reasonable" expenditures? This leads to the next issue, there's never enough money.

THE MONEY:
Now that we're looking at spending some big money, we need to address both the cost of our decisions, and what we might expect to get for our investments.

THE BEST ANSWERS:
If only we could open up the spaces in the building to allow flexibility in their uses. If there was some way to remove a bunch of the interior walls, especially the big brick wall (see Fig. 2).

The City Administrator has said on several occasions "the existing City Hall building can't support a third floor". This may be true. This led to the thinking that to try to impose a third floor on the building is all wrong. A better and simpler solution is to construct a third floor that would be mostly structurally independent of the existing building, but, along with it's support structure, would actually help support and reinforce the existing building's two floors and walls (see Fig. 3, Fig. 4, and Fig. 5). This could be done by using a system of steel columns and beams A large beam would replace the interior two story brick wall. We would also want to get rid of the two vaults which occupy and waste valuable space in the center of the building. This work could be done with much of the existing floors in place. We would have to install shear walls between some of the columns for bracing, but we would have some flexibility in their placement. Some portions of the main floor would have to opened

up to pour footings.

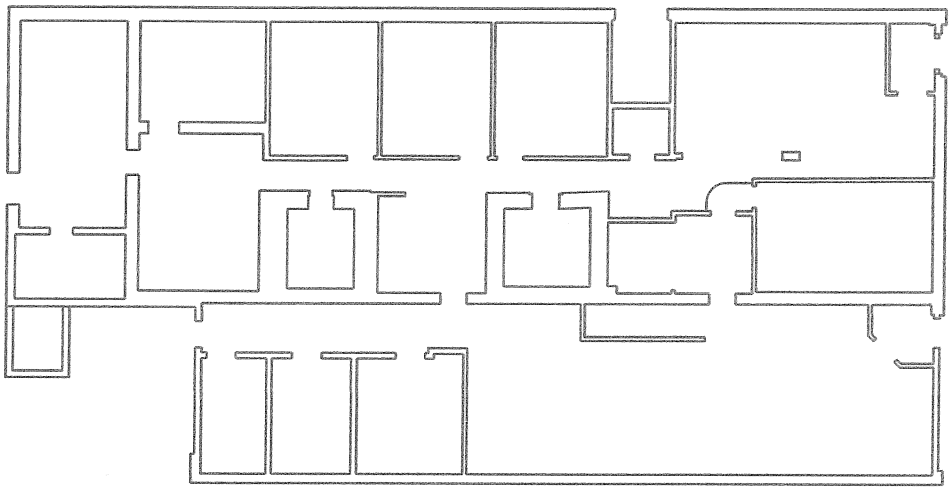
The best configuration for a third floor is to incorporate it into the roof itself as suggested by Brent Thompson, Marilyn Briggs, and others (see Fig. 5). This also provides a third floor that causes minimal visual impact on the character of the building (see Fig. 6 and Fig. 7). The elevator and stairs to the third floor pose no additional space penalty on the lower two floors as they are needed for the second floor anyway. The third floor should be of light weight construction (see Fig. 5). The roof trusses would help stabilize the existing exterior walls without imposing any additional loading on them (as with the third floor cantilevered floor trusses). We also pick up over 500 sq. ft. of storage space on the third floor at very little additional cost. We should save what we can of the last remodel on the Finance side.

What will it all cost? unfortunately, the only way to find out is to have working plans drawn up and put it out to bid. Keep in mind that we save the $1500 a month that Engineering spends on rent, and we would have expenditures for seismic and ADA upgrades to the building anyway (before we would pick up an inch of extra space). This plan provides the space the city needs right in the bulls eye of the most valuable space we own and should solve all of the issues. Of course additional time would be needed to work out the specific Space Plans and professional engineering would be required to work out the specific design.

Maybe the best news is that this project could provide us with an unique opportunity. If we were able to turn this into a "CAMPAIGN TO SAVE CITY HALL", we might be able to pull in contributions from citizens and corporations. It could provide an opportunity for our local government and it's citizens to work together. The real issue here has to do with ownership. I think Ron Roth said it best ("who is the City of Ashland?"). If we provide a chance for people to help City Hall, maybe they'll think of it as theirs.

Existing Main Floor	4272 sq. ft.	
Existing Second Floor	3169 sq. ft.	
Total Existing		7441 sq. ft.
Proposed Second Floor Addition	863 sq. ft.	
Proposed Third Floor Addition	2287 sq. ft.	
Total Additions		3150 sq. ft.
Total Floor Area		10591 sq. ft.
Additional Internal Storage	529 sq. ft.	

EXISTING MAIN FLOOR



EXISTING SECOND FLOOR

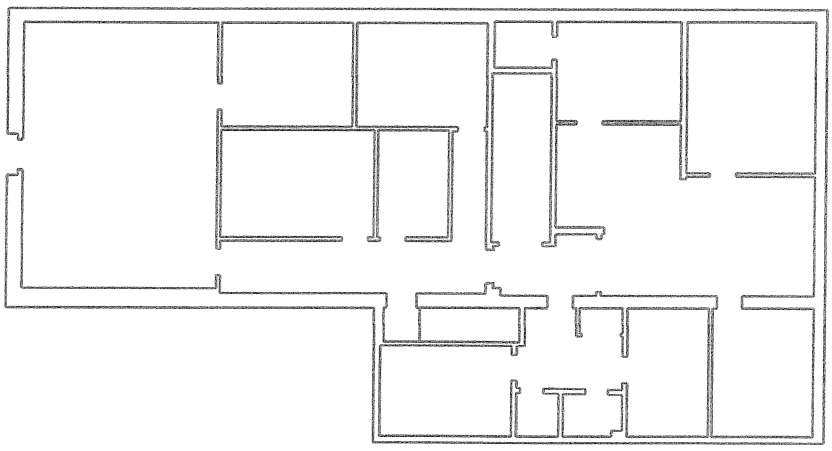


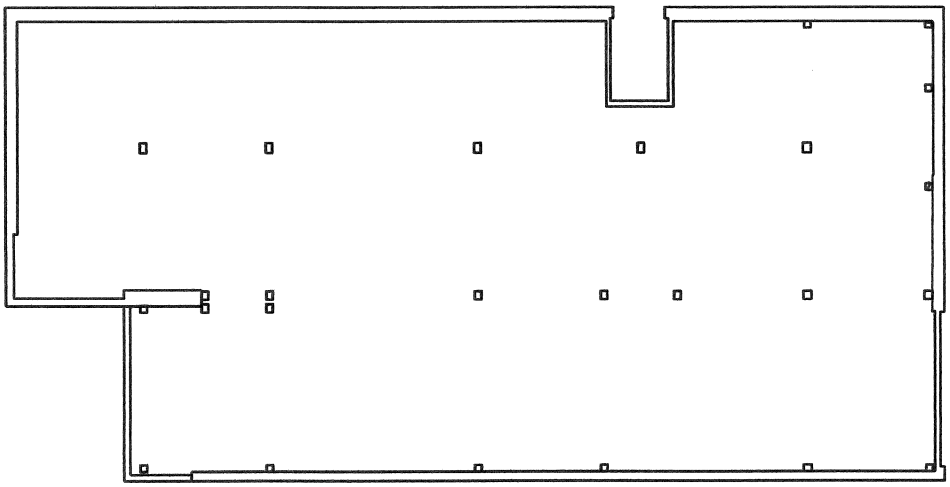
FIG. 1

DATE	
DRAWN	
JOB	
FILE	
REVISION	
SHEET	

CITY HALL

RICHARD VEZIE & ASSOCIATES
94 THIRD STREET
ASHLAND, OREGON 97520
541 488-1453

PROPOSED MAIN FLOOR



PROPOSED SECOND FLOOR

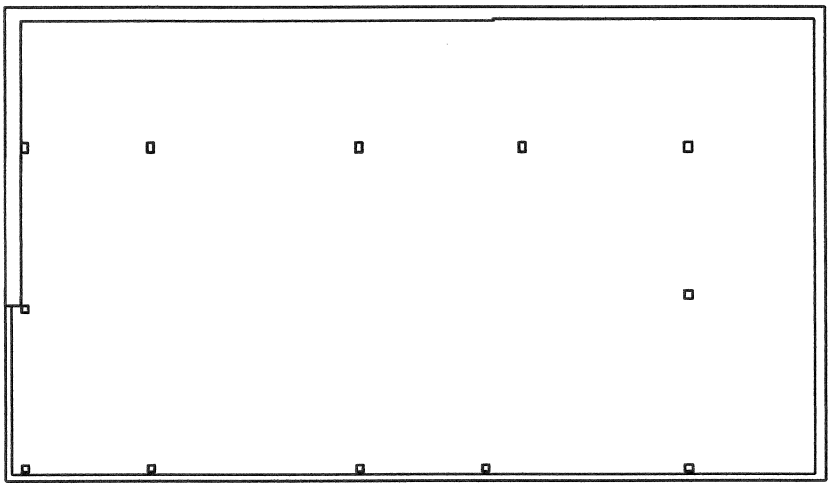
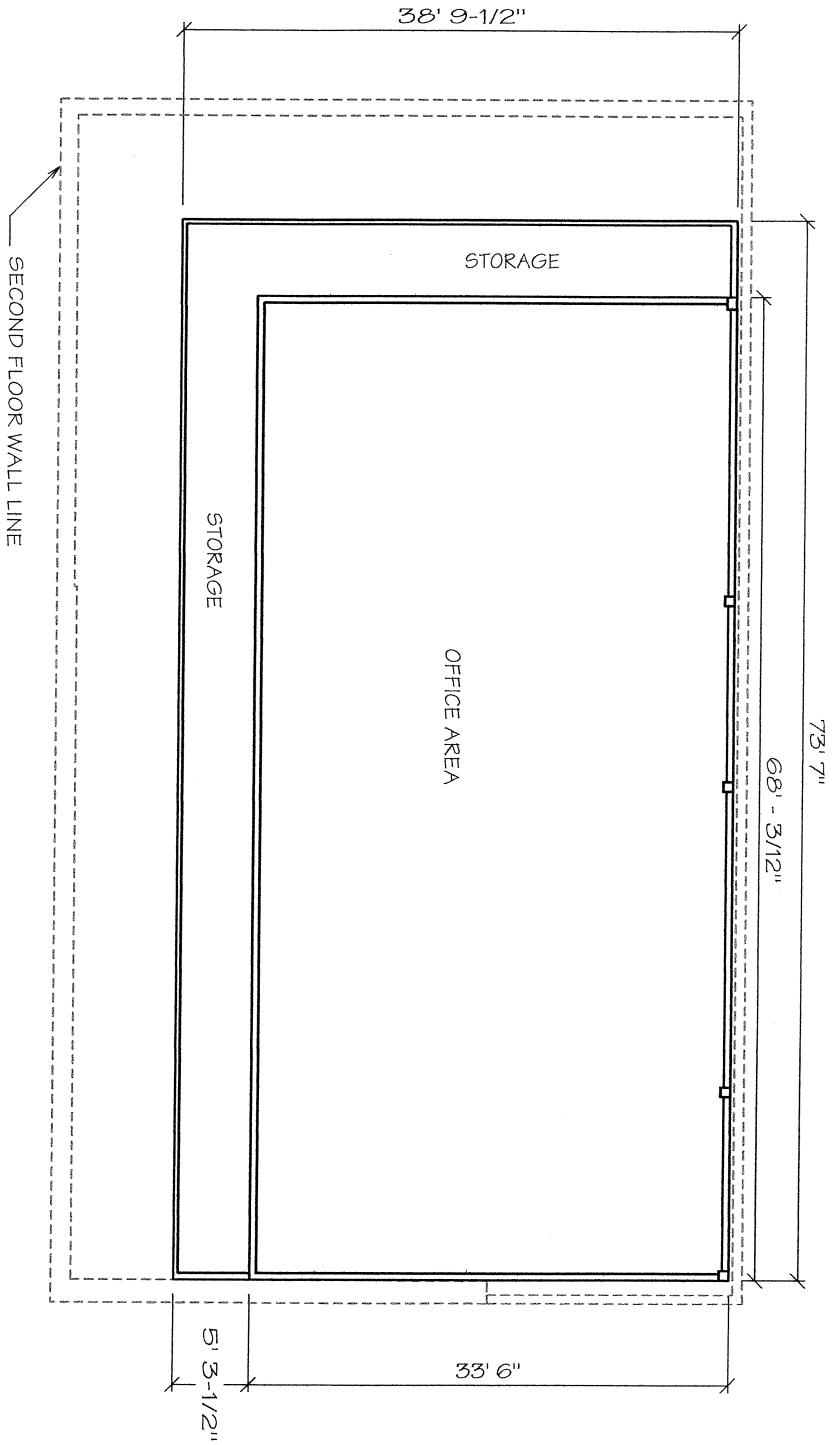


FIG. 2

CITY HALL

RICHARD VEZIE & ASSOCIATES
94 THIRD STREET
ASHLAND, OREGON 97520
541 488-1453



PROPOSED THIRD FLOOR

FIG. 3

DATE
DRAWN
JOB
FILE
REVISION
SHEET

CITY HALL

RICHARD VEZIE & ASSOCIATES
94 THIRD STREET
ASHLAND, OREGON 97520
541 488-1453

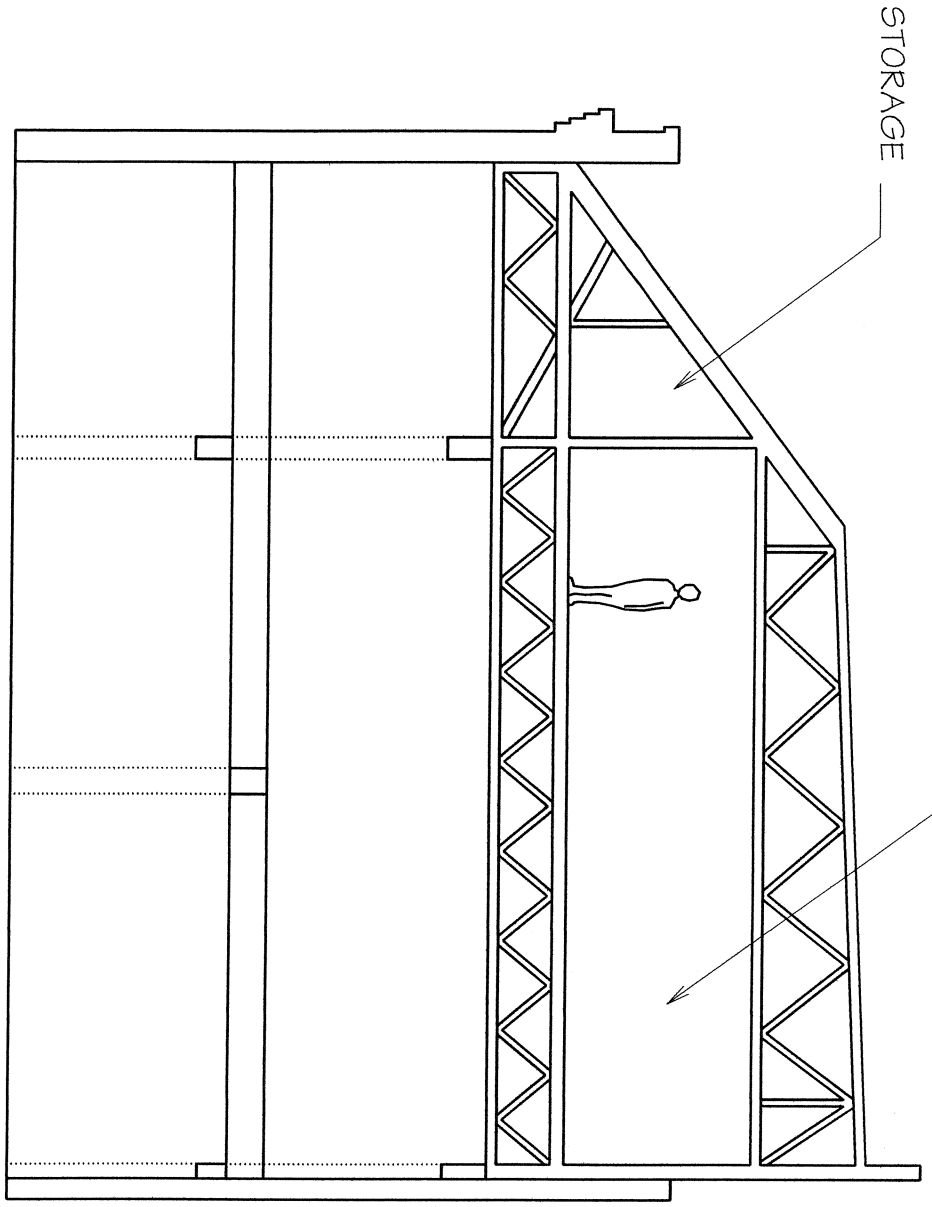
MAIN & SECOND FLOOR BEAMS & COLUMNS

FIG. 4

DATE	
DRAWN	
JOB	
FILE	
REVISION	
SHEET	

CITY HALL

RICHARD VEZIE & ASSOCIATES
94 THIRD STREET
ASHLAND, OREGON 97520
541 488-1453



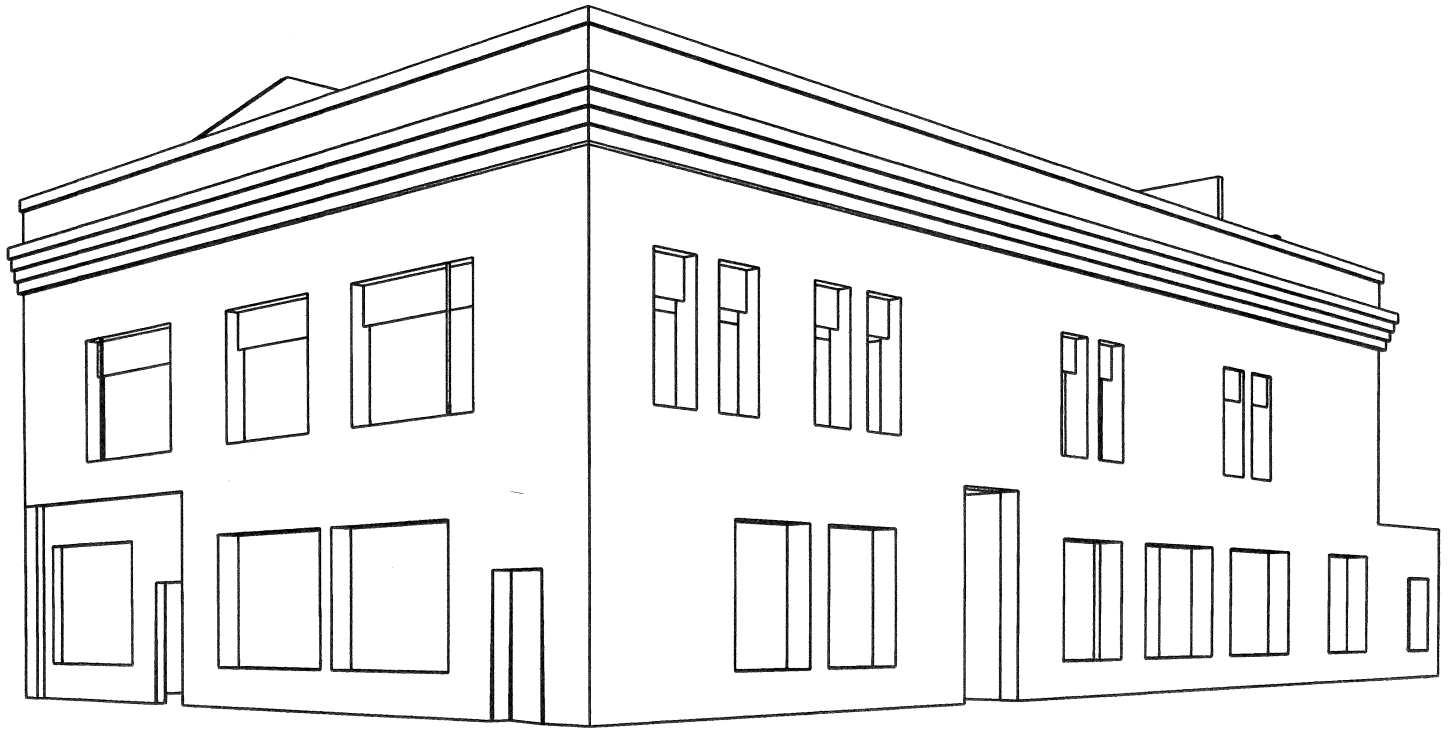
TYPICAL SECTION

FIG. 5

DATE
DRAWN
JOB
FILE
REVISION
SHEET

CITY HALL

RICHARD VEZIE & ASSOCIATES
94 THIRD STREET
ASHLAND, OREGON 97520
541 488-1453



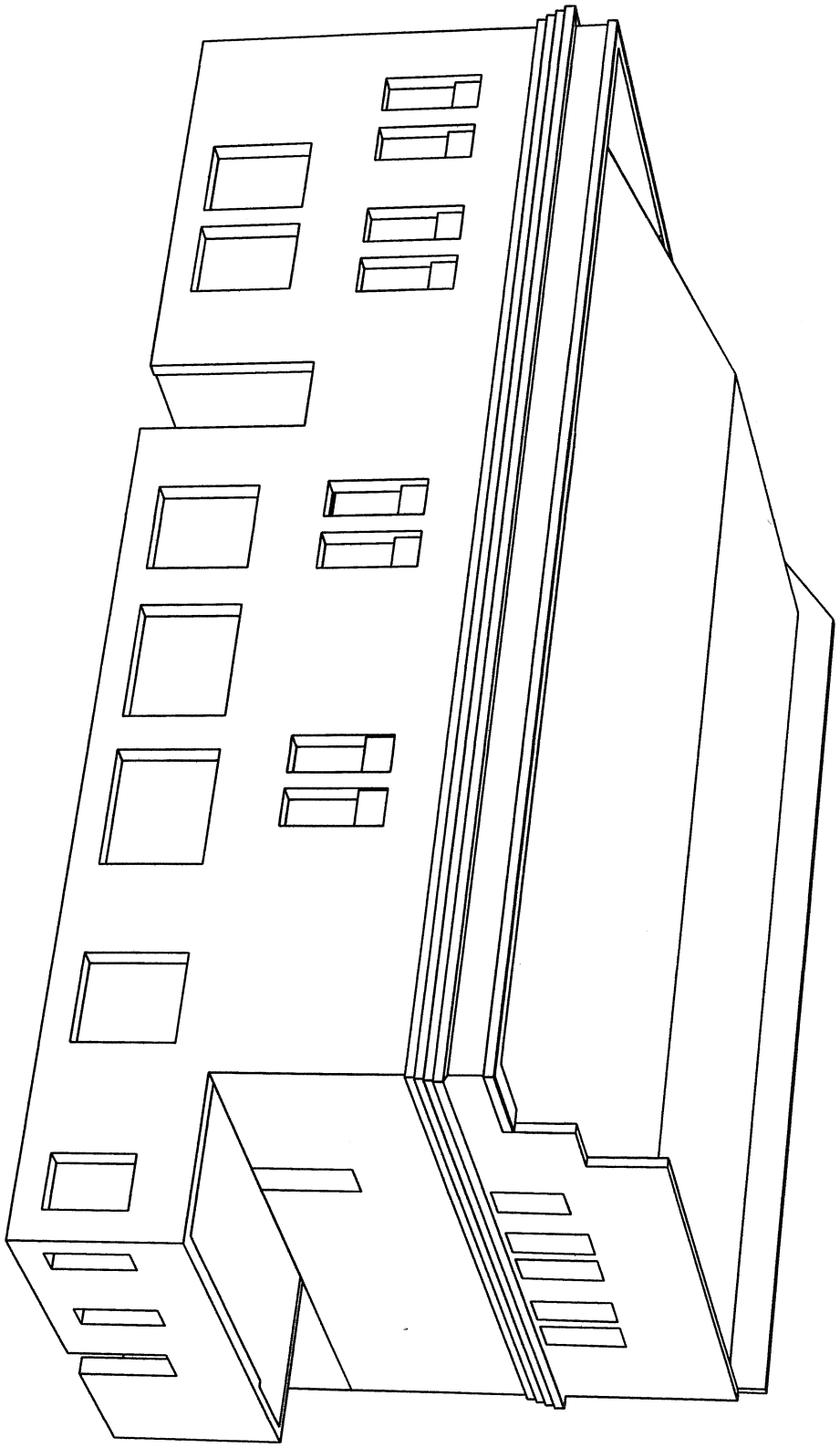
CORNER PERSPECTIVE
WITH THIRD FLOOR ADDITION

FIG. 6

RICHARD VEZIE & ASSOCIATES
94 THIRD STREET
ASHLAND, OREGON 97520
541 488-1453

CITY HALL

DATE
DRAWN
JOB
FILE
REVISION
SHEET



WEST PERSPECTIVE

FIG. 7

DATE
DRAWN
JOB
FILE
REVISION
SHEET

CITY HALL

RICHARD VEZIE & ASSOCIATES
94 THIRD STREET
ASHLAND, OREGON 97520
541 488-1453

ASHLAND CITY COUNCIL
SPECIAL MEETING MINUTES
Monday, April 13, 2026

I. Special Meeting

Council Present: Mayor Graham, and Councilors Sherrell, Bloom, Kaplan, and DuQuenne.
Council Absent: Councilor Hansen
Staff Present:

Sabrina Cotta	City Manager
Jordan Rooklyn	Deputy City Manager
Johan Pietila	City Attorney
Tighe O'Meara	Police Chief
Dan Moulin	Deputy Police Chief
John Lohrfink	Deputy Police Chief

Graham called the meeting to order at 2:32 p.m.

a. Land Acknowledgement**

Kaplan read the land acknowledgement.

II. PLEDGE OF ALLEGIANCE

III. ROLL CALL

IV. PUBLIC FORUM

V. UNFINISHED BUSINESS

a. Proposed Approach to Camping Framework and Location

Cotta introduced the item, noting it was brought back from the prior council business meeting at the request of Bloom. Police Chief O'Meara, deputy chiefs, and representatives from Opportunities for Housing, Resources, and Assistance (OHRA) were present to provide operational context.

Bloom presented his proposed multi-meeting policy framework (see agenda packet). He clarified that the process was not designed to reach a predetermined outcome, that facilitation remained the Mayor's role, and that advocates should have a defined seat at the table including the ability to submit their own recommendations directly to the Council. He emphasized the need for deliberate, sequential meetings rather than a single session and that the current meeting was intended to develop an agreed upon framework for the complex discussion rather than delving into details.

Public Comment Open

Three members of the public offered testimony related to the agenda item. Speakers generally expressed support for a structured, collaborative policy process and emphasized the importance of including homeless community members and advocates directly in each meeting rather than having their perspectives interpreted by others. One speaker suggested involving the City's Human Services Committee in the process. Another proposed consideration of Resolve, a neutral mediation organization with relevant local experience, as a potential facilitator.

Public Comment Closed

Council discussion on scope and process: The Council confirmed unanimous support for undertaking a formal policy process. Discussion centered on whether the scope should be limited strictly to the Night Lawn or broadened. It was clarified that the intent was not to expand to the entire homelessness services landscape, but to ensure that questions of site management and daytime access for Night Lawn residents were addressed alongside the question of location. The Council reached consensus that the process should include interrelated policy questions: (1) the vision and intended purpose of a designated camping space, (2) site location, (3) operational management standards, and (4) daytime options for Night Lawn residents.

Pietila provided background on the legal framework, noting that the City's camping ordinance and the Night Lawn were established in response to the need to legally enforce restrictions on camping in the public right-of-way. He referenced Blake v. City of Grants Pass and Bilodeau v. City of Medford as the controlling case law under which cities must demonstrate "objectively reasonable" steps — including providing alternative locations and partnering with housing opportunities — in order to enforce such ordinances.

Operational concerns raised by staff and subject-matter experts: O'Meara urged the Council to revisit the expanded Night Lawn hours adopted at the prior meeting, warning that allowing near-continuous occupancy risked repeating prior problems including significant pest infestations, physical degradation of the site, and potential legal obligations arising from the precedent set by expanded services. He recommended reverting clearance hours to 7:30 AM and 4:30 PM, respectively. Dan Cano, Executive Director of OHRA, noted that a percentage of the unhoused population would always resist congregate shelter options and cautioned against increased management which could lead to increased liability. He emphasized the importance of meeting basic needs — sanitation, storage access, transportation — while keeping the space from becoming a permanent encampment. Cotta noted that the primary concern from advocates was the daily clearance window, rather than weekend or holiday flexibility, and requested that the daily hours be revisited.

Pietila advised that because the hour change was enacted by formal Council vote, a motion to reconsider would be required and could not properly be entertained at this special meeting given its limited noticed scope. The Council directed that the Night Lawn hours question be formally noticed and brought back for discussion at the April 21 regular meeting, at which point advocate and neighborhood feedback would also be received.

Path forward: The Council directed staff to schedule a dedicated study session on May 18 as the first meeting in the policy process. That session will serve as a level-set and will include: a legal briefing from the City Attorney on the camping ordinance framework and applicable case law; a presentation on the history and lessons learned from the Night Lawn; a map of City-owned properties; a financial overview of current expenditures and budgeted resources; and preliminary discussion of process scope and structure. Consideration was given to inviting Resolve (a neutral mediation organization), the Housing and Human Services Advisory Committee, and other subject-matter experts such as library staff to participate in or inform the process. The Council also noted that the Housing and

Human Services Advisory Committee's prior homeless services assessment could provide a useful foundation, and that councilors may attend that committee's public meetings in an observational capacity. Staff was directed to keep the May 18 session focused on orientation and scoping, with subsequent meetings to be scheduled based on the direction that emerges from that first session.

VI. ADJOURNMENT

Bloom moved to adjourn. Seconded by DuQuenne
All Ayes. Motion passed.
The meeting was adjourned at 4:13 p.m.

_____ _____

Deputy City Manager Jordan Rooklyn Mayor Tonya Graham

DRAFT

Kerrick Gooden

From: noreply@civicplus.com
Sent: Saturday, April 11, 2026 11:02 AM
To: Ashland City Recorder
Subject: Online Form Submittal: City Council Public Comment Form

Follow Up Flag: Follow up
Flag Status: Flagged

[EXTERNAL SENDER]

City Council Public Comment Form

Public Comment

Use this form to submit public comment for City Council meetings. This form must be submitted by **10 a.m.** the day of the meeting to be on the record.

If you wish to speak to the Council in person at a meeting, you must fill out a Speaker Request form available on-site. Do not use this form.

Full Name	Cathy Lemble
Meeting Date	Monday, April 13, 2026
Email Address	[redacted]
Are you a City of Ashland resident?	Yes
Indicate if you want to provide written testimony, or if you want to speak via Zoom.	Written
Which agenda item would you like to address?	Issues related to daytime activities of night lawn users/homeless population
Comments (Leave this section blank if you are requesting to speak electronically.)	I am fully supportive of the efforts of community members to restore Garfield Park to a safe, clean family-friendly space. I want to add that the issues that are occuring there are not limited to Garfield Park. Other Ashland parks, and notably, the Ashland Public Library have also been impacted. I have been very upset to experience the shift in the library from a space

	that invites families, young children, and seniors to linger to a space that serves as a community hub for services to the homeless. These services are needed, but I do not think that it is safe or appropriate for the library to house them. I believe that it is essential for the city to designate a building, staffed with people who have the needed training in social service work, to provide a community food pantry and the other services that the library currently provides. (Including indoor seating, outlets to charge phones, storage for belongings, trash and recycling bins,and a designated companion animal area.) Sadly, I've simply begin to avoid the parks that my kids grew up using and that I spent 20+ years enjoying with kids in my summer camp programs. As a lifelong voracious reader and great appreciator of libraries as "clean well-lighted spaces for books" I want to advocate strongly for including the library in this conversation. Additionally, I feel that homeless people need to be held to the same standards of behavior one would expect any community member to abide by. We cannot ignore their needs and we also need to protect our precious shared community spaces.
Upload a file or image	*Field not completed.*

Email not displaying correctly? View it in your browser.

Council Business Meeting

Date: April 21, 2026

Agenda Item	Public Hearing on 2026–2027 Community Development Block Grant (CDBG) Award and Action Pla
Department	Community Development
From	Linda Reid, Housing Program Manager

TIME ESTIMATE
30 Minutes

CATEGORY
Action Needed - Motion to approve an action

SUMMARY
The Council is requested to award Community Development Block Funds.

The City of Ashland is expecting a total of **$162,636** in Community Development Block Grants (CDBG) for the 2026 Program Year. Of that amount the City is offering **$138,608** in CDBG grant funds for award to eligible projects that support the goals identified in the 2025-2029 Consolidated Plan for the use of CDBG funding. The City of Ashland may not receive final notification of the annual CDBG award amount from the Department of Housing and Urban Development until after awards have been made. The estimate is included to provide guidance to applicants regarding the expected amount of available funds. The City will reserve the right to award more or less than this estimate depending on the final entitlement amount authorized by Congress and the Department of Housing and Urban Development.

Under CDBG regulatory limits only 15% of the anticipated 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 2025 amount of funding available for award to capital improvement projects is approximately **$138,608**.

POLICIES, PLANS & GOALS SUPPORTED

- 2025-2029 Consolidated Plan 5-year strategic plan for the use of community development block grant (CDBG) funds.
    1. https://ashlandoregon.gov/DocumentCenter/View/3924/Revised-2025-2029-CDBG-Consolidated-Plan

BACKGROUND AND ADDITIONAL INFORMATION
The City of Ashland has received an application for the public service funding offered.

Organization	Proposed Project	CDBG Funds Requested	Goal	Consolidated Plan Goal
Maslow Project	Encourage stability, self-sufficiency, and school achievement for homeless youth. ***Public Service**	$18,000	Homeless Goals: Provide access to basic needs, information, and referral. Provide case management and housing to improve stability to approximately **100** identified homeless youth ages 0-24.	Public service activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted 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.

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

HOUSING AND HUMAN SERVICES ADVISORY COMMITTEE RECOMMENDATION
The Housing and Human Services Advisory Committee reviewed the applications and made a fund recommendation at their regular meeting on March 26th. The Housing and Human Services Advisory Commission Recommendation is as follows:

- Motion to fully fund Maslow Project at the requested amount of $18,000.

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

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS
I move to award the competitively available 2026 Community Development Block Grant funds as follows: $18,000 to the Maslow Project Public Service Project; and

Any remaining balance of CDBG funds not awarded will be incorporated into the next budget allocation process.

REFERENCES & ATTACHMENTS
1. CDBG Evaluation HHSAC_03262026
2. 2026 Maslow PS Application_Redacted

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.

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

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,

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,

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

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 (QMHAs), 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 (QMHAs). Advocates remove barriers and connect homeless clients to essential services.

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

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

Total cost of this project is $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	*This request*	
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
Medford, OR 97501
(541)773-3619 (work)
(541)326-1097 (cell)
jamiehazlettesq@gmail.com
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

HAJC | HOUSING AUTHORITY of JACKSON COUNTY

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 log-term outcomes. Maslow is one of the few organizations offering housing supports to this growing and priority population in our region.

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

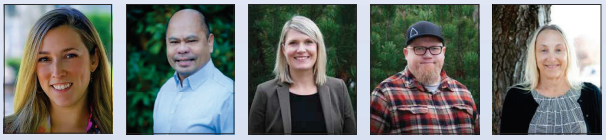
We encourage the City of Ashland to support Maslow Project's application for Community Development Block Grant funds to support their Wrap-Around Case Management program.

Sincerely,

Cara Carter

Cara Carter
Director of 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

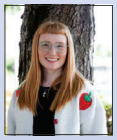
Nicole Ritterbush
Staff Supervisor
Housing & Outreach

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

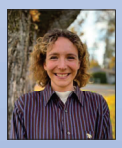
Ben Herman
DCT Case Manager

Nicole Hoefflinger
School-Based Lead
& Case Manager

Maribel Garcia
Housing Case
Manager

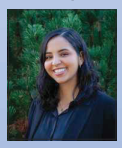
Adriano Martinez
Intake & Outreach

Ayden Moore
Bookkeeper

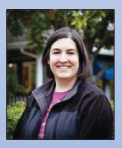


Meredith Morgan
Community
Engagement Specialist

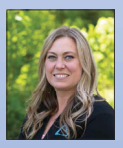
**Mauro Reyes
Lopez**
Case Manager



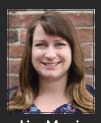
Aris Rivera
Data Specialist



Casey Stine
Case Manager &
Outreach

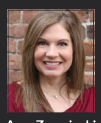


Brandy Stromme
Team Lead &
Case Manager



Lisa Morris
Chair

Sara DeVries
Vice Chair



Amy Zarosinski
Treasurer

Sharilyn Cano
Secretary

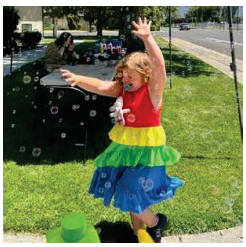
Jamie Hazlett
Member

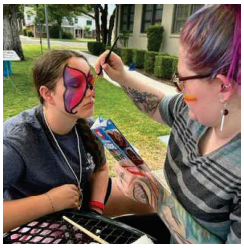
Ray Hetzer
Member

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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20 Our Future: *A New Home, Bigger Impact*

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

2000

How it Started

Our founder Mary Ferrell worked as the Medford SD Homeless Student Program Coordinator. Seeing gaps in services, she drove around looking for youth to help, carrying supplies in her van and stopping at schools and local agencies.

2004

Building a Network

People joined the cause! Local clubs, teachers and churches started hosting donation drives for school supplies, food, hygiene, clothes and diapers.

2007

Naming of Maslow Project

Our first Resource Center opened inside the Kids Unlimited building, expanding service offerings. One teen observed that our efforts to stabilize youth so they could reach higher goals was much like Maslow's Hierarchy of Needs, and he named us Maslow Project.

2009

Maslow Achieves 501c3 Status

A big year: we gained our nonprofit status, moved into our own building in downtown Medford, and won a National Award for service to homeless youth & families, attracting media from around the globe including 20/20, MTV, and the *New York Times*.

2011-2012

Expanding Jackson County Reach

With a permanent home in the old Medford SD headquarters, Maslow was able to focus on reaching needs across Jackson County — expanding services, outreach efforts and partnerships

2016

Serving Josephine County

Maslow expanded services to Josephine County — offering school-based services, outreach to rural communities and a Resource Center.

2018

Student Success!

The start of our Student Success program allowed us to work with students beyond crisis intervention and stabilization. Our skilled providers help students find success in school, explore skills and interests, and pursue postsecondary goals with annual average graduation rates of 90% or better!

2019-2020

Permanent Supportive Housing

Maslow began our exciting partnership with the Housing Authority and DHS, providing our families with permanent housing. The program includes case management to build self-sufficiency through education and employment.

2020-2023

Covid-19, Wildfires & State Housing

Oregon Governors prioritize affordable housing and rental assistance in response to the pandemic and wildfire emergencies. Maslow expands housing efforts by nearly $1M/year.

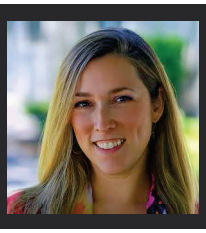
2024-2025

25 Years of Service!

We purchased our Cardley campus building, the future home of the Jackson County Resource Center. We also opened our first dedicated Youth Housing and started piloting a "universal income" Direct Cash Transfer program for youth and families.

25 Years of Hope

A Conversation with Mary Ferrell, Founder of Maslow Project



How did this journey begin for you?

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.

How did Maslow Project officially get its name?

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!

How has Maslow Project grown over the past 25 years?

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.

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

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.

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

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.

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

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.

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

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.

How do you measure success at Maslow Project?

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.

Looking back, what are you most proud of accomplishing?

Creating a 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.

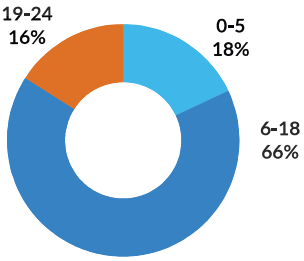
What's your vision for Maslow Project's next 25 years?

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.

*Oregon Department of Education SY23-24 data

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

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!

S+B JAMES CONSTRUCTION

Jackson Care Connect

SES

allcare health

FatKidFoodCo.

GRANTS PASS BARBER SHOP

propel INSURANCE

ROGUE CREDIT UNION

SOUTHERN OREGON PEDIATRICS

STORAGE NEAR ME LOCK N KEY SELF STORAGE

Timber Products

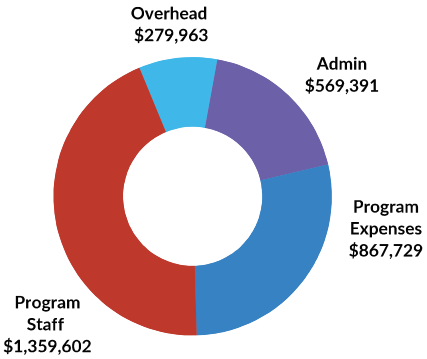
Confident Cutz

GRANTS PASS TOYOTA

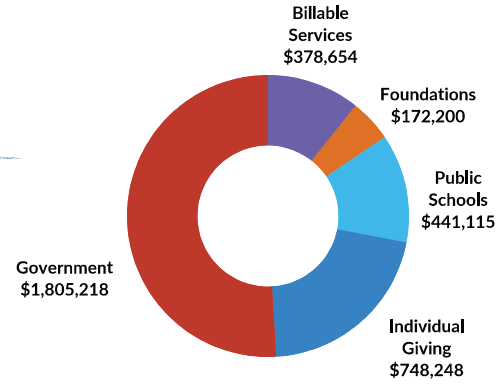
Financials

Transparency + Accountability

Expenses

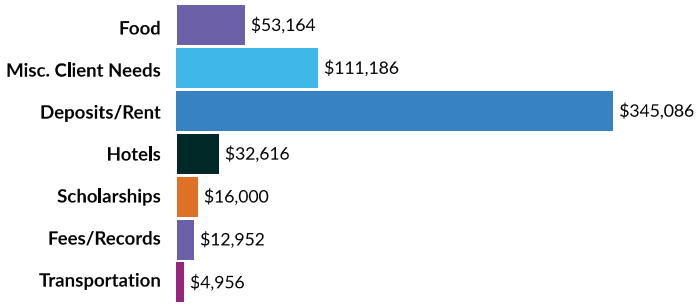


Revenue



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
- Larger common area that is safe & welcoming
- Communal dining space
- Clothing closet
- Maslow Cafe, to provide youth with work experience opportunities
- Commercial kitchen for food preparation
- More private office space for case managers and admin *(much needed!)*

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.

Council Business Meeting

Date: April 21, 2026

Agenda Item	Resolution Approving a Supplemental Budget
Department	Finance
From	Bryn Morrison, Deputy Finance Director

TIME ESTIMATE
15

CATEGORY
Action Needed - Motion to approve an action

SUMMARY
This agenda item is to approve a supplemental budget reducing contingency in the General Fund to increase expenditure appropriation in the Capital Improvement Fund.

POLICIES, PLANS & GOALS SUPPORTED
Administrative/Governance Goal:

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

BACKGROUND AND ADDITIONAL INFORMATION
The City Council approved a contract with Outlier Construction LLC for the rehabilitation of the Community Center and Pioneer Hall June 4, 2024 for $1,722,490. During the rehabilitation, Outlier Construction identified additional structural issues with the Community Center that needed addressing. Staff identified three options for moving forward and these details were presented to the Management Advisory Committee(MAC). The MAC recommended to the City Council option 1: to continue to rehabilitate the Community Center under the original design intent with modifications as presented in the staff report attached. The City Council approved moving forward with option 1 rehabilitation under the original design intent with minor modifications as shown in the minutes attached.

The total cost for the completion of the rehabilitation of Pioneer Hall and the Community Center was $1,043,860 and $1,363,359 respectively totaling $2,407,219. The total budgeted in the Capital Improvement budget for BN 2025/27 was $758,634 to complete the remaining rehabilitation. Due to unforeseen circumstances that were not known during the preparation of the budget, an additional amount of $200,000 is requested in this supplemental budget as a transfer from the General Fund contingency. Contingency was not budgeted in the Capital Improvement Fund due to the minimal expenditures assumed for this biennium and per policy, would not have been adequate to cover this overage. Although the fund is not in budgetary violation for the biennium, the fund balance is currently negative and cannot remain negative at the end of the fiscal year. $720,000 was previously transferred in May 2025 from the General Fund, Facilities budget to the Capital Improvement Fund for the rehabilitation of these two structures.

Capital Improvement Fund

	Fiscal Year 2026 1st Year Actuals	Fiscal Year 2026 1st Year Adjusted
Interest on Investments	$ 6,238	$ 6,238
Transfer In (General Fund)	200,000	400,000
Total Revenues and Other Sources	206,238	406,238
Public Works - Capital Outlay	722,336	722,336
Total Expenditures and Other Uses	722,336	722,336
Excess (Deficiency)of Revenues and Other Sources over Expenditures and Other Uses	(516,098)	(316,098)
Beginning Fund Balance	372,739	372,739
Ending Fund Balance	**$ (143,359)**	**$ 56,641**

Authorized by ORS 294.473, a supplemental budget is presented to Council and a public hearing is required as the amount in change of the appropriation in the Capital Outlay category in the Capital Improvement Fund is greater than 10%.

FISCAL IMPACTS

Reduces contingency in the General Fund $200,000 and increases appropriation in the Capital Improvement Fund $200,000.

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move approval of Resolution 2026-03 approving a supplemental budget and budget appropriation adjustments for the 2025-2027 biennial budget period beginning July 1, 2025.

REFERENCES & ATTACHMENTS

1. 2024-06-04 Council Mtg MIN Approval of Outlier Construction contract
2. 2024-12-17 City Council Community Center
3. 2024-12-17 Council Mtg MIN
4. 2025-17 Adopt the Biennium 2025-2027 Budget and Appropriate Such Amounts as Necessary to Implement
5. Resolution 2026-03 Approving Budget Supplementals and Appropriation Adjustments Public Hearing

ASHLAND CITY COUNCIL
BUSINESS MEETING MINUTES
June 4, 2024

I. CALL TO ORDER

Mayor Tonya Graham called the meeting to order at 6:05 pm.

1. Land Acknowledgement**

Councilor Kaplan read the land acknowledgment.

II. PLEDGE OF ALLEGIANCE

Councilor Hyatt led the pledge of allegiance.

III. ROLL CALL

Mayor Graham, Councilors Hyatt, Dahle, Kaplan, DuQuenne and Hansen were present. Bloom was absent.

IV. MAYOR'S / CHAIR OF THE COUNCIL ANNOUNCEMENT

Graham announced that fire season has begun (June 1, 2024) and referred residents to the new website for information on how to prepare one's home and property for wildfire prevention and for evacuation.

1. Flag Day Proclamation

Mayor Graham read the proclamation into the record.

V. APPROVAL OF MINUTES

1. Minutes of the May 20 - Study Session Meeting
2. Minutes of May 21 - Business Meeting

Councilor DuQuenne/Dahle m/s approve the minutes.
Roll Call Vote: Councilors Hyatt, Kaplan, DuQuenne, Dahle and Hansen, YES. Motion passed.

VI. SPECIAL PRESENTATIONS

VII. CITY MANAGER REPORT

Cotta announced the new website launched May 22, 2024, with ongoing updates. All committee information will be moved to Laserfiche. The June 2024 Newsletter has been published. the City will be looking for a new Band Director as the current director has taken another position. Call for artists is out for a decorative crosswalk that will be near the entrance to Lithia Park. Fire Season began June 1, 2024 and it is expected to hotter and drier this summer- please see the website for tips on ways to prepare.

VIII. **PUBLIC FORUM**

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

Paul Mozina/Ashland - Mozina spoke of the recently amended telecommunications ordinance. He found no consideration of the health and safety impacts of RF radiation where sensitive people tend to congregate.

Jackson Bangs/Medford - Spoke in favor of the Ashland Climate and Clean Air Policy Package. He urged the City to include a carbon pollution fee for connecting new homes to gas hookups, a low nitrogen oxide emission standard for appliances in new homes, a provision to stop the expansion of new gas pipes in rights of way by the end of 2025 when the franchise agreement with Avista is up for renewal.

Jacki Rosen/Ashland - Spoke in support of the Climate and Clean Air Policy Package. Rosen urged the Council to direct City staff to draft policy language for each element of the package for the August 5, 2024, study session.

Flavia Franco/Ashland - Spoke in support of the Climate and Clean Air Policy Package. Franco mentioned the Green Energy Institute has already drafted language so the City does not have to start from scratch.

Sitka Moss/Trail - Moss asked again for a resolution for a ceasefire in Gaza and asked for passage of a resolution by Council to consider and talk about these issues.

Ancient Hatfield/Ashland- Spoke in favor of a resolution for a ceasefire in Gaza. Hatfield asked the Council to join the rest of the world in saying this genocide must end now by creating a resolution or receiving help to draft one.

Tony Foster/Ashland- Foster read from section 1091 of Title 18, United States Code that prohibits genocide into the record. Foster encouraged the City to pass a ceasefire resolution along with the International Criminal Court and the International Court of Justice.

Gavin Borgias/Ashland- Spoke in favor of a ceasefire resolution. Borgias spoke that this genocide has gone on long enough without opposition from the highest levels.

CONSENT AGENDA

1. Recology Resolution
2. Affordable Childcare Ad Hoc Committee Appointment
3. Liquor License Approval for Cafe Lumina LLC
4. Liquor License Approval for Rogue Valley Roasting Company

Kaplan asked to remove Item #4 from the Consent Agenda.

Hyatt/ Kaplan m/s - approval of the consent agenda as proposed for items one through three. No discussion.

Roll Call Vote: Hyatt, Dahle, Kaplan, DuQuenne, Hansen, YES. Motion passed.

Kaplan spoke with respect to Item #4, approval of the liquor license for the Rogue Valley Roasting Company. Kaplan disclosed his role as a board director and one of over 13,000 owners of the Ashland Food Coop which purchased the Rogue Valley Roasting Company. Kaplan did not believe his association with the Ashland Food Coop prevented him from making an independent decision on this application, but on advice from the City Attorney, he recused himself from discussion or voting on this item. Hyatt spoke that she would also

have a potential conflict of interest as a member of the Coop. DuQuenne spoke that she had a conflict of interest and would recuse herself, as her son works for the Ashland Food Coop. Hansen spoke that he is a member of the Ashland Food Coop. City Attorney McGeary reviewed State Ethics law prohibiting elected officials from using their office to influence decisions that may benefit their business associations. He encouraged Council members with potential conflict not to discuss or try to otherwise influence others voting on the matter. DuQuenne asked to remain recused, while other members stated their conflict did not interfere with their ability to make an independent decision from their own personal interests.

Dahle/Hansen m/s to approve the liquor license for Rogue Valley Roasting Company
No Discussion.
Roll Call Vote: Hyatt, Dahle, Kaplan, Hansen, YES. DuQuenne, abstain. Motion passed.

Hyatt/ Dahle m/s to approve Councilor DuQuenne's recusal on this item.
No Discussion.
Roll Call Vote: Hyatt, Dahle, Kaplan, Hansen, YES. Motion passed.

IX. PUBLIC HEARING

1. First Reading – ORD 3237 An Ordinance Relating to Amending AMC 2.28 to add the Department of Innovations and Technology (DoIT)

McGeary spoke of the need for this resolution.
Councilor Hyatt/Hansen m/s approval of first reading of Ordinance #3237, An Ordinance Relating to Amending AMC 2.28 to add The Department of Innovation and Technology. Scheduling of its second reading for June 18, 2024.
Discussion: Hyatt spoke that it seemed prudent and was happy to make the motion. Hansen spoke of his support in the creation of this department
Roll Call Vote: Hyatt, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

Mayor Grahm opened the public hearing. Not comments. Closed the public hearing.

2. First Reading - ORD 3240 An Ordinance for Right of Way Vacation of a Portion of Fern Street

Scott Fleury, Public Works director, provided the background information on the vacation of this portion of Fern Street. Council approved this request in December of 2023, and the City has moved forward with requirements to vacate the right of way. This includes a Planning Commission meeting with a recommendation to Council, development of the ordinance language, creation of the right of way boundary, and a map of survey. The recommendation from the Planning Commission was to include a pedestrian and utility access easement overlay, which has been included in the map of survey. Notification was provided as required by Oregon Revised Statute, which included noticing the agenda and at the street location. Kaplan asked about the pedestrian easement. Fleury clarified this is not listed in the

ordinance language which defines the vacation of right of way but is provided in the separately recorded map of survey.

Councilor Hansen/Kaplan m/s to approve Ordinance Number 3240 an Ordinance relating to the vacation of a portion of Fern Street as amended to not read Otis Street but correctly Fern Street.
Discussion: Hansen thanked the City for its efforts. McGeary noted as this is the first reading there needs to be a public hearing.
Hansen withdrew his motion.
Mayor Graham opened the public hearing. No comments. Closed the public hearing.

Councilor Hansen/Kaplan m/s to approve Ordinance Number 3240 an Ordinance relating to the vacation of a portion of Fern Street as amended to correct the reference from Otis Street to Fern Street.
Hansen again thanked the City for its work benefiting these residents.
Roll Call Vote: Hyatt, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

3. First Reading - ORD 3241 An Ordinance for Right of Way Vacation of a Portion of Meadows Drive

Fleury spoke that this right of way was reserved for a future street connection in that neighborhood which is no longer needed or warranted. Property owners asked the City to vacate the right of way, which the Council approved in December of 2023. Since then, the Planning Commission met and provided a recommendation to Council. The City has since created the ordinance and legal exhibit language of the area to be vacated on Meadows Drive. Hansen asked about the sidewalk, and Fleury confirmed it would no longer be a City project, but a Meadows Homeowners Association project.

Mayor Graham opened the public hearing. No comments. Graham closed the public hearing.

Councilor Dahle/Hyatt m/s to approve Ordinance Number 3241, an Ordinance relating to the vacation of a portion of Meadows Drive
Discussion: Dahle thanked Fleury and the Planning Commission. Hyatt did likewise.
Roll Call Vote: Hyatt, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

4. Approval of Resolutions 2024-15, 2024-17, and 2024-18 Related to the Annual Budget Declarations for Property Tax, State Revenues, Ashland Services for FY 2025

Mariane Berry, Finance Director, provided information about the three budget-related resolutions: the first for levying taxes, the second certifying City of Ashland services, and the third for declaring the City's election to receive state revenues for liquor and marijuana.
Mayor Graham opened the public hearing. No comment. Graham closed the public hearing.

Councilors Hansen/Dahle m/s to approve Resolution 2024-15 Levying Taxes for the Fiscal

Year July 1, 2024 through June 30, 2025, Such Taxes in the Levy Rate of $4.2865/$1,000 Assessed Value Upon All the Real and Personal Property Subject to Assessment and Levy Within the Corporate Limits of the City of Ashland, Jackson County, Oregon. And the City Council also levies a tax for the repayment of General Obligation Debt in the amount of $215,815.

Discussion: Hansen thanked Berry for the communication that the general obligation debt was for Fire Station Number 2. Dahle thanked Hansen for the clarification on that. DuQuenne spoke that she will not support this, as she did not vote for the budget.

Roll Call Vote: Hyatt, Kaplan, Dahle, and Hansen, YES. DuQuenne, NO Motion passed. 4-1

Councilor Kaplan/Hyatt m/s to approve a resolution: Resolution 2024-17 Certifying City of Ashland Services

Discussion: Hyatt spoke in favor of this motion as it is important and progress to the subventions motion. If the City does not certify that Ashland provides services such as Police and Fire, it would be unable to then approve the receiving of State funds.

Roll Call Vote: Hyatt, Kaplan, Dahle, and Hansen, YES. DuQuenne, NO Motion passed. 4-1

Councilor Hyatt/Hansen m/s to approve a resolution titled: Resolution 2024-18 Declaring the City's Election to Receive State Revenues.

Discussion: Hyatt spoke that her previous remarks stand. Hansen agreed.

Roll Call Vote: Hyatt, Kaplan, Dahle, and Hansen, YES. DuQuenne NO. Motion passed. 4-1

Graham thanked Berry for her work that allowed the City to receive the funds that pay for things in the general fund such as Police and Fire. Hyatt added that these funds also pay for the City's Housing Fund, such as the marijuana revenues that allow the City to have the Housing Trust Fund.

5. Public Hearing - Termination of Electric Service

Kolodzinski spoke that this item was pulled from the agenda at this time. It may come back at a later date.

X. UNFINISHED BUSINESS

1. Shelter Goals

Graham brought this forward in relation to the ad hoc committee that was formed to develop the master site plan for the 2200 Ashland Street facility. Graham along with Councilors Kaplan and DuQuenne have been working on the development of that committee. Graham asked for general guidance for this committee. Kaplan spoke to the third goal that talks about a pathway to long-term housing in Ashland for those experiencing homelessness and asked about the possibility of including shelter at that location. Graham did not intend to exclude this, but assumed it was included as being in the range from shelter on through to other types of housing. Kaplan suggested adding it in the language, which Graham noted. DuQuenne added that the second bullet point could be a broader conversation. Graham

asked if the broader discussion of South Ashland at Council was something Councilors would like to see on the agenda and asked Cotta to note to add this to a future agenda. Hyatt spoke in support of the goals as they have been articulated. Hansen agreed that the goals were broad enough to promote robust conversations. Dahle asked when the Council will hear back from this committee. Graham spoke to two community engagements for this project, the first for the end of August and the second toward the end of September. Graham clarified that first the committee will take the parameters from Council and process the options before the first community engagement. DuQuenne spoke that it was appropriate for the committee to meet at the property.

Councilor Hyatt/Kaplan m/s approval of the community goals for the 2200 Ashland Street property as amended.
Discussion: no discussion
Roll Call Vote: Hyatt, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

XI. NEW BUSINESS

XII. ORDINANCES, RESOLUTIONS AND CONTRACTS

1. Community Center and Pioneer Hall Construction Contract

Fleury spoke about this request to approve a construction contract with Outlier Construction LLC for the rehabilitation of the Community Center and Pioneer Hall. The base bid covers all the major structural issues for both buildings that were defined in previous conversations with Council. These include roof live and dead load, floor live and dead load, primary ADA accessibility issues. The alternative bid structure includes additional ADA accommodations, removal and replacement of the kitchen in the Community Center to make it ADA compatible, painting and finishes, and replacing the HVAC in both facilities. There is also a provision to consider rectifying potential damage to other parts of the buildings that may occur during this type of renovation. The expectation is for the work to begin in July or August 2024 and to be completed in early 2025 for both buildings.

Hyatt reflected to the ad hoc committee's consideration in June of 2021 which looked at cost effective solutions. At that time, Council was presented with a Moment Frame option that was not included in the current bid. Fleury spoke that the only firm to respond to the solicitation presented a different solution that was more robust as they would be carrying the liability. Dahle asked for clarification that the engineering firm accepted the bid based on these changes, and Fleury confirmed. DuQuenne reflected on the ad hoc committee work of 2021 and asked about the current bid amount of $1.7 million. Fleury clarified that the base bid is for just over $1 million, with the $0.7 million adding the alternative modifications to the package for both buildings. DuQuenne asked about the difference between the $350,000 amount proposed for both buildings in 2021 and the current bid. Fleury explained the 2021 bid did not include the HVAC system, full ADA accommodations for both facilities, some of the fit and finishes, or mitigation of the loading conditions for the facilities themselves. This resolves more issues than were considered by the ad hoc committee. DuQuenne recalled a previous Councilor's suggestion in 2021 to complete the first portion of the project, and fund raise for

the rest which she agreed with. Hyatt summarized that prior to the ad hoc committee it was just over $400,000 for each building for a total of about $800,000 to do them both. The subsequent ad hoc committee solution was $350,000, and now the menu presented is as high as $1.7 million. Fleury spoke that the current bid includes all of the ad hoc committee recommendations and includes the ADA modifications and other elements described. Graham asked Fleury to elaborate on the cost difference between residential and commercial renovations. Fleury explained the higher cost for renovations versus new buildings, and the increase of 30-40 percent over the last few years for labor and cost of goods. He added that working with the City requires a high level of liability insurance which add up. DuQuenne asked about the range of costs available to the Council, and Fleury clarified that the base bid will cover all necessary structural issues, and the alternative additions are open to Council discretion. Fleury added this project has been approved by the Historic Preservation Committee.

Councilor Dahle/Kaplan m/s to award a public improvement contract to Outlier Construction LLC for Project No. 2020-15 and 16 Community Center and Pioneer Hall Rehabilitation including all bid schedule alternatives, except 4, in the amount of $1,722,490.

Discussion: Dahle mentioned Council had just over 2.3 million budgeted for in the 2023-25 capital allocation. This project is $400,000-500,000 less than that and includes $250,000 of contingencies just in case something is found during construction. Final cost could come in well below the $1.7 million. Kaplan agreed, and thanked Fleury. Hansen shared his child spent mornings in this building and many residents have memories there. Hansen spoke in support of the more complete renovation. DuQuenne feels the Community Center needs to be open and hopes it will be open to all people. DuQuenne mentioned this could have been completed three years ago and will vote no. Hyatt thanked the team for including the ADA requirements that have been built into this estimate that will open the doors wide to all that would like to use it. Graham spoke that public investments are different from residential investments, and the community will have these buildings for a long time and is looking forward to the buildings being open.

Roll Call Vote: Hyatt, Kaplan, Dahle, and Hansen, YES. DuQuenne NO. Motion passed. 4-1

Recess taken from 7:26 to 7:35 pm

2. Special Procurement Contract - Chemicals

Fleury spoke about the need for this special procurement to allow the City to use Nielson Research for all water quality testing requirements for the parks system, wastewater system, and water system. The City is mandated to complete regulatory testing for each of these systems. The City has used Nielson Research before, and this special procurement would be for a five-year period starting from July 1, 2024. Hansen recalled this item being discussed last year, and asked how this is different so that it does not have to come back each year. Fleury

clarified this would be for a five-year term, so it would not have to come back as a contract renewal. Hyatt asked about the quality of work this laboratory has provided. Fleury spoke to the quality experienced so far and elaborated on potential of streamlining in the future. Kaplan asked about fund tracking and Fleury clarified each department will code those in their respective budgets.

Councilor Hyatt/DuQuenne m/s to approve the Council acting as the contract review board to award a contract-specific special procurement facilitating public contracts for water quality testing services to be directly awarded to Neilsen Research
Discussion: Hyatt spoke the community deserves quality water, and this is an appropriate sole-source and is happy to make the motion. DuQuenne agreed.
Roll Call Vote: Hyatt, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

3. Resolution 2024-16 Budget Supplemental to Recognize Timber Sales Revenues BN 23-25.

Marianne Berry spoke about this item as it relates to revenues for the timber sales of the Ashland Forest Lands Climate Adaptation Project presented to Council in March and April of this year. The Fire department budgeted for receiving $686,000 in timber sales, and this represents the first payment towards that in the amount of $153,000 to be recognized as revenue. Hansen spoke that we don't know the final number as the project isn't complete, but that this is the first payment of several to come. Kaplan asked about the timing of receiving additional payments. Cotta and Berry anticipated receiving the remainder within the next several months, as the timber is processed.

Councilor Hansen/Kaplan m/s to adopt Resolution 2024-16 authorizing a 2023- 2025 Biennial Supplemental Budget.
Discussion: Hansen thanked the Ashland Forest Climate Adaptation Program and Berry with her team. Kaplan agreed.
Roll Call Vote: Hyatt, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

4. Resolution 2024-19 to Approve Allocation of Transient Lodging Tax Proceeds to Travel Ashland

Marianne Berry spoke about this annual resolution. This is to allocate $517,000 of the Transient Lodging Tax proceeds to the Ashland Chamber's subsidiary Travel Ashland for fiscal year 2025. Graham confirmed this was in line with the budget, to which Berry affirmed. DuQuenne asked what happens to the remainder of this tax. Berry spoke the remaining funds are allocated for business facade improvements, event needs, beautification of downtown, wayfinding signs and upgrades for waste removal in core areas.

Councilor Kaplan/Dahle m/s to approve a Resolution to Approve Allocation of Transient Lodging Tax Proceeds to Travel Ashland
Discussion: no discussion
Roll Call Vote: Hyatt, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

Discussion on process related to changing a prior vote. DuQuenne would like to change her vote to the affirmative on Resolution 2024-17 and 2024-18.

Hansen/Hyatt m/s to give Councilor DuQuenne reconsideration opportunity to vote again for Resolution 2024-17.

No Discussion

Roll Call Vote: Hyatt, Kaplan, Dahle, and Hansen, YES. Motion passed.

Kaplan/Hyatt m/s to approve Resolution 2024-17 Certifying City of Ashland Services.

No Discussion

Roll Call Vote: Hyatt, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

Dahle/Kaplan m/s for reconsideration for Resolution 2024-18.

No Discussion

Roll Call Vote: Hyatt, Kaplan, Dahle, and Hansen, YES. Motion passed.

Hyatt /Kaplan m/s to approve a resolution titled Resolution 2024-18 Declaring the City's Election to Receive State Revenues

No Discussion

Roll Call Vote: Hyatt, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

XIII. OTHER BUSINESS FROM COUNCIL MEMBERS/REPORTS FROM COUNCIL LIAISONS

Hansen spoke of receiving information that Mount Ashland is starting construction on the new beginner lift. He spoke of a Transportation System Distribution bike tour with County officials last month and was able to see how the City of Central Point worked with the County and State to make their bike transportation system more comprehensive.

Kaplan spoke about the Housing and Human Services Advisory Committee meeting. There were excellent presentations. The first was on the Rural Development Home Loan Program as another assistance for low-income buyers to the USDA. The second was about the long history of accessory dwelling units (ADU) in Ashland. The last presentation was about all of the long-range planning work that is underway.

Dahle spoke of appreciating the discussion about the Historic Preservation committee, the preservation of Pioneer Hall, a ribbon cutting at railroad park, and the unveiling of the historic medallions along the walk they went on. Three houses received historic preservation awards. Dahle spoke of the Social Equity and Racial Justice Committee's (SERJAC) social gathering. Co-Chair Precious Yamaguchi opened up SOU's Hawk dining hall so that the committee could meet in person. Dahle spoke of Airport Day and thanked all the work from all the departments on this event.

Hyatt spoke that Southern Oregen Regional Economic Development Inc. (SOREDI) is getting ready for its next membership year and will hear from the executive director on July 16, 2024. As Council Liaison to the Planning Commission, Hyatt was very thankful for the ongoing good work and attention to that work.

DuQuenne spoke the collaboration between the Historic Preservation Committee and the Public Arts Committee is inspiring, and she has seen people stop and look at the medallions.
DuQuenne appreciated SOREDI's involvement with walking through the old Ashland Cinema and looks forward to the students who have submitted proposals for that space.
Graham spoke of meeting with Kaplan and OSF leadership. The new gift shop is open and doing brisk business, and the outdoor theater and green shows are open.
DuQuenne spoke that on June 11, SOU will raise the flag at Churchill Hall and on June 15 Black Alliance Special Events (BASE) will host a Juneteenth event at Pear Blossom Park.

XIV. ADJOURNMENT

Meeting adjourned at 8:08 pm.

Respectfully Submitted by:

City Recorder Alissa Kolodzinski

Attest:

Mayor Tonya Graham

Council Business Meeting

Date: December 17, 2024

Agenda Item	Community Center Rehabilitation - Next Steps - Management Advisory Committee Recomendations
From	Scott Fleury, Director
Contact	scott.fleury@ashland.or.us

SUMMARY

Staff is looking for direction from City Council on whether to (1) structurally rehabilitate the Community Center building as planned, (2) structurally rehabilitate the Community Center with additional modifications, or (3) demolish the current building and construct a new Community Center building. This report details the recommendations from the established Management Advisory Committee, as requested at the October 14, 2024, study session.

POLICIES, PLANS & GOALS SUPPORTED

Source	Goal	Option 1 Rehab as planned	Option 2 Rehab. w/ modifications	Option 3 Demolition & New build
Comprehensive Plan	To preserve historically significant structures and sites in Ashland. (1.30)	✓	✓	
Climate Energy Action Plan	Encourage Increased building energy efficiency and conservation. (BE-2)	✓		✓ (more so)
	Maximize efficiency of City facilities, equipment, and operations. (BE-3)			✓
	Prepare and adapt buildings for a changing climate. (BE-5)		✓	✓ (more so)
Public Works Department Goals	Maintain existing infrastructure to meet regulatory requirements and minimize life-cycle costs.	✓	✓	✓ (more so)
	Maintain and improve infrastructure that enhances the economic vitality of the community.			✓

BACKGROUND AND ADDITIONAL INFORMATION

Project Overview

The historic Community Center on 51 Windburn Way has been closed to the public since April 2019, due to structural safety concerns. In April 2024, the City of Ashland completed a plan to address the known structural issues and improve Americans with Disabilities (ADA) access. In July 2024, Outlier Construction began construction to implement the improvements. During demolition, Outlier Construction identified additional structure issues which would, if addressed, make the cost of rehabilitation near equivalent to the cost of building a new Community Center. A project history, which includes details of the structural issues, is attached to this report as Exhibit A.

Staff identified three options for moving forward and these options along with a detailed budget breakdown were provided to the MAC as part of their review and recommendation process.

Option 1: Rehabilitation as planned. Retain the historic structure and continue with the rehabilitation of the Community Center with the original design intent, with minor modifications.

Option 2: Rehabilitation with modifications. Retain the historic structure and continue with the rehabilitation of the Community Center with additional structural improvements to address the unlevel flooring, out-of-plumb exterior

walls, and water intrusion. Replace all insulation, doors, and electrical.
Option 3: Demolition & new build. Demolish the Community Center and build a brand-new structure that replicates the exterior look of the current Community Center, but changes the internal layout to improve its use-potential. A detailed description of the demolition, reconstruction, and permitting process is attached.

	Estimated Cost	Estimated Time	Additional Considerations
Option 1: Rehabilitate as planned	$978,490*	3 Months	• Retains historic structure • Will require more long-term facility maintenance • Does not improve overall usage • Does not resolve floor-leveling nor out-of-plan wall configurations
Option 2: Rehabilitate with modifications	$1,509,973*	3-4 Months	• Retains historic structure • Resolves floor-leveling and out-of-plan wall configurations • Does not improve overall usage
Option 3: Demolition & new build	$1,885,450	18-24 months	• Improves overall usage • Increases energy efficiency • Loses historic structure

*Will require additional funds for general condition; option 1 will require additional funds for electrical, doors and footing.

MAC Input & Recommendation
The City Council requested that a Management Advisory Committee (MAC) be established to review and provide a recommendation on the appropriate path forward considering the historic element of the facility and the need for appropriate recreation space for the community. A full roster of the MAC is attached as Exhibit B to this report.

The MAC considered the historical nature of the structure and its benefit to the community along with the need for appropriate and expanded recreational access throughout the two-meeting discussion. The three options above were provided to the MAC for consideration on how to best move forward with the Community Center project.

Recommendation
The MAC recommends that the City continue rehabilitation of the Community Center under the original design intent (Option 1) with the following minor modifications:

1. Replace some foundation piers
2. Retain original interior doors and replace hardware to accommodate ADA compliance
3. Install framing attachments where they are lacking
4. Install hardwood floor in smaller office/conference room (to expand rec space)
5. Increase stem wall footing size and replace sill plate around perimeter
6. Improve water proofing in foundation access area.

Their recommendation is based on the following input/discussion, including:

1. After thorough evaluation on-site and thorough review of the subject structure's foundation, framing, roof plan as well as review of engineering recommendations, the MAC concluded the Community Center is an ideal candidate for preservation.
2. The MAC concluded the cost differential between the three options is "significant" and that after full analysis of all associated variables, the costs are NOT within a reasonable "order of magnitude" between a building restoration and a building demolition and reconstruction. Option 2 is roughly 54% more than Option 1 and Option 3 is roughly 93% more than Option 1.

3. The MAC concluded the demolition of the "Woman's Civic Center" would not only be a significant community loss, but its demolition ignores the pioneering efforts lead a group of Ashland woman whom came together during challenging times to establish Lithia Park and many of its unique components.
4. The MAC concluded the subject structure could have an impact on the local economy as the structure is a contributing resource on the National Register of Historic Places and has a streetscape presence contributing to the Historic District and Lithia Park's entry.
5. The MAC concluded the loss of the Civic Center will have a "chilling effect" on future preservation efforts, often lead by the Community Development Department and Historic Preservation Commission, and private investors and citizens. These include preservation efforts by both public and private citizens to preserve the Ashland Springs Hotel, Carpenter Hall, Perozzi-Butler Fountain (twice) and the listing of four neighborhoods on the National Register of Historic Places.
6. The MAC concluded the demolition of the "Woman's Civic Center", originally built for the sole purpose of providing a space for community gathering, but also for the early planning and management of Lithia Park and concluded in the beginning of Ashland's historic preservation movement.
7. The MAC concluded an un-level floor system is minimal, as most historic structures are not level, and does not warrant measures as proposed in Option #2. See Attachment #2.
8. The MAC was also less concerned about long term maintenance costs associated with the historic structure versus a new build.
9. They expressed concern over development of the appropriate justification to the community for demolition and replacement with respect to planning requirements to restore facilities before they are demolished and rebuilt.
10. They also believed from an environmental perspective that the building you have in place although needing significant rehabilitation is still more environmentally friendly when compared to building a new structure.
11. They also understood the use of the facility has been altered over time from a meeting place to try and provide for more recreational opportunities, but it does so in a somewhat limited capacity relative to what new facility would provide. The facility has poor acoustics, limited opens space and is not as energy efficient as a new structure. The current facility can only accommodate one user at a time with the occasional duel use of the front office and small meeting room, both of which have separate entry's and are partitioned from the main assembly space. A new facility would remedy the recreation limitations with providing space for multiple users at one time.
12. They also understood the need to provide community space sooner rather than later with respect to development of a new building, which could take 18-24 months, given schematic design, design development, construction documentation, bidding and finally construction. This delay significantly increases the General Conditions costs from the Contractor, as well as the loss of income from rental of the building.

FISCAL IMPACTS

The current contract with Outlier Constructions is for $1,722,490 – an anticipated $978,490 for Community Center, $494,000 for Pioneer Hall, and a $250,000 set aside for contingency tasks. Currently, $140,268 of that contingency remains. Reference Exhibit D for the detailed budget breakdown that was provided to the MAC.

- Option 1: The current contract with Outlier Construction is expected to cover the rehabilitation as planned, with the recommended minor modifications.
- Option 2: The current contract will need to increase by at least $390,000 to cover the cost of additional structural improvements. These funds would need to be allocated from the General Fund.
- Option 3: The current contract will need to increase by at least $765,000 to cover the cost of demolition and new build. This estimate could increase if the costs of materials and labor significantly increase before construction begins. These funds would need to be allocated from the General Fund.
- No decision: Additional delays may increase the general overhead costs by Outlier Construction and may increase the likelihood of higher construction costs if the cost of materials and labor increase. It would also delay bringing the building online for community use.

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

[MAC Recommendation] *Option 1*: I move to continue with rehabilitation under the original design intent with minor modifications.

Option 2: I move to continue with rehabilitation of the Community Center with additional structural improvements.

Option 3: I move to demolish the Community Center and direct staff to begin the process to build a new structure.

REFERENCES & ATTACHMENTS

1. 12.17.2024 HPAC Community Center Letter.Atch1
2. EXHIBIT A Project History
3. EXHIBIT B MAC Roster Outline Charge
4. EXHIBIT C Demolition and New Build Process
5. EXHIBIT D Detailed Budget Breakdown
6. Community Center Attachment #2

November 6, 2024

City of Ashland
Attn: Mayor Graham & City Council
20 East Main Street
Ashland, OR 97520

RE: Community Center

Demolition Is Not the Only Path Forward!

Honorable Mayor & Council,

I am writing on behalf of the Historic Preservation Advisory Committee regarding the Community Center on Winburn Way. The recent discovery of additional structural issues in the building is problematic, but not unsurmountable. Many of us in the community have considerable experience working on historic structures, and making these discoveries throughout construction is not to be unexpected. There will always be several solutions (and compromises) moving forward.

I am sure you are aware of the value of preserving our historic buildings – they provide context to our past, identity for our present, and inform our future. A municipality that has demolished its historic structures for the sake of modernity is a sad one. What would the cities of Venice or Kyoto be without the iconic buildings that shape their landscape and reflect their culture? The Community Center building in Ashland as humble as it may be, is our version of this; it is an extension of our community character.

Constructed in 1922, the building was the meeting place of the Ashland Women's Civic Improvement Club, and as such it is the foundation of the women's movement in Ashland that engaged public support for involvement in the City Beautiful Movement of the early 20th century. In the years that followed, the building was the setting for innumerable public occasions and social events, meetings, parties, exhibits, dances, festivals, and gatherings that have occurred over the past 100 years. The memories of this place reach across the community and beyond. The building's Arts and Crafts character, evocative of the Chautauqua movement and Ashland's heyday as a mountain wellness sanctuary, defines our community – enriches it and enlivens it. It sets us within a context

HISTORIC PRESERVATION ADVISORY COMMITTEE
51 Winburn Way Tel: 541.488.5305
Ashland Oregon 97520 Fax: 541.552.2050
http://www.ashlandoregon.gov TTY: 1.800.735.2900

of understanding our place in the world. This is not something that can be replicated with new construction.

The Secretary of the Department of the Interior(DOI) has set standards for the preservation of historic structures in our country which have been adopted by reference as a guiding document to Ashland's own Historic District Development Standards. These include recommendations for the care, maintenance, and repair of buildings listed on the National Historic Register. The Council may not be aware that these standards emphasize preservation of all historic fabric in favor of replacement. This means preservation of original materials and craftsmanship to the maximum extent possible while any repair work is underway. Where original materials cannot be preserved, they should be replaced in-kind. Where this is untenable, the DOI recommends reconstruction of buildings in-kind. In the case of the Community Center, I urge the council to explore options that maximize the amount of preservation of original materials, and creative reuse of such materials as possible.

The HPAC recognizes the advanced cost of rehabilitating the Community Center building, yet I beseech you to reconsider demolition as the only path forward. Preserving our history comes at a cost, however the price of losing one of our historic gems is even greater. We lose out on part of the unique character that makes Ashland such a wonderful place to live and visit. There are other paths forward, and HPAC is happy to provide guidance on how to get there.

Kindly,

Shelby Scharen

Shelby Scharen, *Chair*
City of Ashland Historic Preservation Advisory Committee

For further reading:

The Secretary of the Interior's Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring & Reconstructing Historic Buildings, Kay D. Weeks and Anne E. Grimmer (1995, rev. 2017). US Dept of the Interior, NPS, Technical Preservation Services, Washington, DC

EXHIBIT A - Project History

April 2019 – Structural investigation is performed on the Community Center. Major findings are:

- Excessive deflection in the roof and walls, especially at the west end of Main Hall
- Outward deflection of the north wall, which poses a risk of total collapse.
- Insufficient support for structural members, contributing to additional safety risks.

April 2019 – Community Center is closed to public access due to safety concerns.

June 2022 - March 2024 – City generates a plan to resolve known structural issues and improve American with Disabilities (ADA) access.

April 2024 – Outlier Construction is awarded a construction contract to implement improvements.

September 2024 – During demolition, Outlier Construction identifies the additional structural issues, which would, if addressed, make the cost of rehabilitation near equivalent to the cost of new build construction.

- (+/-) 2" out-of-level flooring conditions.
- Exterior walls (stem and foundation) are out of plumb upwards of 4".
- Significant water intrusion

OCTOBER 14, 2024 – City Council holds Study Session to discuss the additional structural issues and the options for moving forward. City Council directs staff to form a Management Advisory Committee (MAC) to provide input and a recommendation.

NOVEMBER 7, 2024 – MAC Meeting #1

NOVEMBER 14, 2024 – MAC Meeting #2

EXHIBIT B – MAC Roster, Outline, and Charge

The MAC was composed of:

Scott Fleury PE – Public Works Director (City of Ashland)
Rocky Houston – Parks & Recreation Director (City of Ashland)
Stephen Matiaco – Building Official (City of Ashland)
Dale Shostrom - Member of Historic Preservation Advisory Committee, Local Contractor
Steven Ennis – Local Architect
Mark Knox – Local Planner and Developer
Cori Grimm – Recreation Facility User/Teacher
Ryan Demillo – Outlier Construction
Scott Groggins – Outlier Construction
Chadd Hendrickson – Outlier Construction
Stephen Chase – ZCS Engineering
Jessi Russel – ZCS Engineering

Background:
At the October 14, 2024 City Council Study Session, the Council requested staff initiate a Management Advisory Committee (MAC) to review the mitigation versus new construction for the Ashland Community Center.

Management Advisory Committees (MAC) may be established to serve at the request of the City Manager or Department Heads to provide technical advice, and community support and input that can assist in preparing recommendations to enhance City operations or program implementation or for City Council consideration.

MACs are generally intended to be project or program specific but can meet as often and as long as necessary to meet their requested role or functions. Some MACs may meet only occasionally when requested, while others may meet regularly or semi-regularly over extended periods of time per the role assignment or needed term for their assistance. Membership on MACs will be established based on the type of advice sought and availability of potential qualified participants, urgency of issue or program being addressed, timeframe for the committee's role/participation,
availability of City staff support resources, and/or other circumstances or considerations affecting the ability for effective MAC role participation. The rules of procedure, if necessary, for each MAC will also be established by the City Manager or appointing Department Director at the time of the corresponding MAC's establishment. The City Council may refer issues or tasks to consideration by a MAC by vote of the City Council request to the City Manager.

The Council requested this process as an efficient way to review the documentation and obtain additional input from community members experienced in construction/renovation, but also to gain input from facility users on need and usability.

MAC Charge:
The MAC is charged with review of historic and current information for the Community Center in order to gain and understanding of the facility history and current use as a community resource. This background information will lead the basis in review of the primary options on moving forward with either completing full structural modifications to the building or demolishing the structure and building a new Community Center.

The MAC should develop a summary comparing the options to rehabilitate or replace the Community Center and make use of existing materials with limited new studies or information gathering required. The final recommendations to the Director of Public Works should also attempt to include an analysis of the benefits to the citizens of keeping a historical building as well as the benefits to citizens of the additional functionality available in a new building.

MAC Objectives:
The objective of the MAC based on the charge is to make recommendations to the Director of Public Works on moving forward. The Director will take these recommendations to the City Council for consideration as part of an ongoing public process.

EXHIBIT C – Demolition and New Build Process

Historic Building Demolition:
As the structure is nationally registered historic structure Oregon Revised Statutes require a specific process for public agencies if they wish to demolish this type of facility and construct something new, see details/criteria of ORS 358.653 below.

Oregon Revised Statutes (ORS): ORS 358.653 establishes that public agencies must seek to preserve properties that are listed or eligible for listing on the National Register of Historic Places. The statute requires that alterations or demolitions of historic properties be carefully evaluated, and agencies should avoid or mitigate negative impacts on historic resources. ORS 358.653 outlines that significant factors in evaluating a property's historic status include not only its physical condition but also its historic integrity, age, and value to the community

When a significant remodel, demolition, or partial demolition of a historic property is undertaken by a government entity or using tax dollars, the State Historic Preservation Office (SHPO) requires, per ORS 358.653, that a clearance form be submitted to SHPO. The City must also propose specific measures to mitigate the adverse impacts as part of the SHPO process.

Smaller projects that involve minor exterior alterations to a historic building and substantial rehabilitations are reviewed by our Historic Preservation Advisory Committee (HPAC), as Ashland is a Certified Local Government (CLG), a status to which SHPO defers for such reviews. However, SHPO does not delegate the review of demolitions for individually listed historic properties in the same way. In these cases, the City, as the applicant, would need to address SHPO's clearance requirements, informed by the public hearing process outlined.

The following actions would need to occur in order for the City to move forward with demolition and replacement of the Community Center:

- Hold a public hearing: The State Historic Preservation Office (SHPO) requires a public hearing procedure when considering the demolition of a building that is individually listed on the National Register of Historic Places. The purpose of this process is to ensure that due consideration is given to the historical significance of the structure and to provide an opportunity for public input before any irreversible decisions, such as demolition, are made.

Reconstruction Process:
The Ashland Community Center is located in the R-1-7.5 (Single Family Residential) zone, where public parks and recreational facilities are an outright permitted use. The existing use of the Community Center as a "Parks, Open Space & Recreational Facility" is allowed without the need for special permits. However, the building itself is considered a non-conforming structure due to its proximity to the front property line. The building's existing front setback is approximately 18 feet, while the current zoning code requires a minimum setback of 20 feet.

As a result, if the building were to be reconstructed on the same footprint, it would require a Conditional Use Permit (CUP) under Ashland's land use code, which would necessitate a Planning Action review. This process could take between 48 to 120 days from the submission of a complete application.

Alternatively, if the building is redesigned with the front façade set back by an additional 2-3 feet, the non-conforming setback issue would be resolved. This would allow the reconstruction to proceed with only the necessary building permits, avoiding the CUP process entirely. Additionally, setting the building back would accommodate an improved accessible ramp entrance, making the building more accessible and compliant with ADA standards.

The new building could be designed to be substantially similar to the existing structure, preserving the historic character of the Community Center while ensuring that it meets modern safety and accessibility standards. A plaque on site acknowledging that the replacement building is designed to reflect the historic structure would elevate confusion as to its age and historic status.

Permitting Process:

- Obtain demolition permit
    - Demolish the building and clear the site
    - Over the counter building permit required to ensure utilities are capped off appropriately

- Obtain building Permit
    - Design and permit a replacement building that is substantially similar in design to the original structure but meets modern building codes, including:
        - Full compliance with ADA accessibility standards
        - Enhanced energy efficiency and insulation
        - Installation of fire sprinkler systems and other safety features
        - Improved planning setbacks and zoning compliance
        - Increased occupancy classification to serve a wider range of community needs

EXHIBIT D - Detailed Budget Breakdown

Community Center Option #1		
Base Structural Bid	$	685,100
ADA Accessible Kitchen and Lighting	$	17,700
Quartz Countertop	$	4,800
Stage Ramp	$	10,740
Refinish Wood Floors	$	17,400
Interior Paint	$	18,900
Carpet Tiles (Office)	$	5,100
Hardscape and Stormwater	$	33,700
Exterior Paint	$	11,900
Concrete Stem Wall (complete perimeter)	$	62,850
HVAC	$	110,300
Base and Alternative Total*	**$**	**978,490**

***Will require additional funds for electrical, door and footing changes**
***Will require additonal funds for general conditions**
Does not resolve floor leveling and out of plan wall configurations
Will require more long term maintenance of facility
Does not improve overall usage, circulation, acoustics, etc.
Retains economics of a historic structure
Retains original construction schedule

Community Center Option #2		
Additional Structural, Doors, Electrical	$	381,483
Unknown Additional Finishing Repairs after Jacking	$	150,000
Additional Total	**$**	**531,483**
Final Solution Total**	**$**	**1,509,973**

****Resolves out of level floor and out of plan wall conditions**
***Will require additonal funds for general conditions**
Does not improve overall usage, circulation, acoustics, etc.
Economics of a historic structure cultural value and environmental aspects
Slight modification to original construction schedule

Community Center Option #3		
New Building Costs (Construction)	$	1,500,000
Architectural & Engineering Fees for New Construction	$	300,000
Demolition	$	40,000
Buildings Permit Fees	$	45,000
Demolition Permit	$	450
Estimated Total Project Cost (New)	**$**	**1,885,450**

Loss of historic structure
Improved usage and energy efficiencies
Improved usage draws more to downtown
Requires Justification to development community
Requires historic preservation mitigation process
Schedule most likely aligns with a 18-24 month process before facility could be utilized

Ashland Community Center
Attachment #2

Sloping floors in Historic Buildings
By Dale Shostrom
December 5, 2024

During the City Council Study Session of October 14, 2024, Scott Fleury presented a ***floor plan*** slide (provided by Outlier) of the Community Center showing the relative measurements of how 'out of level' the floors are in the building. Outlier Construction claimed that this was a serious condition that needed to be rectified. See the attached floor plan that I modified to show the actual slope between each of the data points that Outlier was concerned about. Of the approximately 25 calculated slopes, only three were **1%** or over, with the maximum of **1.4%** and the average of (+or-) **0.5%**.

In historic buildings, when floors are out of level, the acceptable slope is generally around **1-2%** (approximately 1/8 to 1/4 inch per foot), depending on the building's age, design, and structural condition. Here's a breakdown of what each percentage range typically represents:

1. **0.5-1% Slope (approx. ½" to 1" in 8 feet)**:
    - This is a very mild slope, often considered *imperceptible* in daily use. In most historic preservation contexts, this amount of slope is easily acceptable, as it rarely impacts usability or safety.
2. **1-2% Slope (approx. 1" to 2" in 8 feet)**:
    - This is often noticeable, especially in larger spaces or across long floor spans, but it is generally tolerated in historic buildings. This range is typically acceptable as long as it doesn't interfere with safety, usability, or significant aesthetic concerns. It aligns well with most preservation standards, as it allows for the character of the building to be maintained while ensuring comfort and functionality.

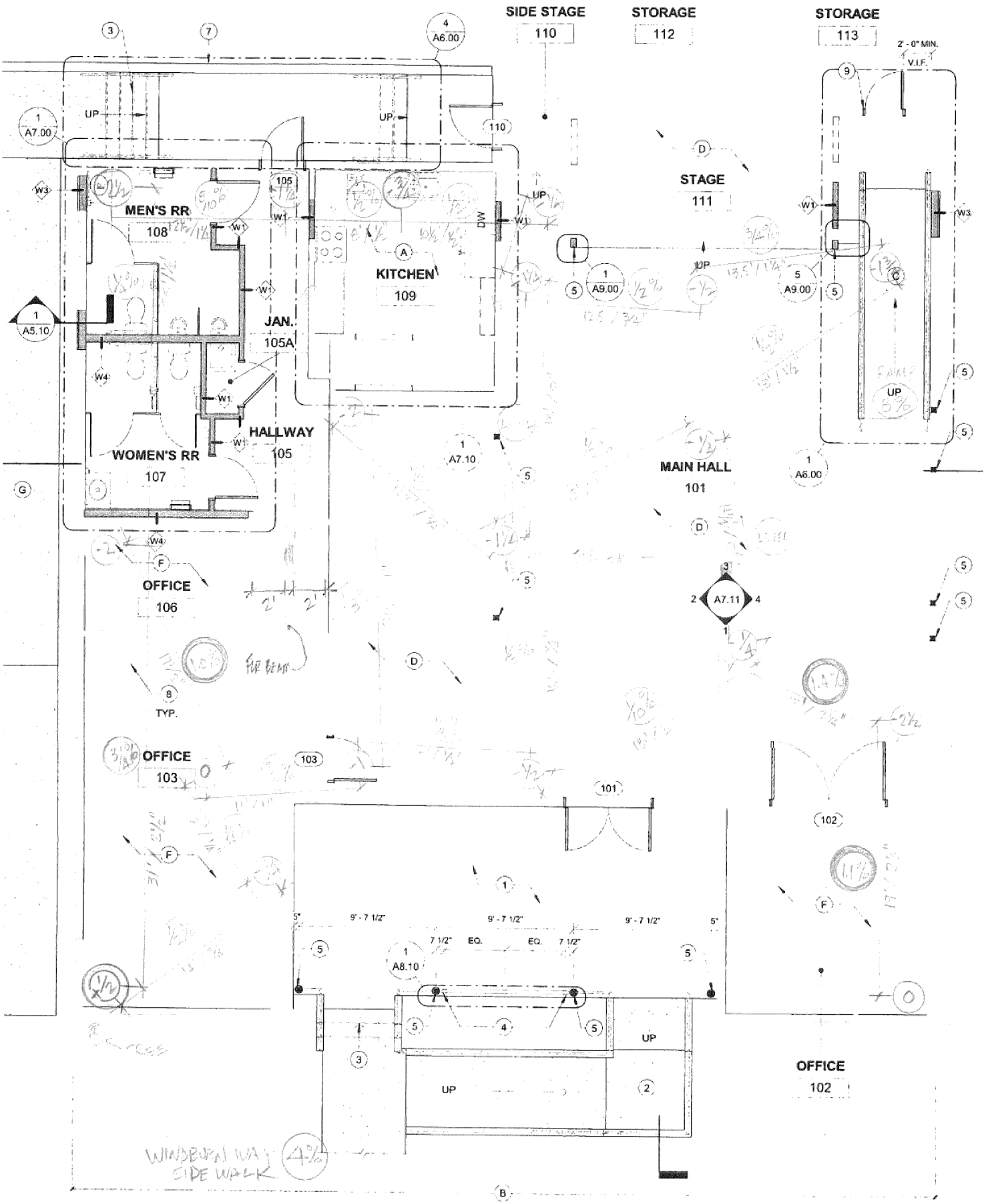
Preservation standards and guidelines prioritize maintaining the historical integrity of buildings while balancing safety. For any slopes above 2%—or where there are signs of structural concerns—it's recommended to consult an engineer or preservation specialist.

Outlier will be stabilizing the floors and foundations with new perimeter footing and stem walls, additional post and beam piers and strengthening the existing supporting members.

100-year-old wooden buildings are very structurally flexible, but they also have a memory in their components that sometimes make it difficult to straighten or level them while *jacking*.
The existing floors, exterior and interior walls could be *jacked* toward more level, but there's a risk in that the lathe and plaster walls and ceiling finishes could begin to crack and potentially fall off the framing members, requiring full replacement.

There are places in the building that might have less risk if *jacked*, such as the new bathrooms and kitchen areas, where the studs and plaster have been removed . In the Main Hall, on the *north* wall, where the two original roof trusses transfer their load the to the foundation, is another area that could be *jacked* 1"or 2" successfully. Here the plaster ceiling and some wall finishes have been removed, so *jacking* could probably help straighten both the floor and exterior sagging appearance.

See attached Floor Plan


SIDE STAGE
110
STORAGE
112
STORAGE
113
2' - 0" MIN.
V.I.F.
STAGE
111
MEN'S RR
108
KITCHEN
109
JAN.
105A
HALLWAY
105
WOMEN'S RR
107
MAIN HALL
101
OFFICE
106
OFFICE
103
OFFICE
102
UP
W1
W3
W4
DW
A6.00
A7.00
A5.10
A9.00
A7.10
A7.11
A8.10
TYP.
FOR BEAM
9' - 7 1/2"
7 1/2"
EQ.
WINDBURN WAY
SIDE WALK
4%

ASHLAND CITY COUNCIL
BUSINESS MEETING MINUTES
Tuesday, December 17, 2024

6:00 PM Business Meeting

Council Present: Mayor Graham, Councilors Hyatt, Bloom, Dahle, DuQuenne, Kaplan, and Hansen
Council Absent: None
Staff Present:

Sabrina Cotta	City Manager
Doug McGeary	Acting City Attorney
Carmel Zahran	Assistant City Attorney
Rocky Houston	Parks & Recreation Director
Lea Richards	GIS Specialist
Mariane Berry	Finance Director
Miranda Iwamoto	Accounting Manager
Dana Mason	Finance Manager
Tighe O'Meara	Police Chief
Mark Shay	Fire Marshall
Scott Fleury	Public Works Director
Alissa Kolodzinski	City Recorder

I. CALL TO ORDER

Mayor Graham called the meeting to order at 6:01 p.m.

a. Land Acknowledgement**

Councilor Hyatt read the land acknowledgement.

II. PLEDGE OF ALLEGIANCE

Councilor Kaplan led the pledge of allegiance.

III. ROLL CALL

IV. MAYOR'S/ CHAIR OF THE COUNCIL ANNOUNCEMENT

V. APPROVAL OF MINUTES

a. Minutes of the November 18, 2024 - Study Session
b. Minutes of November 19, 2024 - Business Meeting
c. Minutes of the December 2, 2024 - Study Session
d. Minutes of the December 3, 2024 - Business Meeting

Councilors requested two corrections:

- to the minutes of 12.3.24 meeting to reflect comments made by a citizen at the study session on 12.16.24
- to the minutes of 12.3.24 meeting to add under the WRC Special Sentence to the sentence: '...and Hansen spoke of the potential economic development in tourism and increased economic mountain biking recreation.'

Motion made to approve the minutes with corrections.

Motion: Hansen Second: Bloom

Roll Call Vote: Councilor Hyatt, Bloom, DuQuenne, Kaplan, Dahle, and Hansen. YES. Motion passed.

VI. CONSENT AGENDA

a. OPRD Local Government Grant Program Agreements

Discussion:

DuQuenne requested the item be removed from the consent agenda for clarity regarding the related expenses stated in the agenda packet. Parks and Recreation Director Rocky Houston clarified that there is about $3.4 Million in the department's Capital Improvement Fund for the expected City expenses of $1.4 Million listed in the Grantee Match for this project.

Decision:

Motion made to approve OPRD Local Government Grant Program Agreements for the Hunter Park Tennis Courts Rehabilitation Project and the East Main Bicycle Pump Track Park.

Motion: Hyatt Second: Hansen

Roll Call Vote: Councilor Hyatt, Bloom, DuQuenne, Kaplan, Dahle, and Hansen. YES. Motion passed.

VII. SPECIAL PRESENTATIONS

a. See Click Fix Demo

Lea Richards GIS Specialist provided a demonstration (see attached)

- Council suggested sharing the presentation as a how-to-guide on the City's website
- Council discussed the differences between the use of this product and other existing reporting platforms such as near-miss and wildlife reports.
- Users can see what reports have already been made
- The product can be downloaded onto a personal devise or through the City's website
- The Emergency Management Coordinator is involved and able to receive notices

b. Audit Presentation - Audit Committee Report

Finance Director Mariane Berry, Finance Manager Dana Mason, and Accounting Manager Miranda Iwamoto presented highlights of the Annual Comprehensive Financial Report ACFR. (Draft report included in agenda packet.) Amanda McCleary-Moore and Kim Reno from Moss Adams provided a presentation on audit results. (attached).

- Long term debt is addressed in the notes in the financial statements.
- Estimated revenue for the general fund can be found on page 76 of the ACFR
- Council expressed appreciation to the Moss Adams team and to the City staff who worked on the audit
- Current financial data in Open Gov will be completed as soon as the audit is complete. The 2nd quarter financial results will be presented at Council in February and the financials through November will be posted in about a week in Open Gov.

Audit Committee Member Kristen Roy highlighted three key takeaways from her experience on the committee and recognized the hard work done by management to obtain a clean

audit report:

- Accounts receivable balances were due to suspended utility delinquency processing during the pandemic resulting in the adjustment mentioned in the Moss Adams report
- Management implemented two significant new standards for leases and subscription-based info-technology agreements
- The City created five new System Development Charges (SDC's) Funds for: Streets, Parks, Water, Wastewater, and Storm Drain

VIII. PUBLIC FORUM

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

Several citizens spoke in support of the Climate and Clean Air Policy package, concern about the possible Madrone Ridge Property acquisition, and concern about the requirement for utilities to be turned on and off online only.

IX. PUBLIC HEARING

a. First Reading - ORD 3248 An Ordinance Creating Section 2.28.600 of the Ashland Municipal Code Establishing the Parks and Recreation Department

Doug McGeary provided an overview for the ordinance designed to be compliant with the City's Charter, align operations, clarify roles, and reduce City liability with a clear structure. Graham summarized the reason, process and joint effort between the City Council and APRC in requesting the City's Legal department to draft this ordinance for review by both bodies.

Discussion:

- Discussion regarding APRC role in strategic planning and budgeting under 2.28.650 F Long Term Financial Planning. McGeary clarified that this ordinance does not reduce APRC or Council involvement with planning and budgeting. Cotta clarified that the APRC would bring proposals to Council who would move things forward.

Public Hearing open

Rick Landt – asked that the first reading be postponed until the full APRC can review it.

Mike Gardiner – asked the Council to fully consider language options for the ordinance.

Public hearing closed

- Discussion on changing the word 'shall' to 'may' under 2.28.640 B2 C related to termination process and APRC open vote.

Decision:

Motion made to approve First Reading of Ordinance #3248, " An Ordinance Creating Section 2.28.600 of the Ashland Municipal Code Establishing the Parks and Recreation Department ", with the following change: 2.28.640 B2 C – change "shall" to "may", and schedule Second Reading for January 21, 2025.

Motion: Hansen Second: Hyatt

Roll Call Vote on amendment: Councilor Hyatt, Bloom, DuQuenne, Hansen, Dahle, and Kaplan YES. Motion passed.

b. First Reading - ORD 3252: Amending 14.16.015 to Allow for Conservation Measures

Carmel Zahran spoke that this amendment clarifies the Electric Fund may be used for several conservation measures as outlined.

Discussion: none

Open Public Hearing

Paul Mozina – expressed concern for how this may be used and asked for clarity in the ordinance language.

Closed Public Hearing

Decision:

Motion made to approve the First Reading of Ordinance 3252, Amending 14.16.015 to Allow for Conservation Measures.

Hansen recused himself from the vote due to conflict of interest.

Motion: Kaplan Second: Dahle

Roll Call Vote on amendment: Councilor Hyatt, Bloom, DuQuenne, Dahle, and Kaplan YES. Hansen: Abstain. Motion passed.

Recess taken from 8:10 to 8:15

X. ORDINANCES, RESOLUTIONS AND CONTRACTS

a. Second Reading ORD 3253 Amending AMC 10.120 ELEA to add CAP East

Police Chief O'Meara and Zahran discussed the changes between the first and second readings.

- 10.120.020 Section A – Clarifies that convictions received by any competent court of jurisdiction (not just Ashland Municipal Court) in ELEA areas East and/or West are applied distinctly and separately when considering expulsion orders for either Area.
- 10.120.020 Section B – pursuant to AMC 10.125.010
- 10.120.040 Section B – clarifies when a person subject to an expulsion order may legally enter the area from which they have been expelled.

Discussion: Zahran and O'Meara answered Councilor questions and affirmed plans to bring back to Council proposed changes beyond just adding CAP East as directed by Council. Councilors spoke of their reasons for either supporting or not supporting the ordinance.

Public Hearing open

Werthaiser – expressed concern about the proposed ordinance

Neiswander – expressed opposition to the ordinance

Navickas – expressed opposition to the ordinance as discriminatory

Public Hearing Closed

Decision:

Motion to approve second reading of Ordinance 3253 amending AMC 10.120 ELEA to add CAP East including the changes as presented with changes as discussed.

Motion: Bloom Second: Dahle

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

Council requested additional data to be part of the discussion at the ELEA study session on Feb 3.

b. Apparatus Contract Purchase

Fire Marshall Mark Shay provided a presentation regarding the proposed purchase of an aerial ladder truck for the Fire Department (see attached).

Discussion:

- Shay discussed re-appropriating unused but allocated funds reserved another vehicle (the department received a grant for this vehicle) and the sale of the engine to be replaced by this purchase as future budgetary considerations and clarified that the current request is to lock in the purchase price (not for funding at this time).
- Cotta clarified that this is unique from other purchases that can be completed in one budget cycle, but represents planning needed five years in advance for a vehicle that will not be received for two budget cycles.
- This ladder truck was taken into consideration while state mandated Climate Friendly Areas rolled out that increase allowable building heights.
- Being under contract for this truck will contribute to a better ISO rating.

Decision

Motion made to approve the purchase agreement with Hughes Fire Equipment to purchase a Pierce Enforcer 107 Ascendant Aerial BN1182 apparatus.

Motion: Hyatt Second: Bloom

Roll Call Vote: Councilor Hyatt, Bloom, DuQuenne, Hansen, Kaplan and Dahle, YES. Motion passed.

XI. UNFINISHED BUSINESS

a. Community Center Rehabilitation - Next Steps - Management Advisory Committee (MAC) Recommendations

Public Works Director Scott Fleury summarized the background of this topic. The MAC members discussed three options for the Community Center. Option 1: continue the current rehabilitation with minor modifications as required. Option 2: continue current rehabilitation with more robust structural improvement to address leveling floors and out-of-plumb walls discovered after the project began. Option 3: demolish the facility and rebuild which would meet current seismic code. The MAC arrived at a recommendation for Option 1. Complete MAC recommendations, current budget, and possible project budget per option are included in the agenda packet.

Discussion:

- Anticipated completion of Option 1 would be in March or April for opening to the public. Option 2 would take an additional month or two. Option 3 for new building would likely be completed sometime in 2026.
- There is still some increased cost expected for Option 1 to meet building codes.
- Council asked about structural integrity and Fleury spoke that the project engineers are confident that the building will be meet building code with recommended modifications but it will still not meet the seismic code requirements.

- Staff recommendation was to build a new building to allow for more usage, meet seismic code requirements, improve ADA accessibility and be more energy efficient. Parking options during construction was discussed.
- Council discussed reasonableness of expending these funds on a single building as the City is undergoing a complete facility assessment including significant deferred maintenance. Councilors stated reasons for how they will vote.

Decision:

Motion made to continue with option one rehabilitation under the original design intent with minor modifications

Motion: Dahle Second: Kaplan

Roll Call Vote: Councilor Hyatt, Bloom, DuQuenne, Kaplan and Dahle, YES. Hansen, NO Motion passed.

b. Council Adoption of 2200 Ashland Street Master Plan

Moved to next meeting

c. 2200 Ashland Street Facility Plan Ad Hoc Committee

Moved to next meeting

d. Social Services Coordinator Position

Cotta spoke that possible funding for the position requested earlier in the year includes utilization of opioid funds which would inform what the position would do and is outlined in the agenda packet. More analysis is needed to consider if this would be a part- or full-time position and when it would be brought online.

XII. NEW BUSINESS

XIII. CITY MANAGER REPORT

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

a. Recognition of Council Chair Paula Hyatt

Motion made for Council to take some time to recognize Colleague and Councilor Paula Hyatt.

Motion: Bloom Second: Dahle

Discussion: Councilors, Citizens, and City Staff took turns in expressing gratitude, admiration, appreciation and love for all the work and heart Council Hyatt has given to this community. Hyatt expressed gratitude for the work of the Council, Committees, Commissions and Staff.

XV. ADJOURNMENT

Bloom/Hyatt m/s to adjourn. All in favor. The meeting was adjourned at 9:39 p.m.

City Recorder Alissa Kolodzinski

Mayor Tonya Graham

RESOLUTION NO. 2025-17

A RESOLUTION TO ADOPT THE BIENNIUM 2025-2027 BUDGET AND APPROPRIATE SUCH AMOUNTS AS NECESSARY TO IMPLEMENT THE BIENNIUM 2025-2027 BUDGET

RECITALS:

A. The City of Ashland City Council hereby appropriates the following amounts for the biennial budget period beginning July 1, 2025, through June 30, 2027.

THE CITY OF ASHLAND HEREBY RESOLVES AS FOLLOWS:

SECTION 1. The City of Ashland City Council hereby appropriates the 2025-2027 Biennial Budget as shown:

	BN 2025/27 ADOPTED BUDGET
GENERAL FUND	
Administration Department	9,257,589
Innovation and Technology Department	2,593,120
Finance Department	6,816,806
Police Department	19,139,886
Fire and Rescue Department	23,705,542
Public Works Department	8,487,863
Community Development Department	4,885,705
Parks Department	15,797,635
Transfers Out	1,234,568
Contingency	2,557,485
TOTAL GENERAL FUND	**$94,476,199**
Unappropriated Ending Fund Balance	7,223,795
TOURISM FUND	
Personnel Services	185,135
Materials and Services	1,870,260
Contingency	61,662
TOTAL TOURISM FUND	**$2,117,057**
Unappropriated Ending Fund Balance	242,841

	BN 2025/27 ADOPTED BUDGET
HOUSING FUND	
Materials and Services	326,642
TOTAL HOUSING FUND	**$326,642**
Unappropriated Ending Fund Balance	0
COMMUNITY DEVELOPMENT BLOCK GRANT FUND	
Personnel Services	80,068
Materials and Services	409,669
TOTAL CDBG FUND	**$489,737**
Unappropriated Ending Fund Balance	0
RESERVE FUND	
Transfers Out	0
TOTAL RESERVE FUND	**0**
Unappropriated Ending Fund Balance	2,151,552
STREET FUND	
Public Works - Street Operations	25,452,132
Public Works - Street Debt	857,516
Transfers Out	274,500
Contingency	270,332
TOTAL STREET FUND	**$26,854,480**
Unappropriated Ending Fund Balance	5,150,079
SDC STREET FUND	
Materials and Services	50,000
Capital Outlay	380,261
Debt Service	300,000
Contingency	1,500
TOTAL SDC STREET FUND	**$731,761**
Unappropriated Ending Fund Balance	2,288,435
WILDFIRE RISK REDUCTION FUND	
Personnel Services	1,321,996
Materials and Services	214,440
Contingency	46,093
TOTAL WILDFIRE RISK REDUCTION FUND	**$1,582,529**
Unappropriated Ending Fund Balance	810,080

	BN 2025/27 ADOPTED BUDGET
AIRPORT FUND	
Materials and Services	317,994
Capital Outlay	1,830,000
Contingency	9,540
TOTAL AIRPORT FUND	**$2,157,534**
Unappropriated Ending Fund Balance	195,316
CAPITAL IMPROVEMENTS FUND	
Public Works - Construction Capital Outlay	758,634
TOTAL CAPITAL IMPROVEMENTS	**$758,634**
Unappropriated Ending Fund Balance	0
PARKS CAPITAL IMPROVEMENTS FUND	
Capital Outlay	5,903,000
Transfer Out	1,072,590
TOTAL PARKS CAPITAL IMPROVEMENTS FUND	**$6,975,590**
Unappropriated Ending Fund Balance	779,034
SDC PARKS FUND	
Capital Outlay	325,000
Contingency	0
TOTAL SDC PARKS FUND	**$325,000**
Unappropriated Ending Fund Balance	289,362
DEBT SERVICE FUND	
Debt Service	933,205
Transfers Out	900,000
TOTAL DEBT SERVICE FUND	**$1,833,205**
Unappropriated Ending Fund Balance	212,184
WATER FUND	
Public Works - Conservation Division	604,771
Public Works - Water Operations	58,280,584
Public Works - Water Debt	1,551,784
Transfers Out	100,000
Contingency	481,863
TOTAL WATER FUND	**$61,019,002**
Unappropriated Ending Fund Balance	23,190,660

	BN 2025/27 ADOPTED BUDGET
SDC WATER FUND	
Materials and Services	150,000
Capital Outlay	7,675,230
Debt	420,375
Contingency	17,111
TOTAL SDC WATER FUND	**$8,262,716**
Unappropriated Ending Fund Balance	78,863
WASTEWATER FUND	
Public Works - Wastewater Operations	21,481,691
Public Works - Wastewater Debt	1,946,951
Contingency	445,263
TOTAL WASTEWATER FUND	**$23,873,905**
Unappropriated Ending Fund Balance	3,944,001
SDC WASTEWATER FUND	
Capital Outlay	1,220,500
Contingency	0
TOTAL SDC WASTEWATER FUND	**$1,220,500**
Unappropriated Ending Fund Balance	3,152,113
STORMWATER FUND	
Public Works - Stormwater Operations	3,168,355
Public Works - Stormwater Debt	21,225
Contingency	45,756
TOTAL STORM FUND	**$3,235,336**
Unappropriated Ending Fund Balance	1,701,766
SDC STORMWATER FUND	
Capital Outlay	64,908
Contingency	0
TOTAL SDC STORMWATER FUND	**$64,908**
Unappropriated Ending Fund Balance	33,913

	BN 2025/27 ADOPTED BUDGET
ELECTRIC FUND	
Electric-Conservation	2,772,841
Electric-Operations	37,901,609
Electric - Debt	1,762,326
Contingency	1,213,103
TOTAL ELECTRIC FUND	**$43,649,879**
Unappropriated Ending Fund Balance	7,719,145
TELECOMMUNICATIONS FUND	
Personnel Services	2,366,802
Materials and Services	3,094,682
Capital Outlay	1,649,491
Contingency	163,844
TOTAL TELECOMMUNICATIONS FUND	**$7,274,819**
Unappropriated Ending Fund Balance	1,804,087
INSURANCE SERVICES FUND	
Personnel Services	279,819
Materials and Services	2,996,726
Contingency	98,297
TOTAL INSURANCE SERVICES FUND	**$3,374,842**
Unappropriated Ending Fund Balance	2,444,946
EQUIPMENT FUND	
Public Works - Maintenance	5,509,878
Public Works - Purchasing and Acquisition	3,658,000
Contingency	165,296
TOTAL EQUIPMENT FUND	**$9,333,174**
Unappropriated Ending Fund Balance	9,583,662
CEMETERY TRUST FUND	
Transfers Out	150,000
TOTAL CEMETERY TRUST FUND	**$150,000**
Unappropriated Ending Fund Balance	938,610
TOTAL APPROPRIATIONS ALL FUNDS	**$300,087,449**
TOTAL UNAPPROPRIATED ALL FUNDS	**$73,934,444**
TOTAL ADOPTED BUDGET ALL FUNDS	**$374,021,893**

SECTION 2. This resolution is effective upon adoption.

This resolution was duly PASSED and ADOPTED this 3 day of June, and takes effect upon signing by the Mayor.

Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this 3 day of June, 2025.

Tonya Graham, Mayor

Reviewed as to form:

Johan Pietila, City Attorney

RESOLUTION NO. 2026-03

A RESOLUTION APPROVING A SUPPLEMENTAL BUDGET AND BUDGET APPROPRIATION ADJUSTMENTS FOR THE 2025-2027 BIENNIAL BUDGET PERIOD BEGINNING JULY 1, 2025.

RECITALS:

A. The City of Ashland 2025-27 Biennium Budget was adopted on June 6, 2025, for the period of July 1, 2025, through June 30, 2027.

THE CITY OF ASHLAND HEREBY RESOLVES AS FOLLOWS:

SECTION 1.

1. The following proposed budget adjustments are authorized by ORS 294.473. Oregon Budget Law requires a public hearing and published summary of changes if the proposed supplemental budget will change any fund's expenditures by more than 10 percent. The change to the Capital Improvement Fund expenditures is greater than 10 percent, therefore a public hearing will be held and the following proposed budget adjustments are requested:

	Increase Appropriation	Decrease Appropriation
General Fund		
Transfer Out	$200,000	
Contingency		$200,000
	$200,000	**$200,000**

General Fund: Reduce Contingency and increase expenditure appropriation by $200,000 in Transfers Out due to the cost of the remodel of Pioneer Hall and Community Center.

	Increase Appropriation	Increase Resource
Capital Improvement Fund		
Public Works – Capital Outlay	$200,000	
Transfer In		$200,000
	$200,000	**$200,000**

Capital Improvement Fund: Recognize the Transfer In from the General Fund and appropriate the capital outlay requirements for the remodel of Pioneer Hall and Community Center. Per ORS 294.473, renumbered from 294.480, this budget adjustment brings the Capital Improvement Fund resources for the 2025-27 biennium budget to $958,634 and the Capital Improvement Fund, Public Works – Construction Capital Outlay requirements to $958,634.

SECTION 2. This resolution is effective upon adoption.

_____
Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this 21st day of April 2026.

_____
Tonya Graham, Mayor

Reviewed as to form:

_____
Johan Pietila, City Attorney

Council Business Meeting

Date: April 21, 2026

Agenda Item	Approval of a Construction Contract with Insituform Technologies, for the Wastewater Collection Rehabilitation– CIPP Construction Project (PW 2024-28)
Department	Public Works
From	Scott Fleury, Director

TIME ESTIMATE
Five Minutes

CATEGORY
Contract Approval - as the contract board, confirm proper procedure with a motion to approve.

SUMMARY
Before the Council acting as Contract Review Board (CRB) is a request to approve a construction contract with Insituform Technologies, for the Wastewater Collection and Storm Drain Cured In Place Pipe (CIPP) rehabilitation project. The project is identified in the current Capital Improvement Program for the City and funds are appropriated in the current budget for the rehabilitation work.

POLICIES, PLANS & GOALS SUPPORTED
Organization

- Quality infrastructure and facilities through timely maintenance and community investment

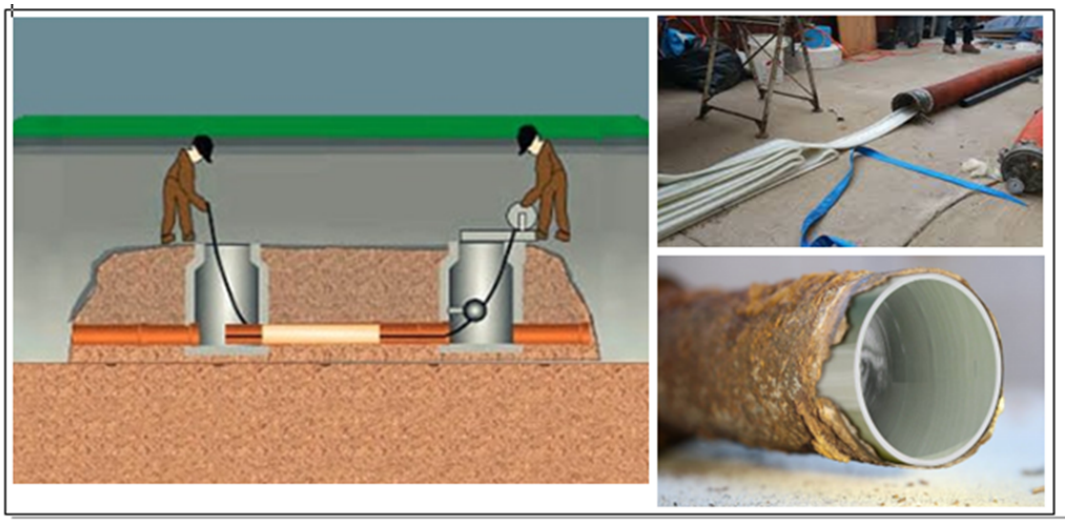
BACKGROUND AND ADDITIONAL INFORMATION
For wastewater (WW) collections and storm drain (SD) conveyance pipes there are generally two methods for replacement/maintenance. The first being open trench cutting and pipeline replacement. The second being CIPP linings. Open trench cutting and pipeline replacement is often the choice when upsizing is required or the pipes integrity is compromised and lining would not work. When upsizing is not required and piping is in a difficult to access location trenchless technology is a very good option to upgrade the conveyance pipe infrastructure.

CIPP is a trenchless rehabilitation method used to repair existing pipelines. It is a jointless, seamless pipe lining placed within an existing pipe. As one of the most widely used rehabilitation methods, CIPP has applications in sewer, water, gas, and chemical pipelines of varying diameters. The process of CIPP involves inserting and running a felt lining into a preexisting pipe that is the subject of repair. Resin within the liner is then exposed to a curing element to make it attach to the inner walls of the pipe. Once fully cured, the lining now acts as a new pipeline.

Public Works Wastewater staff developed a list of maintenance projects to be associated with CIPP repair in the current biennium for both WW collections and SD conveyances. These projects are for pipes that are in areas difficult to replace such as homeowner back yards, difficult traffic, challenging landscape, or areas with many utility conflicts. The resulting list of pipeline segments covers a majority of the maintenance related concerns that can be remedied by CIPP.
The benefits of the CIPP project are as follows:

- Reduce water infiltration into the wastewater collection system, lowering operating costs.
- Reduce the risk of sanitary sewer overflows.
- Adherence and improvement to regulatory compliance.
- Lower maintenance and operational costs by reducing the need for emergency maintenance, cleaning and reactive interventions.

- Significant extension of useful life to these pipelines.



As part of the formal contracting process required by procurement rules/regulations, Public Works generated and released an Invitation to Bid (ITB). The ITB was posted on OregonBuys on February 4, 2026, and documents were also on file at the City in the Community Development Building at 51 Winburn Way. The ITB was also formally advertised with the Daily Journal of Commerce. Two bids were received from Insituform Technologies and Express Sewer & Drain Inc. and opened on March 24, 2026, both deemed responsive. Insituform Technologies provided the lowest bid.

Insituform Technologies $897,905.00	Express Sewer & Drain Inc. $926,762.00

The outcome of the bid process is intended to result in a public improvement contract with the City of Ashland for supplying all labor, equipment, and materials necessary to construct the Wastewater Collection Rehabilitation-CIPP Project No. 2024-28. This project consists of installing Cured in Place Pipe (CIPP) Lining ranging from six inch to thirty six inches in diameter, with a combined total length of 9,524 feet and restoration of one hundred twenty (120) private service lateral reconnections. The project will also include associated traffic control and erosion control measures necessary for construction.

If the contract is approved by the City Council, activities would begin and May and last for approximately 45 days. Public Works staff will also work with City Administration to provide public notification of the project as necessary.

FISCAL IMPACTS

The 2025-27 Wastewater Division and Storm Drain Biennium Budget (BN) includes funds for contracted services (capital improvement program) in the amount of $500,000 and $150,000 respectively for this project. Public Works recommends award of a public improvement contract in the full amount of $897,905. This is more than the appropriated amount in the current CIP budget and the gap in funding would be filled using existing “infrastructure” and capital funding within the wastewater collections budget. This CIPP project would resolve approximately 60-75% of the existing issues and staff will postpone future CIPP appropriation requests until at least fiscal year 30 & 31 for this type of project.

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

Council, acting as the Local Contract Review Board, has the option to approve this contract or refer action back to staff to rebid the project or request that the project not be constructed.

I move to approve the construction contract with Insituform Technologies for the Wastewater Collection Rehabilitation-CIPP Project for a contract amount not to exceed $897,905.00.

REFERENCES & ATTACHMENTS

1. 2024-28 WWC-SD-CIPP-ITB-Final-Reduced Scope

INVITATION TO BID
FOR A PUBLIC WORKS CONSTRUCTION PROJECT

CITY OF ASHLAND, OREGON

Wastewater Collections and Storm Drainage-CIPP

Project Number: 2024-28

Project Type: Sewerline Construction

BIDS DUE BY: 02:00:00 pm PST 3/24/2026

Wastewater Collection and Storm Drainage-CIPP
Project No. 2024-28
Sewerline Construction

TIME AND PLACES OF RECEIVING BIDS (BID CLOSING)

Bid Closing for the work described above will be at 02:00:00 pm PST on the 24th day of March 2026. Bids will be received by Derek HuizingaBell, Project Manager at the following time and places:

Before 02:00:00 pm PST on the day of Bid Closing.

For Bids submitted by mail or parcel delivery service, send to:

City of Ashland
c/o Derek HuizingaBell, Project Manager
20 E. Main Street
Ashland, OR 97520

For Bids submitted by hand delivery, obtain a date stamp on the Bid and submit to:

City of Ashland
c/o Derek HuizingaBell, Project Manager
51 Winburn Way
Ashland, OR 97520

Bids, Bid modifications, and Bid withdrawals will not be accepted at or after 02:00:00 pm PST on the day of Bid Closing.

PLACE, TIME, AND DATE OF READING BIDS (BID OPENING)

Bid Opening for the work described above will be in the Siskiyou Room of the Community Development and Engineering Services Building, 51 Winburn Way, Ashland, Oregon, beginning at 02:00:00 pm on the day of Bid Closing.

COMPLETION TIME LIMIT

See Special Provisions Subsection 00180.50(h).

CLASS OF WORK

The Class of Work for this Project is the combination of 1) Earthwork and Drainage.

APPLICABLE SPECIAL PROVISIONS

The Special Provisions booklet applicable to the above-described work, for which Bids will be opened at the place, time, and date stated above, is that which contains the exact information as shown above.

Bidders are cautioned against basing their Bids on a booklet bearing any different description, date(s), Class of Project, or Class of Work.

Introduction and Table of Contents

All Contract Documents are listed below. Documents are either attached or bound separately and available from the Project Manager. All Documents bound separately are incorporated into the Contract Documents and have the same force and effect as though set forth in full herein.

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In the event of a conflict, Supplementary Conditions control over all Standard Specifications and other contract documents. To the extent Standard Specifications and other contract documents conflict, the more restrictive requirement or provision shall control, except where otherwise noted in the contract documents, addenda, or amendment.

PART III – MAPS – BOUND SEPARATELY

Pipe Segment Index, Pipe Depths & Maps

CHECKLIST FOR BID SUBMITTAL

1. Bid Schedule (Page 11-23)
   - ☐ Fill in bidder information on first page
   - ☐ Indicate amount of bid bond on paragraph 17
   - ☐ Indicate bidder status on paragraph 24
   - ☐ Indicate number of addenda received on paragraph 31
   - ☐ Fill in bidder information and sign paragraph 34
   - ☐ Fill in unit prices and amounts for all bid items
   - ☐ Fill in total bid amount

2. First Tier Subcontractor Disclosure Form
   - ☐ Fill in this form and include with bid schedule (or within 2 hours of closing) Page 20

3. Bid Bond
   - ☐ Provide 10% bid bond on form included on page 56

4. Statement of Qualifications
   - ☐ Fill in this form and include with bid schedule (or within 2 hours of closing) Page 21

5. Product Information Sheet
   - ☐ Fill in this form and include with bid schedule (or within 2 hours of closing) Page 23

CHECKLIST FOR CONTRACT SUBMITTAL

1. Standard Public Improvement Contract
   - ☐ Fill in contractor data and certification on page 2 and 3 of the contract forms
   - ☐ Sign on page 3 of the contract form

2. Certifications of Representation
   - ☐ Check all items that apply and sign

3. ☐ IRS Form W-9

4. ☐ Exhibit D – Certification Statement for Corporation as Independent Contractor

5. Performance Bond
   - ☐ Provide on form provided on page 58-59 (or approved surety form)

6. Payment Bond
   - ☐ Provide on form provided on page 60-61 (or approved surety form)

7. ☐ Insurance certifications as required by Exhibit C (page 53)

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PART I

BID & CONTRACT DOCUMENTS

INVITATION TO BID

CITY OF ASHLAND, OREGON
DEPARTMENT OF PUBLIC WORKS

WASTEWATER COLLECTION AND STORM DRAINAGE-CIPP, Project No. 2024-28

Notice is hereby given that sealed Bids for furnishing all materials, equipment, labor, and services for the WASTEWATER COLLECTION AND STORM DRAINAGE-CIPP PROJECT, PROJECT NO. 2024-28 will be physically received by Derek HuizingaBell, Senior Project Manager, Siskiyou Conference Room, Ashland Community Development located at 51 Winburn Way, Ashland, Oregon, (mailing address: 20 E. Main Street, Ashland OR 97520), until 02:00 PM PST (Siskiyou Conference Room Clock) on March 24, 2026, at which time Bids will be publicly opened and read aloud. Bids physically received after this date and time will not be considered. All Bids received prior to the due date and time and in proper form will be publicly opened and read in the Siskiyou Conference Room at the time set forth above as the deadline for receipt of Bids. Thereafter Bid documents shall be made available for public inspection. If the total amount of the contract to be awarded exceeds $250,000, the award of the contract must be approved by the Local Contract Review Board. A contract for work will be awarded or Bids may be rejected, separately or entirely, within thirty (30) days after the date and time set for Bid opening.

The general character of the work for this project includes supplying all labor, equipment, and materials necessary to complete the Wastewater Collection and Storm Drainage Rehabilitation project #2024-28, including, but not limited to, the following approximate quantities for major work items:

- **Install Cured-in-Place-Pipe CIPP Lining ranging from 6"-36" – 9,524 LF**
- **Service Line Reconnections – 120 ea.**

Contract Documents, including plans and specifications, may be examined at the following offices:

- **City of Ashland**
  Community Development & Engineering Services
  51 Winburn Way
  Ashland, OR 97520

Contract Documents, including plans and specifications, may be examined and downloaded at the following website:

- **OregonBuys**
  https;//oregonbuys.gov

No bid shall be received or considered unless the bidder is registered with the Construction Contractor's Board.

Bidders shall pre-qualify as provided by ORS Chapter 279C.430 and in accordance with the Standard Specifications for Public Works Construction, Oregon Chapter of APWA, for all classes of construction. Pre-qualification applications must be received by the City of Ashland at least five (5) calendar days prior to the date set for opening of the bids.

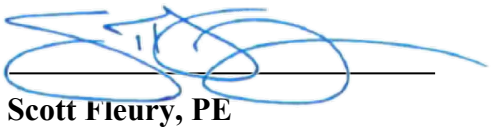
All projects in excess of $50,000.00 require the Contractor to pay prevailing wage rates. This contract requires the bidder to comply with Oregon's Prevailing Wage Rates.

The City reserves the right to reject any or all Bids in accordance with ORS 279C.395.

Bidders are encouraged to attend a non-mandatory pre-bid conference on 3/10/2026, @ 02:00:00 pm in the Siskiyou Conference Room, 51 Winburn Way, Ashland, Oregon.

By Order of the City Council
Ashland, Oregon

February 23, 2026



Scott Fleury, PE
Director of Public Works

CITY OF ASHLAND

BID AND BID SCHEDULE

TO FURNISH ALL PERMITS, LABOR, TOOLS, MACHINERY, MATERIALS, TRANSPORTATION, EQUIPMENT AND SERVICES OF ALL KINDS REQUIRED FOR THE CONSTRUCTION OF THIS PROJECT FOR THE CITY OF ASHLAND, JACKSON COUNTY, OREGON, AS STATED IN THE COMPLETED BID SCHEDULE, ALL IN ACCORDANCE WITH THE CONTRACT DOCUMENTS, PLANS, SPECIFICATIONS, AND DRAWINGS WHICH ARE ON FILE AT THE CITY OF ASHLAND, CITY HALL, 20 EAST MAIN STREET, ASHLAND, OREGON 97520.

NAME OF BIDDER _____

CONTACT _____

ADDRESS _____

CITY _____ **STATE** _____ **ZIP**_____

TELEPHONE NO._____

FAX NO. _____

EMAIL ADDRESS _____

To the Honorable Mayor and City Council
City Hall
City of Ashland
20 East Main Street
Ashland, Oregon 97520

In response to the City of Ashland's Invitation to Bid, this Bid is submitted as an offer by the undersigned to enter into a contract with the City of Ashland for furnishing all permits, labor, tools, machinery, materials, transportation, equipment and services of all kinds required for, necessary for, or reasonable incidental to, the construction of the Wastewater Collections and Storm Drainage-CIPP Project No 2024-28 (hereinafter "Project") for the City of Ashland, Oregon, as shown in the contract documents on file at City Community Development Building, which are a condition of this Bid as though they were attached. This offer is subject to the following declarations as to the acts, intentions and understandings of the undersigned and the agreement of the City of Ashland to the terms and prices herein submitted.

1. The undersigned has familiarized itself with the nature and extent of the Contract Documents, the project work, the site, the locality, the general nature of work to be performed by the City or others at the site that relates to the project work required by the Contract Documents, local conditions, and federal, state, and local Laws and Regulations that in any manner may affect cost, progress, performance, or furnishing of the project work.

2. The undersigned has obtained and carefully studied (or assumes responsibility for obtaining and carefully studying) examinations, investigation, exploration, tests, and studies which pertain to the conditions (subsurface or physical) at or contiguous to the site or otherwise and which may affect the cost, progress, performance, or furnishing of the project work as Contractor deems necessary for the performance and furnishing of the project work at the Contract Price, within the Contract Times, and in accordance with the other terms and conditions of the Contract Documents; and no additional or supplementary examinations, investigations, explorations, tests, reports, or similar information or data are or will be required by Contractor for such purposes.

3. It is understood that the City shall investigate and determine the qualifications of the apparent low responsive bidder prior to awarding the contract. The City shall reject any bid by a nonqualified or disqualified bidder. The City of Ashland reserves the right to reject for any good cause any or all bids, waive formalities, or to accept any bid which appears to serve the best interests of the City. The City reserves the right to reject any bid not in compliance with all prescribed public bidding procedures and requirements and may reject all bids for good cause upon a finding that it is in the public interest to do so. Evaluation of bids will be based on minimum requirements established by the specifications and compliance with conditions of the Notice to Contractors and Invitation to Bid, and compliance with City public contracting rules. Additional evaluation criteria are as follows: None.

4. The deadline to file a written protest or request, pursuant to the Instructions to Bidders to change contract terms, conditions or specifications is not less than ten (10) calendar days prior to bid opening. Bid closing may be extended by the City to consider a protest or request.

5. All of the contract documents, including all plans, specifications, and drawings have been examined and an examination of the site of the proposed work, together with such investigations as are necessary to determine the conditions to be encountered have been made by the undersigned and the terms and conditions of the contract and solicitation documents are hereby accepted, and that if this Offer is accepted, the undersigned will contract with the City of Ashland, Oregon, in a form substantially similar to that attached Agreement and agree to be bound to the terms and conditions of said contract and solicitation documents.

6. It is understood that the contract drawings may be supplemented by additional drawings and specifications in explanation and elaboration thereof and, if they are not in conflict with those referred to in paragraph 1 above, they shall have the same force and effect as though they were attached, and they shall be accepted as part of the contract when issued.

7. The undersigned agrees that upon written acceptance of this bid s/he will, within ten working days, of receipt of such notice, execute a formal contract agreement with the City. The undersigned further agrees that s/he will provide the following in order to execute the contract:

   Performance Bond and Corporate Surety Payment Bond, both in the amount equal to 100% of the awarded contract;

   Certificates of Insurance for Liability and property damage coverage;

   Certificates of Coverage for Workman Compensation and unemployment insurance;

   All other bonds, permits, licenses, etc. as required in the contract documents.

8. It is understood that all the work will be performed under a lump sum or unit price basis and that for the lump sum or unit price all services, materials, labor, equipment, and all work necessary to complete the project in accordance with the plans and specifications shall be furnished for the said lump sum or unit price named. It is understood that the quantities stated in connection with the price schedule for the

contract are approximate only and payment shall be made at the unit prices named for the actual quantities incorporated in the completed work. If there shall be an increase in the amount of work covered by the lump sum price, it shall be computed on a basis of "extra work" for which an increase in payment will have been earned and if there be a decrease in the lump sum payment, it shall be made only as a result of negotiation between the undersigned and the Owner. Furthermore, it is understood that any estimate with respect to time, materials, equipment, or service which may appear on the plans or in the specifications is for the sole purpose of assisting the undersigned in checking the undersigned's own independent calculations and that at no time shall the undersigned attempt to hold the Owner, the Engineer, or any other person, firm or corporation responsible for any errors or omissions that may appear in any estimate.

9. The undersigned submits the unit prices as those at which he will perform the work involved. The extensions of the column headed "ITEM TOTAL" are made for the sole purpose of facilitating bid comparisons and if there are any discrepancies between the unit prices and the total amount shown, the unit prices shall govern.

10. The undersigned agrees to furnish labor, tools, machinery, materials, transportations, equipment and services of all kinds required for, necessary for, or reasonably incidental to, construction of this Project with all appurtenant work as required by the plans and specifications of this Offer for the unit or lump sum prices in the "BID SCHEDULE".

11. In stating prices, it is understood that the prices include all materials and work required to complete the project in accordance with the Contract Documents, the plans and the specifications. If any material, item, or service required by the plans and specifications has not been mentioned specifically in the "BID SCHEDULE," the same shall be furnished and placed with the understanding that the full cost to the City has been merged with the several prices stated in the "BID SCHEDULE."

12. The City reserves the right to cancel this solicitation or to reject any and all bids in whole or in part when the cancellation or rejection is in the best interests of the City as determined by the City in accordance with ORS 279B.100

13. The foregoing prices shall include all labor, materials, equipment, overhead, profit, insurance, and all other incidental expenses to cover the finished work of the several kinds called for. Unit prices are to be shown in both words and figures. In case of any discrepancy, the amounts shown in words shall govern.

14. Upon receipt of written notice of the acceptance of its bid, Bidder shall execute a formal contract with the City within ten (10) days, deliver surety bond or bonds as required, and deliver required proof of insurance. The bid security attached in the sum of ten percent (10%) of the total price for the bid or combination of bids is to become the property of the Owner in the event the contract and bond are not executed within the time above set forth as liquidated damages for the delay and additional expense to the Owner caused thereby.

15. If the proposed bid price will exceed $50,000.00 the undersigned, as bidder, acknowledges that provisions of ORS 279C.800 to 279C.870 relating to workers on public works to be paid not less than prevailing rate of wage shall be included in the contract, or in the alternative, if the project is to be funded with federal funds and is subject to the Davis-Bacon Act (40 U.S.C. §276a) bidder agrees to comply with the Davis- Bacon Act requirements. "Prevailing Wage Rates for Public Works Contracts in Oregon," which are incorporated herein by reference, and can be accessed at: https://www.oregon.gov/boli/WHD/PWR/Pages/pwr_state.aspx

16. The undersigned shall furnish bonds required by the specifications and comply with the laws of the Federal Government, State of Oregon and the City of Ashland which are pertinent to construction

contracts of this nature even though such laws may not have been quoted or referred to in the specifications.

17. Accompanying this Offer is a certified check, cashier's check or a bid bond, for the sum of _____, payable to the City of Ashland, Oregon, this being an amount for ten percent (10%) of the total bid based upon the estimate of quantities at the above price according to the conditions of the advertisement. If this Offer is accepted by the City and the undersigned fails to execute a satisfactory contract and bonds as stated in the Advertisement within ten (10) working days from the date of notification, then the City may, at its option, determine that the undersigned has abandoned the contract and there upon this Offer shall be considered null and void, and the bid security accompanying this Offer shall be forfeited to and become the property of the City of Ashland. If the bid is not accepted, the bid security accompanying this Offer shall be returned to the undersigned.

18. The undersigned agrees to comply with the provisions of ORS 279C.800 to 279C.870, the Oregon Prevailing Wage law. The undersigned, as bidder, acknowledges that provisions of ORS 279C.800 to 279C.870 relating to workers on public works to be paid not less than prevailing rate of wage shall be included in the contract, or in the alternative, if the project is to be funded with federal funds and is subject to the Davis-Bacon Act (40 U.S.C. §276a), bidder agrees to comply with the Davis-Bacon Act requirements. The undersigned Contractor agrees to be bound by and will comply with the provisions of ORS 279C.838, 279C.840 or 40 U.S.C. 3141 to 3148. [OAR 137-049-0200(1)(a)(J)].

19. The undersigned certifies that the undersigned Contractor is not ineligible to receive a contract for a public work pursuant to ORS 279C.860. Bidder further agrees, if awarded a contract, that every subcontractor will be eligible to receive a contract for a public work pursuant to ORS 279C.860.

20. The undersigned certifies that the undersigned Contractor has not discriminated against minority, women or emerging small businesses enterprises in obtaining any required subcontracts. The bidder understands and acknowledges that it may be disqualified from bidding on this public improvement project as set forth in OAR 137-049-0370, including but not limited to City discovery a misrepresentation or sham regarding a subcontract or that the Bidder has violated any requirement of ORS 279A.110 or the administrative rules implementing the Statute.

21. The undersigned agrees that the time of completion shall be defined in the specifications, and further, the undersigned agrees to initiate and complete this Project by the date stated below.

    - The work shall be commenced within ten (10) business days after receipt of the written Notice to Proceed.
    - The work shall be completed on or before September 30, 2026.
    - The undersigned agrees that the "Time of Completion" shall be as defined in the specifications and that the bidder will complete the work on or before September 30, 2026, has been issued by the Owner. Bidder furthermore agrees to pay as liquidated damages, for each calendar day thereafter, the amounts shown in Standard Conditions, for each day the project remains incomplete.

22. The undersigned bidder is registered with the Oregon Construction Contractors Board (CCB), the registration is current and valid, and the bidder's registration number is stated below. [OAR 137-049-0230(1)] Bidder understands that failure to have a current CCB license shall result in rejection of this bid.

23. The undersigned bidder is licensed by the State Landscape Contractors Board, *if applicable*, the license is current and valid, and the bidder's registration number is stated below. [OAR 137-049-0200(1)(a)(K)] Bidder understands that failure to have a current LCB license shall result in rejection of this bid.

24. In determining the lowest responsible bidder, City shall, for the purpose of awarding the contract, add a percent increase on the bid of a non-resident bidder equal to the percent, if any, of the preference given to that bidder in the state in which the bidder resides. "Resident bidder" of Oregon means a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid, has a business address in this state and has stated in the bid that the bidder is a "resident bidder" of the State of Oregon. The undersigned represents him/her self in this bid to be either a Resident or a Nonresident bidder by completing the appropriate blank below.

    - The Bidder is _____ or is not _____ a Resident Bidder as defined in ORS 279A.120.

25. The undersigned hereby represents that no Councilor, Commissioner, officer, agency or employee of the City of Ashland is personally interested directly or indirectly in this Contract or the compensation to be paid hereunder and that no representation, statement or statements, oral or in writing, of the City, its Councilors, Commissioners, officers, agents or employees had induced him/her to enter into this Contract, and the papers made a part of its terms;

26. The undersigned has not directly or indirectly induced or solicited any person to submit a false or sham bid or refrain from bidding. The undersigned certifies that this bid has been arrived at independently and submitted without connection with any person, firm or corporation making a bid for the same material and is, in all respects, fair and without collusion or fraud.

27. The undersigned confirms that this firm has a Qualified Drug Testing Program for employees in place and will demonstrate this prior to award of contract. [OAR 137-049-0200(1)(c)(B)]

28. The undersigned confirms that if this contract involves asbestos abatement or removal, the bidder is licensed under ORS 468A.710 for asbestos removal. Asbestos abatement is not implicated in this contract.

29. The City of Ashland may waive minor informalities, reject any bid not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any or all bids upon a finding that it is in the public interest to do so.

30. The undersigned confirms that this offer is not contingent upon City's acceptance of any terms and conditions other than those contained in this Solicitation and the Contract Documents.

31. The bidder understands that the City reserves the right to make changes to the Notice to Contractors / Invitation to Bid and the resulting contract by written addenda, prior to the closing time and date. The City will transmit addenda to registered plan holders but shall publish notice of any addenda on the ORPIN website. The addenda may be downloaded or picked up at the Department of Public Works, 51 Winburn Way, Ashland, Oregon. The bidder must check the ORPIN website frequently until closing.

    The bidder acknowledges that the Addendum(s) listed below have been reviewed online or a copy obtained and considered as part of the submittal of this Offer and Bid Schedule.

    ADDENDUM NUMBER ____ THROUGH ____ HAVE BEEN REVIEWED

32. The bidder understands that the City will be awarding the contract to the Responsible Bidder with the lowest Responsive Bid. OAR 137-049-0200(1)(b)(C). Whether a bidder is responsible will be determined by ORS 279C.375 and the City's completion of the attached Bidder Responsibility Determination Form.

33. Instructions for First-Tier Subcontractors Disclosure.
Bidders are required to disclose information about certain first-tier subcontractors (those subcontractors contracting directly with the bidder) when the contract price exceeds $100,000 (see ORS 279C.370). Specifically, when the contract amount of a first-tier subcontractor is greater than or equal to: (i) 5% of the project bid, but at least $15,000, or (ii) $350,000 regardless of the percentage, you must disclose the following information about that subcontract within two working hours of bid closing:

- The subcontractor's name and address;
- The subcontractor's Construction Contractor Board registration number, if one is required, and;
- The subcontract dollar value.

If you will not be using any subcontractors that are subject to the above disclosure requirements, you are required to indicate "NONE" on the form. Failure to submit this form by the disclosure deadline will result in a non-responsive bid. A non-responsive bid will not be considered for award.

THE CITY MAY REJECT A BID IF THE BIDDER FAILS TO SUBMIT THE DISCLOSURE FORM WITH THIS INFORMATION WITHIN TWO HOURS OF BID CLOSING.

THIS DOCUMENT SHALL NOT BE FAXED. IT IS THE RESPONSIBILITY OF BIDDERS TO SUBMIT THIS DISCLOSURE FORM AND ANY ADDITIONAL SHEETS BY THE DEADLINE. SEE INSTRUCTIONS TO BIDDERS. <u>The disclosure should be submitted on the First-Tier Subcontractor Disclosure Form attached to this Invitation to Bid.</u>

34. **Bidder Information and Signature**

Firm Name of Bidder	Signature of Bidder
	Printed Name of Bidder
	Official Title
State of Incorporation	CCB Number

Dated this _____ day of _____ 20___.

Name of Bidder _____

Address _____

Telephone No. _____

BID SCHEDULE
Wastewater Collection Rehabilitation-CIPP
Project No. 2024-28

No.	Description	Spec. #	Qty	Unit	Unit Price Bid	Total Price Bid
1	Mobilization	00210	1	Lump Sum		
2	Temporary Work Zone Traffic Control	00223	1	Lump Sum		
3	Erosion Control	00280	1	Lump Sum		
4	Pollution Control Plan	00290	1	Lump Sum		
5	Mainline Video Inspection	00415	1	Lump Sum		
6	Internal Service Reinstatement	00412	120	Each		
7	Odor Mitigation Strategy or Scent Masking	00412	1	Lump Sum		
8	CIPP Liner, 6 Inch	00412	2612	LF		
9	CIPP Liner, 8 Inch	00412	4408	LF		
10	CIPP Liner, 10 Inch	00412	705	LF		
11	CIPP Liner, 12 Inch	00412	1464	LF		
12	CIPP Liner, 24 Inch	00412	0	LF		
13	CIPP Liner, 36 Inch	00412	335	LF		
				Total		

Name of Authorized Representative

Total Written in Dollars

Authorized Representative Signature

Date

FIRST-TIER SUBCONTRACTOR DISCLOSURE FORM

INSTRUCTIONS

Instructions for Submitting Form

Submit the First-Tier Subcontractor Disclosure form in any of the following manners:

- Not later than two working hours after the time set for opening Bids. (For example, before 11:00 a.m. after a 9:00 a.m. Bid Opening.) Submit according to one of the following methods:
- Print the form from the Bid Booklet, fill it in, and either:
    - Deliver to the following address where it can be time and date stamped

      City of Ashland
      Community Development and Engineering Services Building
      51 Winburn Way
      Ashland, OR 97520, or
    - FAX it to (541) 488-6006.

The Agency is not responsible for partial, failed, illegible, or partially legible FAX transmissions or electronic submissions.

Instructions for First-Tier Subcontractor Disclosure

Without regard to the amount of a Bidder's Bid, if the Agency's cost range for a public improvement project in the "Notice to Contractors", or in other advertisement or solicitation documents is greater than $100,000, bidders are required to disclose information about first-tier subcontractors that will furnish labor or labor and materials (See ORS 279C.370). Specifically, when the contract amount of a first-tier subcontractor is greater than or equal to: (1) 5% of the total project Bid, but at least $15,000, or (2) $350,000 regardless of the percentage of the total project Bid, you must disclose the following information about that subcontractor not later than two working hours after the time set for opening Bids:

- The name of the subcontractor
- The category of work that the subcontractor will be performing
- The dollar amount of the subcontract

If the Agency's cost range is greater than $100,000 and you will not be using any first-tier subcontractors, you are still required to submit the form, with the appropriate box checked or enter "NONE" on the first line.

If the Agency's cost range is greater than $100,000 and you are not subject to the above disclosure requirements, you are still required to submit the form, with the appropriate box checked or enter "NONE" on the first line.

THE AGENCY MUST REJECT BIDS if the Bidder fails to submit the disclosure form with this information by the stated deadline.

To determine disclosure requirements, the Agency recommends that you disclose subcontract information for any subcontractor as follows:

1) Determine the lowest possible prime contract price. That will be the base Bid amount less all alternate deductive Bid amounts (exclusive of any options that can only be exercised after Bid award).

2) Provide the required disclosure information for any first-tier subcontractor whose potential contract services are greater than or equal to: (1) 5% of the lowest contract price, but at least $15,000, or (2) $350,000 regardless of the percentage. Total all possible work for each subcontractor in making this determination, (for example, if a subcontractor will provide $15,000 worth of services on the base Bid and $40,000 on an additive alternate, then the potential amount of the subcontractor's services is $55,000. Assuming that $55,000 exceeds 5% of the lowest contract price, provide the disclosure for both the $15,000 services and the $40,000 services.)

FIRST-TIER SUBCONTRACTOR DISCLOSURE FORM

Project Name **Wastewater Collections and Storm Drainage - CIPP**

Project Number **2024-28**

Bid Opening Date

Name of Bidding Contractor

☐ *CHECK THIS BOX IF YOU WILL NOT BE USING ANY FIRST-TIER SUBCONTRACTORS OR IF YOU ARE NOT SUBJECT TO THE DISCLOSURE REQUIREMENTS (SEE INSTRUCTIONS)*

Firm Name	Dollar Amount
Category of Work	

Firm Name	Dollar Amount
Category of Work	

Firm Name	Dollar Amount
Category of Work	

Firm Name	Dollar Amount
Category of Work	

Firm Name	Dollar Amount
Category of Work	

Firm Name	Dollar Amount
Category of Work	

Firm Name	Dollar Amount
Category of Work	

(Attach additional sheets as necessary)

STATEMENT OF QUALIFICATIONS CURED-IN-PLACE PIPE INSTALLATION

This form shall be submitted with the bid to the Project Engineer for review and approval. It shall be submitted and approved prior to the issuance of the Notice to Proceed. The City of Ashland Engineering Division will be the sole judge in determining if the contractor meets the minimum personnel experience requirements. If the Contractor fails to comply with the minimum experience requirements stated in Section 00412.30, the Contractor shall bear all costs, including those for delays, for taking whatever steps necessary to provide personnel with the required experience.

The following information shall provide the name, business address, and information describing the contractor's superintendent and lateral cutter's experience.

Cured-in-Place Pipe Contractor Information

Contractor: _____

Address: _____

Phone:_____

Contact person:_____

Project Superintendent:_____

1) Project: _____ Date completed:

_____

Name and address of owner: _____

_____

Reference: _____ Telephone: _____

Pipe diameter: _____No of laterals restored: _____

Type and length of pipe liner: _____

Liner Foreman:_____

Lateral cutter's name:

_____

2) Project: _____ Date completed:

_____

Name and address of owner: _____

_____

Reference: _____ Telephone: _____

Pipe diameter: _____ No of laterals restored: _____

Type and length of pipe liner: _____

Liner Foreman: _____

Lateral cutter's name: _____

3) Project: _____ Date completed:

_____

Name and address of owner: _____

_____

Reference: _____ Telephone: _____

Pipe diameter: _____ No of laterals restored: _____

Type and length of pipe liner: _____

Liner Foreman: _____

Lateral cutter's name: _____

PRODUCT INFORMATION SHEET

Bidder:

_____

Address:

_____

City: _____ State: _____ Zip code:

_____

Telephone:_____ Fax:

_____

A: CIPP Liner Material Manufacture:

1. Liner manufacturer:

   _____

2. Resin manufacturer:

   _____

B: Cured in Place Products Type proposed for this project:

1. Liner tube type:

   _____

2. Resin type:

   _____

3. Flexural modulus – E (initial)

   _____

   si.

4. Pipe liner thickness: 6” _____ 8” _____ 10” _____ 12” _____ 24” _____ 36” _____

5. Installation method: ASTM F-1216 _____ ASTM F-1743 _____

6. Curing process:

   _____

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CITY OF ASHLAND

PUBLIC IMPROVEMENT CONTRACT

FOR
WASTEWATER COLLECTIONS AND STORM DRAINAGE - CIPP

PROJECT NO. 2024-28

This Public Improvement Contract (hereinafter "Contract") is entered into by and between the CITY OF ASHLAND, an Oregon municipal corporation (hereinafter "City"), and _____(hereinafter "Contractor").

NOW THEREFORE, for good and valuable consideration, the sufficiency of which is hereby acknowledged, the parties mutually covenant and agree as follows:

1. PROJECT MANAGER:

The City's Project Manager for this Contract is:

Derek HuizingaBell, City of Ashland Public Works Engineering Department.

2. WORK:

2.1. The Work under this Contract is for the *Wastewater Collections and Storm Drainage - CIPP Project No. 2024-28* as more fully described in the Contract Documents listed in Section 5 of EXHIBIT A, STANDARD TERMS AND CONDITIONS FOR PUBLIC IMPROVEMENT CONTRACTS. Contractor shall complete all Work as specified in the Contract Documents. The Work is generally described as follows: The installation of approximately 9,189 linear feet of 6–36-inch CIPP liner along with an estimated 120 Service Reinstatements. The Statement of Work, including the delivery schedule for the Work, is contained in the Contract Documents.

2.2. Contractor shall, at its own risk and expense, perform the Work described in the Contract Documents and furnish all permits, labor, tools, machinery, materials, transportation, equipment and services of all kinds required for, necessary for, or reasonable incidental to, performance of the Work, that is, the construction of the *Wastewater Collections and Storm Drainage - CIPP Project No. 2024-28*. Contractor shall secure all municipal, County, State, or Federal Permits or licenses including payment of permit fees, license fees, and royalties necessary for or incidental to the performance of the Work. The risk of loss for such Work shall not shift to the City until written acceptance of the Work by the City.

3. EFFECTIVE DATE AND DURATION:

This Contract is effective as of the date of execution by the City (the "Effective Date"). All Work under this Contract shall, unless otherwise terminated or extended, be completed on or before September 30, 2026.

4. CONSIDERATION

4.1. City agrees to pay Contractor, at the times and in the manner provided in the Contract Documents, the sum of _____ for performing the Work required by this Contract, including allowable expenses. This sum cannot be modified except by Change Order approved in writing by the City. Any progress payments to Contractor shall be made only in accordance with the schedule and the requirements as set forth in the Standard Terms and Conditions.

4.2. City certifies that sufficient funds have been appropriated to make payments required by this Contract during the current fiscal year. Contractor understands and agrees that City's payment of amounts under this Contract attributable to Work performed after the last day of the current fiscal year is contingent upon City appropriations, or other expenditure authority sufficient to allow City in the exercise of its reasonable discretion, to continue to make payments under this Contract. In the event City has insufficient appropriations, limitations or other expenditure authority, City may terminate this Contract without penalty or liability to City, effective upon the delivery of written notice to Contractor, with no further liability to Contractor.

5. CONTRACTOR'S REPRESENTATIONS

In order to induce City to enter into this Contract, Contractor makes the following representations:

Contractor has examined and carefully studied the Contract Documents, and any data and reference items identified in the Contract Documents.

5.2. Contractor has visited the Site, conducted a thorough, alert visual examination of the Site and adjacent areas, and become familiar with and is satisfied as to the general, local, and Site conditions that may affect cost, progress, and performance of the Work.

5.3. Contractor is familiar with and is satisfied as to all laws and regulations that may affect cost, progress, and performance of the Work.

5.4. Contractor has carefully studied all drawings of physical conditions relating to existing surface or subsurface structures at the Site that have been identified in the Supplementary Conditions, especially with respect to Technical Data in such reports and drawings, and reports and drawings relating to Hazardous Environmental Conditions, if any, at or adjacent to the Site that have been identified in the Supplementary Conditions, especially with respect to Technical Data in such reports and drawings.

5.5. Contractor has considered the information known to Contractor itself; information commonly known to contractors doing business in the locality of the Site; information and observations obtained from visits to the Site; the Contract Documents; and the Site-related reports and drawings identified in the Contract Documents, with respect to the effect of such information, observations, and documents on (1) the cost, progress, and performance

of the Work; (2) the means, methods, techniques, sequences, and procedures of construction to be employed by Contractor; and (3) Contractor's safety precautions and programs.

5.6. Based on the information and observations referred to in the preceding paragraph, Contractor agrees that no further examinations, investigations, explorations, tests, studies, or data are necessary for the performance of the Work at the Contract Price, within the Contract Times, and in accordance with the other terms and conditions of the Contract.

5.7. Contractor is aware of the general nature of work to be performed by City and others at the Site that relates to the Work as indicated in the Contract Documents.

5.8. Contractor has given City written notice of all conflicts, errors, ambiguities, or discrepancies that Contractor has discovered in the Contract Documents, and the written resolution thereof by City is acceptable to Contractor.

5.9. The Contract Documents are generally sufficient to indicate and convey understanding of all terms and conditions for performance and furnishing of the Work.

6. GOVERNING LAW

The provisions of this Contract shall be construed in accordance with the laws of the State of Oregon. Any action or suits involving any question arising under this contract must be brought in the appropriate court in Jackson County, Oregon. If the claim must be brought in a federal forum, then it shall be brought and conducted in the United States District Court for the District of Oregon. Contractor, by the signature herein of its authorized representative, hereby consents to the *in-persona* jurisdiction of said courts. In no event shall this section be construed as a waiver of the City of any form of defense or immunity.

CONTRACTOR DATA, CERTIFICATION, AND SIGNATURE

Business Name (please print): _____

Contact Name: _____Phone:_____ Fax: ___

Address _____

Do Not Write Federal and State Tax ID Numbers on this Agreement: One copy of W-9 is to be submitted with the signed contract to be kept on file in the City of Ashland Finance Department.

Ashland Business License #_____ Construction Contractors Board #_____

Citizenship: Nonresident alien _____ Yes _____ No

Business Designation (check one): _____ Individual ____ Sole Proprietorship ____ Partnership _____ Corporation ____ Government/Nonprofit

The above information must be provided prior to contract approval. Payment information will be reported to the Internal Revenue Service (IRS) under the name and taxpayer I.D. number provided above. (See IRS 1099 for additional instructions regarding taxpayer ID numbers.) Information not matching IRS records could subject you to 31 percent backup withholding.

I, the undersigned, understand that the Standard Terms and Conditions For Public Improvement Contracts **(Exhibit A)** together with **Exhibits B through J** together with all other Contract Documents as described in Standard Terms and Conditions Section 5 below, and the separately bound Oregon 2018 Standard Specifications for Construction, as amended by the City of Ashland's most recent Addenda to the 2018 Standard Specifications are an integral part of this contract and agree to perform the work described in the Contract Documents, including **Exhibit A,** in accordance with the terms and conditions of this contract. I further understand the City is prohibited from entering into a contract when the contractor has neglected or refused to file any return, pay any tax, or properly contest a tax, pursuant to ORS 305.385; I hereby certify, under penalty of perjury and false swearing, that I/my business am/is not in violation of any Oregon tax laws; I further certify that the certification and representations in Standard Term and Condition # 16 [CCB Registration Requirements] are true and correct, and further I certify that I am an independent contractor as defined in ORS 670.600.

CONTRACTOR:

_____
Signature/Title

_____
Printed name

_____
Date

NOTICE TO CONTRACTOR: This contract does not bind the City of Ashland unless and until it has been executed by the Public Contracting Officer or designee.

CITY OF ASHLAND SIGNATURE

CITY:

_____
City Administrator, City of Ashland

_____
Date

ATTACHMENTS: Certificate of Representation
Standard Terms & Conditions
Bid Schedule
Insurance Requirements

CERTIFICATE OF REPRESENTATION

Contractor, under penalty of perjury, certifies that:

(a) The number shown on this form is its correct taxpayer ID (or is waiting for the number to be issued to it; and

(b) Contractor is not subject to backup withholding because

(i) it is exempt from backup withholding or

(ii) it has not been notified by the Internal Revenue Service (IRS) that it is subject to backup withholding as a result of a failure to report all interest or dividends, or

(iii) the IRS has notified it that it is no longer subject to backup withholding. Contractor further represents and warrants to City that

(a) it has the power and authority to enter into and perform the work,

(b) the Contract, when executed and delivered, shall be a valid and binding obligation of Contractor enforceable in accordance with its terms, and

(c) The work under the Contract shall be performed in accordance with the highest professional standards, and

(d) Contractor is qualified, professionally competent and duly licensed to perform the work. Contractor also certifies under penalty of perjury that its business is not in violation of any Oregon tax laws, and it is a corporation authorized to act on behalf of the entity designated above and authorized to do business in Oregon or is an independent contractor as defined in the contract documents, and has checked four or more of the following criteria:

_____ (1) I carry out the labor or services at a location separate from my residence or is in a specific portion of my residence, set aside as the location of the business.

_____ (2) Commercial advertising or business cards or a trade association membership are purchased for the business.

_____ (3) Telephone listing is used for the business separate from the personal residence listing.

_____ (4) Labor or services are performed only pursuant to written contracts.

_____ (5) Labor or services are performed for two or more different persons within a period of one year.

_____ (6) I assume financial responsibility for defective workmanship or for service not provided as evidenced by the ownership of performance bonds, warranties, errors and omission insurance or liability insurance relating to the labor or services to be provided.

_____

Contractor Date

STANDARD TERMS AND CONDITIONS FOR PUBLIC IMPROVEMENT CONTRACTS (EXHIBIT A)

1. Contractor is Independent Contractor

a. Contractor shall perform the work required by this Contract as an independent contractor.

b. The Contractor represents and warrants that Contractor (i) is not currently an employee of the federal government or the State of Oregon, and (ii) meets the specific independent contractor standards of ORS 670.600, as certified on the Independent Contractor Certification Statement attached as **Exhibit D**.

c. Contractor will be responsible for any federal or state taxes applicable to any compensation or payment paid to Contractor under this contract.

d. Contractor is not eligible for any federal Social Security, unemployment insurance, state Public Employees' Retirement System, or workers' compensation benefits from compensation or payments to Contractor under this contract.

2. Subcontracts and Assignment

Contractor shall not subcontract any of the work required by this contract, or assign, sell, dispose of, or transfer any of its interest in this contract, nor delegate duties under the contract, either in whole or in part, without the prior written consent of the City. Such consent if provided shall not relieve the Contractor of any of the obligations under the contract. Any assignee or transferee shall be considered the agent of the contractor and be bound to abide by all provisions of the contract. If the City consents in writing to an assignment, sale, disposal or transfer of the Contractor's rights or delegation of Contractor's duties, the Contractor and its Surety, if any, shall remain liable to the City for complete performance of the Contract as if no such assignment, sale, disposal, transfer or delegation had occurred unless the City otherwise agrees in writing. [OAR 137-049-0200(2)]

Use of Subcontractors, material suppliers or equipment suppliers shall in no way release Contractor from any obligations of contract with City. Contractor will provide in all subcontract agreements that the Subcontractor, material supplier and equipment supplier will be bound by the terms and conditions of this Contract to the extent that they relate to the Subcontractor's work, material or equipment. All Subcontracts are assignable to the City at City's option, in the event this agreement is terminated for default of Contractor.

Contractor covenants and agrees to bind any and all subcontractors for performance of work under this Contract in the same manner Contractor is bound to City. Contractor further agrees that if subcontractors are employed in the performance of this contract, the Contractor and its subcontractors are subject to the requirements and sanction of ORS Chapter 656, Workers' Compensation.

3. No Third-Party Beneficiaries

City and Contractor are the only parties to this Contract and are the only parties entitled to enforce its terms. Nothing in this Contract gives or provides any benefit or right, whether directly, indirectly, or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this Contract.

Successors in Interest

The provisions of this Contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective successors and approved assigns, if any.

4. Contract Documents

The Contract Documents, which comprise the entire Contract between the City and Contractor, include all sections or parts of the bid package however denominated, including all documents and plans attached or referenced therein, the Notice to Contractors - Invitation to Bid, Offer, First-Tier Subcontractors Disclosure Form, Surety Bond, Public Improvement Contract, Contract Standard Terms and Conditions and Exhibits thereto, Performance Bond, Payment Bond, Special Provisions, Plans entitled "**Wastewater Collections and Storm Drainage-CIPP No. 2024-28**", Construction Drawings, Standard Drawings**,** and Contract Addendums, all attached hereto, and incorporated herein by this reference, together with the *Prevailing Wage (BOLI) if applicable AND any other separately bound reference*, Oregon 2018 Standard Specifications for Construction, and City of Ashland Addenda, incorporated herein by this reference. All exhibits, schedules and lists attached to the Contract Documents, or delivered pursuant to the Contract Documents, shall be deemed a part of the Contract Documents and incorporated herein, where applicable, as if fully set forth herein.

5. Contractor's Representations

By executing this contract, the Contractor hereby certifies that the representations made by the Contractor in the Contract Documents, including specifically the Offer, are true and correct and are incorporated herein by this reference. Contractor further certifies that Contractor has given the City written notice of conflicts, errors, ambiguities, or discrepancies that it has discovered in the Contract Documents, and the written resolution thereof by the City is acceptable to the Contractor, and the Contract Documents are generally sufficient to indicate and convey understanding of terms and conditions for performing and furnishing the project work.

6. Drug Testing [ORS 279C.505(2)]

a. Contractor shall certify to the City that it has a drug-testing program in place for all its employees that includes, at a minimum, the following:

   i. A written employee drug-testing policy,

   ii. Required drug testing for all new Subject Employees or alternatively, required testing of all Subject Employees every 12 months on a random selection basis, and

   iii. Required testing of a Subject Employee when the Contractor has reasonable cause to believe the Subject Employee is under the influence of drugs.

b. A drug-testing program that meets the above requirements will be deemed a "Qualifying Employee Drug-testing Program." For the purposes of this section, an employee is a "Subject Employee" only if that employee will be working on the Public Improvement project job site.

c. By executing and returning this contract the Contractor certifies, represents and warrants to the City that a Qualifying Employee Drug-testing Program is in place at the time of execution,

will continue in full force and effect for the duration of this contract, and that Contractor will comply with the provisions of subsection (d) below. Further, the City's performance obligation (which includes, without limitation, the City's obligation to make payment) is contingent on Contractors compliance with this representation and warranty.

d. Contractor will require each subcontractor providing labor for the project to:

   i. Demonstrate to the Contractor that it has a Qualifying Employee Drug-testing Program for the subcontractor's Subject Employees, and represent and warrant to the Contractor that the Qualifying Employee Drug-testing Program is in place at the time of subcontract execution and will continue in full force and effect for the duration of the subcontract; or

   ii. Require that the subcontractor's Subject Employees participate in the Contractor's Qualifying Employee Drug-testing Program for the duration of the subcontract.

7. Notice to Proceed

Written Notice to Proceed will be given by the City after the Contract has been executed and the Performance Bond, Payment Bond, and all required insurance documents approved. Notice To Proceed shall not be unreasonably delayed and shall generally occur within thirty (30) days of the contract date. Reasonable delay may be occasioned by the need to obtain necessary permits or easements or utility relocation. The Contractor shall commence the project work within ten (10) days of the date of the written Notice to Proceed. Contractor is not to commence work under the Contract prior to such written notice.

8. Suspension of the Work

The City, and its authorized representatives, may suspend portions or all of the project work due to causes including, but not limited to:

a. Failure of the Contractor to correct unsafe conditions;
b. Failure of the Contractor to carry out any provision of the Contract;
c. Failure of the Contractor to carry out orders;
d. Conditions, in the opinion of the City, which are unsuitable for performing the project work;
e. Allowance of time required to investigate differing site conditions;
f. Any reason considered to be in the public interest.

The contract time will not be extended, nor will the Contractor be entitled to any additional compensation if the work is suspended pursuant to subsections (a), (b) or (c). If the project work is suspended pursuant to subsection (f), the Contractor is entitled to a reasonable extension of the contract time and reasonable compensation for all verified costs resulting from the suspension plus a reasonable allowance for overhead with respect to such costs. Contractor shall not be paid on account of loss of anticipated profits or revenue or other economic loss arising out of or resulting from such termination. The foregoing provision concerning compensation in the event of a suspension of Work of this contract shall not apply if such suspension occurs as a result of the Contractor's violation of any Federal, State, or Local statutes, ordinances, rules or regulations, or as a result of any violation by the Contractor of the terms of this contract, including a determination by the City that the Contractor has not progressed satisfactorily with the Work in accordance with specifications.

9. Early Termination

a. The City and the Contractor, by mutual written agreement, may terminate this Contract at any time.

b. The City, on 30 days written notice to the Contractor, may terminate this Contract for any reason deemed appropriate in its sole discretion.

c. The City may terminate this contract, in whole or in part, at any time for any reason considered by the City, in the exercise of its sole discretion, to be in the public interest. The City will provide the Contractor, and the Contractor's surety, seven (7) days prior written notice of a termination for public convenience.

d. Either the City or the Contractor may terminate this Contract in the event of a breach of the Contract by the other. Prior to such termination, however, the party seeking the termination shall give to the other party written notice of the breach and of the party's intent to terminate. If the Party has not entirely cured the breach within 15 days of the notice, then the party giving the notice may terminate the Contract at any time thereafter by giving a written notice of termination.

10. Payment on Early Termination

a. If this contract is terminated under 10(a), (b), or (c), the City shall pay the Contractor for work performed in accordance with the Contract prior to the termination date.

b. If this contract is terminated under 10(d), by the Contractor due to a breach by the City, then the City shall pay the Contractor as provided in subsection (a) of this section.

c. If this contract is terminated under 10(d), by the City due to a breach by the Contractor, then the City shall pay the Contractor as provided in subsection (a) of this section, subject to set off of excess costs, as provided for in section 12, Remedies.

11. Remedies

In the event of termination under 10(d), by the City due to a breach by the Contractor, then the City may complete the work either itself, by agreement with another contractor, or by a combination thereof. In the event the cost of completing the work exceeds the remaining unpaid balance of the total compensation provided under this contract, then the Contractor shall pay to the City the amount of the reasonable excess. After notice of termination under paragraph 10(c), the Contractor and the Contractor's surety shall provide the City with immediate and peaceful possession of the Project site and premises, and materials located on and off the Project site and premises for which the Contractor received progress payment. In no circumstances shall Contractor be entitled to lost profits due to termination.

The remedies provided to the City under section 10 through 12 for a breach by the Contractor shall not be exclusive. The City also shall be entitled to any other equitable and legal remedies that are available.

In the event of breach of this Contract by the City, then the Contractor's remedy shall be limited to termination of the Contract and receipt of payment as provided in section 11(b).

12. Access to Records

Contractor shall maintain, and the City and its authorized representatives shall have access to all books, documents, papers and records of Contractor which relate to this contract for the purpose of making audit, examination, excerpts, and transcripts for a period of three years after final payment. Copies of applicable records shall be made available upon request. Payment for cost of copies is reimbursable by the City.

13. Ownership of Work

All work products of the Contractor that result from this contract, including but not limited to background data, documentation and staff work that is preliminary to final reports, are the property of City. Draft documents and preliminary work submitted to the City for review and comment shall not be considered as owned, used or retained by the City until the final document is submitted.

The City shall own all proprietary rights, including but not limited to copyrights, trade secrets, patents and all other intellectual or other property rights in and to such work products. Pre-existing trade secrets of the Contractor shall be noted as such and shall not be considered as a work product of this contract. All such work products shall be considered "works made for hire" under the provisions of the United States Copyright Act and all other equivalent laws.

Use of any work product of the Contractor by the City for any purpose other than the use intended by this contract is at the risk of the City. Use of any work product by Contractor is prohibited without the written consent of the City. All documents or other materials submitted to City by Contractor shall become the sole and exclusive property of City. Such materials are subject to Oregon Public Records laws.

14. Compliance with Applicable Law

Contractor certifies and shall comply and require all Subcontractors to comply with all federal, state, and local laws and ordinances, including specifically City of Ashland and State of Oregon Public contracting laws and rules applicable to the work under this Contract, including without limitation ORS Chapter 279A, ORS Chapter 279B, ORS Chapter 279C, ORS 279C.500 through 279C.670, and specifically ORS 279A.120(3), ORS 279C.515, ORS 279C.520, ORS 279C.530, ORS 279C.830 and ORS 279C.580 as set forth on **Exhibit B, attached hereto and made a part hereof by this reference** In addition, the provisions of ORS 279C.360, ORS 279C.365(4), and ORS 279C.370 (Bid Documents and Disclosure); ORS 279A.010(p), 279A.120, 279C.375, and 279C.380(4), (Award of Contract and Bond); ORS 279A.110 (Prohibition on Discrimination in Subcontracting); ORS 279C.585 (Substitution first-tier Subcontractor); ORS 279C.650 to 279C.670 (Termination); ORS 279C.520, ORS 279C.540, 279C.545 (Hours); ORS 279C.800 to 279C.870 (Oregon Prevailing Wage Law), if applicable; ORS 279C.550 to 279C.565 (Retainage); ORS 279C.4570 (Payments); and ORS 279C.600 to 279C.625 (Bonds) ORS 279A.125 (Recyclable Products) are all incorporated into this contract by this reference as though set forth in full. Without limiting the foregoing, Contractor expressly agrees to comply with: (i) any requirements of the DAVIS BACON ACT (40 U.S.C. 3142 and applicable Davis- Bacon Related Acts; (ii) Title VI of the Civil Rights Act of 1964; (iii) Section V of the Rehabilitation Act of 1973; (iv) the Americans with Disabilities Act of 1990, (v) ORS 659A.142, (vi) all regulations and administrative rules established pursuant to those laws; and (vii) all other applicable requirements of federal and state civil rights and rehabilitation statues, rules and regulations. In addition, Contractor expressly agrees to comply with all federal and state tax laws. A condition or clause required by law to be in this contract shall be considered included and incorporated into the Contract and made a part hereof by these references.

15. Registration with Construction Contractor's Board

The Contractor, hereby certifies that the Contractor is licensed with the Construction Contractors Board or licensed by the State Landscape Contractor's Board in accordance with ORS 701.035 to 701.055 and, further, that all subcontractors performing work as described in ORS 701.005(2) (i.e., construction work) will be licensed with the Construction Contractors Board or licensed by the State Landscape Contractor's Board in accordance with ORS 701.035 to 701.055 before the subcontractors commence work under the contract.

16. Prevailing Wages/ BOLI Fee

a. Contractor shall certify in the Contract and it shall be a condition of the bond, as provided in ORS 279C.800 through 279C.870, that in performing this Contract, Contractor will pay and cause to be paid not less than the prevailing rate of wages as of the date of the Public Notice, per hour, per day, and per week for and to each and every worker who may be employed in and about the performance of the Contract. In accordance with ORS 279C.838, each worker in each trade or occupation employed in the performance of the Contract either by Contractor, subcontractor or other person doing or contracting to do or contracting for the whole or any part of the work on the Contract shall be paid not less than the applicable state or federal prevailing rate of wage, whichever is higher. Copies of the current BOLI prevailing wage schedule and federal wage rate schedule, if applicable, can be found at the following website: https://www.oregon.gov/boli/WHD/PWR/Pages/pwr_state.aspx. When both federal and state prevailing wages are required to be included in the contract specifications, the City shall also include in the specifications information showing which prevailing rate of wage is higher for workers in each trade or occupation in each locality, as determined by the Commissioner of the Bureau of Labor and Industries under ORS 279C.815 (2)(c).

b. Contractor shall be bound by and shall fully comply with ORS 279C.800 to 279C.870, Oregon's Prevailing Wage Law. CONTRACTOR AGREES TO BE BOUND BY AND WILL COMPLY WITH PROVISIONS OF ORS 279C.840. Pursuant to ORS 279C.830(1), the existing prevailing rate of wage that may be paid to workers in each trade or occupation required, in the form of a BOLI document, is included in the contract and bid documents and made a part hereof by this reference. For public works for which the contract price is $50,000 or more, all workers shall be paid not less than such specified minimum hourly rate of wage. [ORS 279C.830(1)]

c. The City of Ashland shall pay the fee to the Commissioner of the Bureau of Labor and Industries pursuant to the administrative rule of the commissioner and as provided in ORS 279C.825(1). The fee shall be paid on or before the first progress payment or 60 days from the date work first begins on the Contract, or as otherwise provided by administrative rule, whichever is the earliest date. The fee is payable to the Bureau of Labor and Industries Wage and Hour Division Prevailing Wage Unit 800 N.E. Oregon Street #32 Portland Oregon 97232.

d. Contractor and some subcontractors shall also file with the Construction Contractors Board a public works bond with a corporate surety authorized to do business in this state in the amount of $30,000 as required by ORS 279C.836 and shall cause all subcontractors to do the same prior to starting work on the project. [ORS 279C.830(2)] The bond must provide that the contractor or subcontractor will pay claims ordered by the Bureau of Labor and Industries to workers performing labor upon public works projects. The bond must be a continuing obligation, and the surety's liability for the aggregate of claims that may be payable from the bond may not exceed the penal sum of the bond. The bond must remain in effect continuously until depleted by claims paid under this section, unless the surety sooner cancels the bond.

Contractor shall verify that subcontractors have complied with this requirement prior to permitting the subcontractor to start work on the project.

e. If the Contract is for a public work and the Contract price is $50,000 or more, Contractor shall supply and file, and require every Subcontractor to supply and file, with the City and with the Wage and Hour Division, Bureau of Labor and Industries (BOLI), 800 NE Oregon #32, Portland, Oregon 97232 a certified statement in writing that conforms to the requirements of ORS 279C.845.

17. Hours of Labor /Overtime limitation [ORS 279C.520] [ORS 279C.540] [ORS 279C.545]

Pursuant to ORS 279C.520, no person may be employed for more than 10 hours in any one day, or 40 hours in any one week, except in cases of necessity, emergency or when the public policy absolutely requires it, and in such cases, except in cases of contracts for personal services, the employee shall be paid at least time and a half pay:

(a)

(1) For all overtime in excess of eight hours in any one day or 40 hours in any one week when the work week is five consecutive days, Monday through Friday; or

(2) For all overtime in excess of 10 hours in any one day or 40 hours in any one week when the work week is four consecutive days, Monday through Friday; and

(b) For all work performed on Saturday and on any legal holiday specified in ORS 279C.540.

(c) Collective bargaining and negotiated labor agreements may provide exceptions to the requirements of this section and from ORS 279C.520 and ORS 279C.540.

(d) When labor is employed by the City through another as a contractor, any worker employed by the contractor shall be foreclosed from the right to collect for any overtime provided in ORS 279C.540 unless a claim for payment is filed with the contractor within 90 days from the completion of the contract, providing the contractor has:

(1) Caused a circular clearly printed in boldfaced 12-point type font and containing a copy of this section to be posted in a prominent place alongside the door of the timekeeper's office or in a similar place that is readily available and freely visible to workers employed on the work.

(2) Maintained the circular continuously posted from the inception to the completion of the contract on which workers are or have been employed.

(e) At or before the commencement of work, the Contractor shall give notice in writing to employees or by posting, of the number of hours and days per week the employees may be required to work. [279C.520(2)(5)]

18. Medical Care and Workers Compensation [ORS 279C.530]

(1) Pursuant to ORS 279C.530(1), Contractor shall promptly, as due, make payment to any person, co-partnership, association or corporation furnishing medical, surgical and hospital care services or other needed care and attention, incident to sickness or injury, to the employees of the contractor, of all sums that the contractor agrees to pay for the services and all moneys and sums that the contractor collected or deducted from the wages of employees under any law, contract or agreement for the purpose of providing or paying for the services.

(2) Pursuant to ORS 279C.530(2), All employers, including Contractor, that employ subject workers who work under this contract in the State of Oregon shall comply with ORS

656.017 and provide the required Workers Compensation coverage unless such employers are exempt under ORS 656.126. Contractor shall ensure that each of its subcontractors complies with these requirements.

19. Retainage

The withholding of retainage by a contractor or subcontractor on public improvement contracts shall be in accordance with ORS 701.420. [ORS 279C.555] "Retainage" means the difference between the amount earned by a contractor on a public improvement contract and the amount paid on the contract by the City. [ORS 279C.550] Moneys retained by a contracting agency under ORS 279C.570(7) shall either be: (a) retained in a fund by the City and paid to the contractor in accordance with ORS 279C.570; or (b) At the election of the contractor, paid to the contractor in accordance with the two options below:

- The contractor may deposit bonds, securities, or other instruments with the City or in any bank or trust company to be held in lieu of the cash retainage for the benefit of the contracting agency. In such event the City shall reduce the retainage in an amount equal to the value of the bonds, securities or instruments. and pay the amount of the reduction to the contractor in accordance with ORS 279C.570. Interest on the bonds or securities shall accrue to the contractor. {or}
- If the contractor elects, the City shall deposit the retainage, as accumulated, in an interest-bearing account in a bank, savings bank, trust company or savings association for the benefit of the City. Earnings on the account shall accrue to the contractor.

If the contracting agency incurs additional costs as a result of the exercise of the options in ORS 279C.560(1) or (5), the City may recover such costs from the contractor by reduction of the final payment. As work on the contract progresses, the contracting agency shall, upon demand, inform the contractor of all accrued costs. Bonds and securities deposited or acquired in lieu of retainage, as permitted above, shall be of a character approved by the City Attorney and City Finance Director, including but not limited to:

a. Bills, certificates, notes or bonds of the United States.
b. Other obligations of the United States or its agencies.
c. Obligations of any corporation wholly owned by the federal government.
d. Indebtedness of the Federal National Mortgage Association.
e. General obligation Bond of the State of Oregon or a political subdivision thereof.

Unless the City finds that accepting a bond or instrument poses an extraordinary risk that is not typically associated with such bond or instrument, the contractor may deposit a surety bond for all or any portion of the amount of funds retained, or to be retained, by the City in a form acceptable to the City. The bond and any proceeds there from shall be made subject to all claims and liens and in the same manner and priority as set forth for retainage under ORS 279C.550 to 279C.570 and 279C.600 to 279C.625. The City shall reduce the retainage in an amount equal to the value of the bond and pay the amount of the reduction to the contractor in accordance with ORS 279C.570. Whenever a City accepts a surety bond from a contractor in lieu of retainage, the contractor shall accept like bonds from any subcontractor or supplier from which the contractor has retainage. The contractor shall then reduce the retainage in an amount equal to the value of the bond and pay the amount of the reduction to the subcontractor or supplier. [279C.560]

20. Progress Payments

a. Payment for all work under the Contract will be made promptly by the City at the price or prices bid, and those prices shall include full compensation for all approved incidental work.

b. Contractor shall make progress estimates of work performed in any calendar month and submit to the City for approval, before the fifth of the following month, or as mutually agreed between the Contractor and City. These estimates shall include value of labor performed and materials incorporated in the work since commencing work under the Contract. Such estimates need not be made by strict measurements and may be approximate only and shall be based upon the whole amount of money that will become due according to terms of the Contract when Project has been completed. The City may include in payments eighty five percent (85%) of the cost to Contractor of materials or equipment not yet incorporated in the Work but delivered and suitably stored at the site, or at some other location agreed upon in writing. Such a payment shall be conditioned upon submission by the Contractor of bills of sale or such other documentation satisfactory to the City Attorney to establish the City's title to such materials or equipment or otherwise protect the City's interest including applicable insurance and transportation to the site, and a statement from Contractor explaining why it is necessary to procure said equipment and/or materials. When such payments are made, the Contractor warrants and guarantees that the title to all materials and equipment covered by a progress payment, whether incorporated in the project or not, will pass to the City upon receipt of such payment by the Contractor, free and clear of all liens, claims, security interests or encumbrances. Notwithstanding the above, when the progress estimate indicates that the progress payment would be less than one thousand dollars ($1,000), no progress payment will be made for that estimate period, unless approved by the City.

c. If the Contract price is determined, in whole or in part, on a Lump Sum basis, Contractor shall prepare an itemized cost breakdown relating thereto and have the City approve same before commencing work; progress estimates based on said itemized cost breakdown may be the basis for progress payments. Upon direction by the City, Contractor shall provide for revision of the costs breakdown to reflect the true costs of the work as it progresses.

d. If the Contract price is determined wholly on a unit basis, City may use unit prices bid in making progress estimates on the work. In case said unit prices do not, in the opinion of the City, truly represent actual relative costs of different parts of work, a percentage of the Unit Price may be used in making progress estimate adjustments.

e. If the City receives written notice of any unsettled claims for damage or other costs due to Contractor's operations including, without limitation, claims from any City Department or other governmental agency, an amount equal to the claim may be withheld from the progress payments, final payments or retainage until such claim has been resolved to the satisfaction of City.

f. Progress payments will be made by City on a monthly basis within thirty (30) days from sign off by the Contractor of the progress payment or fifteen (15) days after the payment is approved by City of work performed, whichever is the earlier date. Failure to pay progress payments within the timeframe set forth above will result in the imposition of interest as required by ORS 279C.570(2)(3). Defective or improper invoices will be addressed as set forth in ORS 279C.570(4)(5)(6).

g. Payment will be issued by City for the amount of the approved estimate, less five percent (5%) retainage. Except as provided in paragraph 19 above and the applicable ORS Sections noted herein, such amount of retainage shall be withheld and retained by City until it is included in and paid to Contractor as part of the final payment of the Contract amount. Upon

Substantial Completion of the work under the Contract which shall be understood to be not less than ninety-seven and one-half percent (97.5%) of the work, the City may, at its discretion, reduce the retained amount equivalent to not less than one hundred percent (100%) of the contract value or estimated value or estimated cost, whichever is greater, of the work remaining to be done. [279C.570(7)]

h. The City may decline to approve an application for payment and may withhold such approval if, in the City's opinion, and in good faith, the work has not progressed to the point indicated by the Contractor's submittal. The City may also decline to approve an application for payment or may reduce said payment or, because of subsequently discovered evidence or subsequent inspections, City may nullify the whole or any part of any payment previously made to such extent as may be necessary in their opinion to protect the City from loss because of: (1) defective work not remedied, (2) third party claims filed or failure of the Contractor to make payments properly to Subcontractors for labor, materials or equipment, unless Surety consents to such payment, (3) reasonable doubt that the work can be completed for the unpaid balance of the Contract sum, (4) damage to another contractor's work, (5) reasonable indication that the work will not be completed within the Contract time, (6) unsatisfactory prosecution of the work by the Contractor, (7) claims against the Contractor by the City, (8) failure to submit a construction schedule or failure to keep said construction schedule updated, or (9) exceeding work limits. When any or all of the criteria set forth above have been remedied satisfactorily to the City, payment shall be made for amounts withheld because of them. Withholding of progress payments or partial payments under the criteria set forth above shall not entitle the Contractor to interest on such withheld payments or partial payments, except as provided in ORS 279C.570(9).

i. If Contractor fails to complete the Project within the time limit fixed in the Contract or any extension, no further estimate may be accepted, or progress or other payments allowed until the Project is completed, unless approved otherwise by City. Progress estimates are for the sole purpose of determining progress payments and are not to be relied on for any other purpose. A progress payment is not considered acceptance or approval of any work or materials or waiver of any defects therein. [ORS 279.570(2)].

21. Final Estimate and Final Payment

a. SUBSTANTIAL COMPLETION. Contractor shall notify the City in writing when all or a portion of the work is considered substantially complete. If it appears to the City that the work is not substantially complete, the City shall not make an inspection. The City may make a general list of major work components remaining. If it appears that the work is substantially complete, the City shall, within fifteen (15) days after receiving notice, make an inspection and either accept the work or notify Contractor of work yet to be performed. If accepted, City shall prepare a Certificate of Substantial Completion, **Exhibit F.** Upon acceptance of the Certificate of Substantial Completion by both parties, the City shall be responsible for operation and maintenance of that part of the work described in the Certificate of Substantial Completion, subject to the warranty requirements and protection of the work and all other applicable terms of the contract documents. The date of substantial completion of all the work shall stop the accrual of liquidated damages, if applicable.

b. FINAL COMPLETION. Contractor shall notify the City in writing when work is 100% complete. If it appears to the City that the work is not 100% complete, the City shall not make a final inspection. The City may make a general list of major work components remaining. If it appears that the work is 100% complete, the City shall, within fifteen (15) days after receiving notice, make a final inspection and either accept the work or notify Contractor of

work yet to be performed on the Contract. A Certificate of Final Completion shall not be prepared until all provisions of the Contract have been met, including but not limited to, the submission by the Contractor of a signed Certificate of Compliance, **Exhibit G** and executed "Release of Liens and Claims" (**Exhibit H**).

When the work is 100% complete, the City shall prepare a final pay estimate and Certificate of Final Completion accepting the work as of a certain date. The Contractor shall execute and return the final pay estimate and Certificate of Final Completion within five (5) working days of receipt. Unless otherwise provided as a Special Provision, when City accepts the Certificate of Final Completion, the date the Contractor signs the Certificate of Final Completion shall be the date the City accepts Ownership of the work and the start date of the warranty period. The contractor may substitute a Warranty Bond in replacement of the Performance and Payment Bonds in accordance with Section 29. The City shall include in the final pay estimate an addition to the contract amount for any contract deduction from the contract amount for any liquidated damages and a deduction from the contract price in a fair and equitable amount for any damages to the City or for any costs incurred or likely to be incurred by the City due to Contractor's failure to meet any contract provision or specification other than timely completion.

If the Contractor believes the quantities and amounts specified in the final pay estimate prepared by the City to be incorrect, Contractor shall submit to the City within five (5) working days of receipt of the City's final pay estimate, an itemized statement of any and all claims for additional compensation under the Contract which are based on differences in measurements or errors of computation. Any such claim not so submitted and supported by an itemized statement within said period is expressly waived and the City shall not be obligated to pay the same.

The Contractor shall commence any suit or action to collect or enforce the claim or claims for any additional compensation arising from errors of computation in the final estimate within a period of one (1) year following the original mailing of the City's final estimate and Certificate of Final Completion to the Contractor's last known address as shown in the records of City. The City's issuance of a revised final estimate pursuant to this subsection does not alter the original final estimate date. If said suit, action or proceeding is not commenced in said one (1) year period, the final estimate and Certificate of Final Completion or revised final estimate and Certificate of Final Completion, if revisions are made, shall be conclusive with respect to the amount earned by the Contractor, and the Contractor expressly waives any and all claims for compensation and any and all causes of suit or action for the enforcement thereof that Contractor might have had.

Upon return of the fully executed Certificate of Final Completion from the Contractor, the City will submit the Certificate of Final Completion and final estimate to the City for approval. Upon approval and acceptance by the City, Contractor will be paid a total payment equal to the amount due under the Contract including retainage within thirty (30) days in accordance with ORS 279C.570. Failure to pay within 30 days shall implicate the interest on final payment/ retainage requirements of ORS 279C.570(8).

Monies earned by the Contractor are not due and payable until the procedures set forth in the contract documents for inspection, approval and acceptance of the work; for determination of the work done and the amount due therefore; for the preparation of the final estimate and Certificate of Final Completion and processing the same for payment; for consideration of the

Contractor's claim, or claims, if any; and for the preparing of a revised final estimate and Certificate of Final Completion and processing same for payment all have been carried out.

As a prerequisite to final payment, if Contractor is not domiciled in or registered to do business in the State of Oregon, the Contractor will provide City with evidence that the requirement of ORS 279A.120(3) has been satisfied.

If City declares a default of the Contract, and Surety completes said Contract, all payments made after declaration of default and all retainage held by City shall be paid to Surety and not to Contractor in accordance with the terms of the Contract.

Acceptance by Contractor of final payment shall release City from any and all claims by Contractor whether known or unknown, arising out of and relating to the work. No payment, however, final or otherwise, shall operate to release Contractor or its Sureties from warranties or other obligations required in the performance of the Contract.

Disputes as to compensation resolved in favor of the contractor implicate the interest provisions of ORS 279.570(9).

22. Change Orders / Extra Work

The Contractor agrees to complete this Contract in accordance with the attached specifications and requirements, including any change orders. A change order submitted by the City must be agreed upon by the Contractor and the City, and in the event of failure to so agree, the City may then proceed with any additional work in any manner the City may choose. A decision by the City to proceed to have work done by another party shall in no way relieve either the Contractor or City of this Contract and neither will such action be cause for collection of damages by either party to the contract, one from the other. Only the City designated Contracting Officer or individual with delegated contracting authority can authorize extra (and/or changed) work and compensation. Such authorization must be in writing. The parties expressly recognize that, except when such order is in writing by an individual with delegated authority, City personnel are not authorized to order extra (and/or) changed work or to waive contract requirements or authorize additional compensation. Failure of the Contractor to secure City authorization for extra work shall constitute a waiver of any and all claims or rights to adjustment in the contract price or contract time due to such unauthorized extra work and thereafter Contractor shall be entitled to no compensation whatsoever for the performance of such work. Contractor further expressly waives any and all right or remedy by way of restitution and *quantum meruit* for any and all extra work performed by Contractor without express and prior authorization of the City.

23. Contractor/Subcontractor Payment Obligations

a. The Contractor is required to include in each subcontract for property or services entered into by the Contractor and a first-tier subcontractor, including a material supplier, for the purpose of performing this contract:

   i. A payment clause that obligates the Contractor to pay the first-tier subcontractor for satisfactory performance under its subcontract within 10 days out of such amounts as are paid to the Contractor by the City under such contract; [279C.580(3)(a)] and

   ii. An interest penalty clause that obligates the Contractor, if payment is not made within 30 days after receipt of payment from the City, to pay to the first-tier

subcontractor an interest penalty on amounts due in the case of each payment not made in accordance with the payment clause included in the subcontract pursuant to paragraph (a)(i) above. A contractor or first-tier subcontractor shall not be obligated to pay an interest penalty if the only reason that the contractor or first-tier subcontractor did not make payment when payment was due is that the contractor or first-tier subcontractor did not receive payment from the City or contractor when payment was due. The interest penalty shall be:

A. For the period beginning on the day after the required payment date and ending on the date on which payment of the amount is due made; and

B. Computed at the rate specified in ORS 279C.515(2). [279C.580(3)(b)]

b. The Contractor is further required to include in each of its subcontracts, for the purpose of performance of such contract condition, a provision requiring the first-tier subcontractor to include a payment clause and an interest penalty clause conforming to the standards of section a. above in each of its subcontracts and to require each of its subcontractors to include such clauses in their subcontracts with each lower-tier subcontractor or supplier. [279C.580(4)]

c. The Contractor shall not request payment of any amount withheld or retained in accordance with ORS 279C.580(5) until such time as the Contractor has determined and certified to the City that the subcontractor is entitled to the payment of such amount. [279C.570(1)].

d. A dispute between the Contractor and a subcontractor relating to the amount or entitlement of a subcontractor to a payment or a late payment interest penalty under a clause included in the subcontract pursuant to subsections (3) and (4) of ORS 279C.580 does not constitute a dispute to which the City is a party. The City shall not be included as a party in any administrative or judicial proceeding involving such a dispute. [279C.580(2)]

e. The Contractor shall make payment promptly, as due, to all persons supplying to the Contractor labor or material for the performance of the work provided for in the contract. [ORS 279C.505(1)(a)] The Contractor shall pay all contributions or amounts due the Industrial Accident Fund and the State Unemployment Compensation Fund from the Contractor or Subcontractor incurred in the performance of the contract. [ORS 279C.505(1)(b)] The Contractor shall not permit any claim or lien to be filed or prosecuted against the City and shall be fully responsible for any lien or claim filed against the City on account of any labor or material furnished. [ORS 279C.505(1)(c)] The Contractor shall pay to the Department of Revenue all sums withheld from employees pursuant to ORS 316.167. [ORS 279C.505(1)(d)]

f. Pursuant to ORS 279C.515(1), if Contractor fails, neglects or refuses to make prompt payment of any claim for labor or services furnished to the Contractor or a subcontractor by any person in connection with the Contract as such claim becomes due, the proper officer(s) representing the City may pay the claim and charge the amount of the payment against funds due or to become due Contractor under this Contract.

g. Pursuant to ORS 279C.515(2), if the Contractor or a first-tier subcontractor fails, neglects or refuses to make payment to a person furnishing labor or materials in connection with the public improvement contract within 30 days after receipt of payment from the contracting agency or a contractor, the contractor or first-tier subcontractor shall owe the person the amount due plus interest charges commencing at the end of the 10-day period that payment is due under ORS 279C.580 (4) and ending upon final payment, unless payment is subject to a good faith dispute as defined in ORS 279C.580. The rate of interest charged to the contractor or first-tier subcontractor on the amount due shall equal three times the discount rate on 90-day commercial paper in effect at the Federal Reserve Bank in the Federal

Reserve district that includes Oregon on the date that is 30 days after the date when payment was received from the contracting agency or from the contractor, but the rate of interest may not exceed 30 percent. The amount of interest may not be waived.

h. Pursuant to ORS 279C.515(3), if the Contractor or a subcontractor fails, neglects or refuses to make payment to a person furnishing labor or materials in connection with the public improvement contract, the person may file a complaint with the Construction Contractors Board, unless payment is subject to a good faith dispute as defined in ORS 279C.580.

i. Pursuant to ORS 279C.515(4), the payment of a claim in the manner authorized in this section does not relieve the contractor or the contractor's surety from obligation with respect to any unpaid claims.

24. Inspection and Acceptance

Inspection and acceptance of all work required under this contract shall be performed by the City. The Contractor shall be advised of the acceptance or of any deficiencies in the deliverable items.

25. Liquidated Damages

City and Contractor recognize that time is of the essence of this Contract and that City will suffer substantial financial loss if the project work is not completed within the timeframe specified in Section (1) of the Public Improvement Contract. City and Contractor also recognize the delays, expense, and difficulties involved in proving in a legal or other dispute resolution preceding the actual loss suffered by City if the project work is not completed on time. Accordingly, instead of requiring any such proof, City and Contractor agree that as liquidated damages for delay (but not as a penalty) the Contractor shall pay the City a dollar amount per day based on calculations set forth in the Oregon Standard Specifications for Construction and the Special Provisions for this project, for each and every day that elapses in excess of the contract time or the final adjusted contract time. This amount is a genuine pre-estimation of the damages expected because of a delay in the completion of this project.

Any sums due as liquidated damages shall be deducted from any money due or which may become due to the Contractor under this Contract. Payment of liquidated damages shall not release the Contractor from obligations in respect to the fulfillment of the entire contract, nor shall the payment of such liquidated damages constitute a waiver of the City's right to collect any additional damages which may be sustained by failure of the Contractor to complete the work on time. Permitting the Contractor to continue and finish the project work or any part thereof after the contract time, or adjusted contract time, has expired shall in no way operate as a waiver on the part of the City or any of its rights under this contract. The City may in its discretion grant the Contractor an extension of time upon a showing made by the Contractor that the work has been unavoidably delayed by conditions beyond the control of the parties.

26. Liability, Indemnity and Hold Harmless

Contractor warrants that all its work will be performed in accordance with generally accepted practices and standards as well as the requirements of applicable federal, state, and local laws, it being understood that acceptance of Contractor's work by City shall not operate as a waiver or release. The Contractor shall hold harmless, indemnify, and defend City, its officers, agents, and employees from any and all liability, actions, claims, losses, damages or other costs of whatsoever nature, including attorney's fees and witness costs (at both trial and appeal level, whether or not a

trial or appeal ever takes place) that may be asserted by any person or entity arising from, during or in connection with the performance of the work, actions or failure to perform actions, and other activities of Contractor or its officers, employees, subcontractors or agents, under this contract, including the professional negligent acts, errors, or omissions of Contractor or its officers, employees, subcontractors, or agents except liability arising out of the sole gross negligence of the City and its employees. The Contractor shall assume all responsibility for the work and shall bear all losses and damages directly or indirectly resulting to the Contractor, to the City, and to their officers, agents, and employees on account of (a) the character or performance of the work, (b) unforeseen difficulties, (c) accidents, or (d) any other cause whatsoever. The Contractor shall assume this responsibility even if (a) fault is the basis of the claim, and (b) any act, omission or conduct of the City connected with the Contract is a condition or contributory cause of the claim, loss, damage or injury. Contractor waives any and all statutory or common law rights of defense and indemnification by the City. Such indemnification shall also cover claims brought against City under state or federal workers compensation laws. Contractor shall also defend and indemnify City from all loss or damage that may result from Contractor's wrongful or unauthorized use of any patented article or process. If any aspect of this indemnity shall be found to be illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of this indemnification. Any specific duty or liability imposed or assumed by the Contractor as may be otherwise set forth in the Contract documents shall not be construed as a limitation or restriction of the general liability or duty imposed upon the Contractor by this section. In the event any such action or claim is brought against the City, the Contractor shall, if the City so elects and upon tender by the City, defend the same at the Contractor's sole cost and expense, promptly satisfy any judgment adverse to the City or to the City and the Contractor jointly, and reimburse the City for any loss, cost, damage, or expense, including attorney fees, suffered or incurred by the City.

27. Insurance

The Contractor shall provide and maintain during the life of this Contract the insurance coverage as described in **Exhibit C.** All costs for such insurance shall be borne by the Contractor and shall be included in the contract price. In case of the breach of any provision of this section, the City may elect to take out and maintain at the expense of the Contractor such insurance as the City may deem proper. The City may deduct the cost of such insurance from any monies that may be due or become due the Contractor under this Contract. Failure to maintain insurance as provided is also cause for immediate termination of the Contract. Contractor shall furnish City certificates of insurance acceptable to City prior to execution by the City and before Contractor or any subcontractor commences work under this Contract. The certificate shall show the name of the insurance carrier, coverage, type, amount (or limits), policy numbers, effective and expiration dates and a description of operations covered. The certificate will include the deductible or retention level and required endorsements. Insuring companies or entities are subject to City's acceptance. If requested, copies of insurance policies shall be provided to the City. Contractor shall be responsible for all deductibles, self-insured retention's, and/or self-insurance. Approval of the insurance shall not relieve or decrease the liability of the Contractor hereunder.

28. Performance, Payment and Warranty Bonds / Notice of Bond Claims

At the time of execution of the Contract, the Contractor shall furnish: (1) Performance Bond and (2) Payment Bond written by a corporate surety or other financial assurance in an amount equal to the amount of the Contract based upon the estimate of quantities or lump sum as set forth in the Contract and in accordance with ORS 279.380. The bonds shall be continuous in effect and shall

remain in full force and effect until compliance with and fulfillment of all terms and provisions of the Contract, including the obligations of Sections 27 and 30, all applicable laws and the prompt payment of all persons supplying labor and/or material for prosecution of the work. The bond(s) or other financial assurance is subject to approval by the City.

Contractor shall furnish a separate warranty bond written by a corporate surety or other financial assurance, in an amount equal to 10% of the final amount of the contract. The City may permit the warranty amount to be included in the initial performance and payment bonds. The warranty bond or other financial assurance shall be in effect for a period of one year from the date of Final Completion. The City may require a separate warranty bond or financial assurance for any repairs done pursuant to the warranty obligation. Such separate warranty bond or financial assurance shall be for a period of one year from the date of completion of such repairs.

The notice of claim on a bond required by ORS 279C.600 must be sent by registered or certified mail or hand delivered no later than 120 days after the day the person last provided labor or furnished materials or 120 days after the worker listed in the notice of claim by the Commissioner of the Bureau of Labor and Industries last provided labor. The notice may be sent or delivered to the contractor at any place the contractor maintains an office or conducts business or at the residence of the contractor. Notwithstanding the above, if the claim is for a required contribution to a fund of any employee benefit plan, the notice required by ORS 279C.600 must be sent or delivered within 150 days after the employee last provided labor or materials.

The notice of claim must be in writing substantially as set forth in ORS 279C.605(3)-(5).

29. One-Year Warranty

In addition to and not in lieu of any other warranties required under the Contract, Contractor shall make all necessary repairs and replacements to remedy, in a manner satisfactory to the City and at no cost to the City, any and all defects, breaks, or failures of the work occurring within one year following the date of completion due to faulty or inadequate materials or workmanship. Repair damage or disturbances to other improvements under, within, or adjacent to the work, whether or not caused by settling, washing, or slipping, when such damage or disturbance is caused, in whole or in part, from activities of the Contractor in performing its duties and obligations under this Contract when such defects or damage occur within the warranty period. The one-year warranty period shall, with relation to such required repair, be extended one year from the date of completion of such repair.

If Contractor, after written notice, fails within ten days to proceed to comply with the terms of this section, City may have the defects corrected, and the Contractor and Contractor's surety shall be liable for all expense incurred. In case of an emergency where, in the opinion of the City, delay would cause serious loss or damage, repairs may be made without notice being given to Contractor and Contractor or Surety shall pay the cost of repairs. Failure of the City to act in case of an emergency shall not relieve Contractor or Surety from liability and payment of all such costs.

30. Nondiscrimination in Labor

No person shall be subject to discrimination in the receipt of the benefits of any services or activities made possible by or resulting from this Agreement on the grounds of sex, race, color, creed, marital status, age, sexual orientation or national origin. Contractor shall comply with

provisions of Owner's Equal Opportunity Policy and comply with ORS Chapter 659 and ORS Chapter 659A relating to unlawful employment practices and discrimination by employers against any employee or applicant for employment because of race, religion, color, sex, national origin, marital status or age if the individual is 18 years of age or older. Particular reference is made to ORS 659A.030, which states that it is unlawful employment practice for any employer, because of the race, religion, color, sex, national origin, marital status or age if the individual is 18 years or older or because of the race, religion, color, sex, national origin or age of any other person with whom the individual associates, or because of a juvenile record that has been expunged pursuant to ORS 419A.260 and ORS 419A.262 of any individual, or to refuse to hire or employ or to bar or discharge from employment such individual or to discriminate against such individual in compensation or in terms, conditions or privileges of employment. Any violation of this provision shall be considered a material violation of the Agreement and shall be grounds for cancellation, termination, or suspension in whole or in part (q).

31. Construction Debris and Yard Waste

Contractor shall salvage or recycle construction and demolition debris, if feasible and cost effective. If the contract includes lawn and landscaping maintenance, Contractor shall compost or mulch yard waste material at an approved site, if feasible and cost effective. [ORS 279C.510(1) & (2)]

32. Environmental Regulations

Pursuant to ORS 279C.525(1), the following is a list of federal, state and local agencies which have enacted ordinances or regulations dealing with the prevention of environmental pollution and the preservation of natural resources that may affect the performance of the contract.

Federal Agencies:

Agriculture, Department of
Forest Service
Soil Conservation Service
Commerce Department of
National Oceanic and Atmospheric Administration (NOAA)
National Marine Fisheries Service (NMFS)
Defense, Department of
Army Corps of Engineers
Energy, Department of
Federal Energy Regulatory Commission
Environmental Protection Agency
Health and Human Services Department of
Housing and Urban Development,
Solar Energy and Energy Conservation Bank
Interior, Department of
Bureau of Land Management
Bureau of Indian Affairs
Bureau of Mines
Bureau of Reclamation
Geological Survey
Minerals Management Service
U.S. Fish and Wildlife Service

Labor, Department of
Mine Safety and Health Administration
Occupational Safety and Health Administration
Transportation, Department of
Coast Guard
Federal Highway Administration
Water Resources Council

State Agencies:

Administrative Services, Department of
Agriculture, Department of
Consumer & Business Services, Department of
Oregon Occupational Safety & Health Division
Energy, Department of
Environmental Quality, Department of
Fish and Wildlife, Department of
Forestry, Department of
Geology and Mineral Industries, Department of
Human Resources, Department of
Land Conservation and Development Commission
Parks and Recreation, Department of
Soil and Water Conservation Commission
State Engineer
State Land Board (Lands, Division of State)
Water Resources Department

Local Agencies:

CITY of ASHLAND
City Council (Ashland Municipal Code)
County Courts
County Commissioners of Jackson County,
County Service Districts
Sanitary Districts
Water Districts
Fire Protection Districts
Historical Preservation Commissions
Planning Commission

If the Contractor awarded the project is delayed or must undertake additional work by reason of existing ordinances, rules or regulations of agencies not cited above or due to the enactment of new or the amendment of existing statutes, ordinances, rules or regulations relating to the prevention of environmental pollution and the preservation of natural resources occurring after the submission of the successful bid, the City may:

(a) Terminate the contract;
(b) Complete the work itself;
(c) Use non-City forces already under contract with the City;
(d) Require that the underlying property owner be responsible for cleanup;
(e) Solicit bids for a new contractor to provide the necessary services; or

(f) Issue the contractor a change order setting forth the additional work that must be undertaken.

The solicitation documents make specific reference to known conditions at the construction site that may require the successful bidder to comply with the ordinances, rules or regulations identified above. If Contractor encounters a condition not referred to in the solicitation documents, not caused by the successful bidder and not discoverable by a reasonable pre-bid visual site inspection, and the condition requires compliance with the ordinances, rules or regulations enacted by the governmental entities identified above, the successful bidder shall immediately give notice of the condition to the contracting agency. Except in the case of an emergency and except as may otherwise be required by any environmental or natural resource ordinance, rule or regulation, the Contractor shall not commence work nor incur any additional job site costs in regard to the condition encountered and described in subsection (3) of this section without written direction from the contracting agency. Upon request by the City, the Contractor shall estimate the emergency or regulatory compliance costs as well as the anticipated delay and costs resulting from the encountered condition. This cost estimate shall be promptly delivered to the contracting agency for resolution. Within a reasonable period of time following delivery of an estimate of this section, the City may:

(a) Terminate the contract;
(b) Complete the work itself;
(c) Use non-City forces already under contract with the City;
(d) Require that the underlying property owner be responsible for cleanup;
(e) Solicit bids for a new contractor to provide the necessary services; or
(f) Issue the contractor a change order setting forth the additional work that must be undertaken.

If the City chooses to terminate the contract under either subsection (a) of this section, the Contractor shall be entitled to all costs and expenses incurred to the date of termination, including overhead and reasonable profits, on the percentage of the work completed. The City shall have access to the contractor's bid documents when making the contracting agency's determination of the additional compensation due to the contractor. If the contracting agency causes work to be done by another contractor under either subsection (c) or (e) above, the initial contractor may not be held liable for actions or omissions of the other contractor. The change order under either subsection (f) of this section shall include the appropriate extension of contract time and compensate the contractor for all additional costs, including overhead and reasonable profits, reasonably incurred as a result of complying with the applicable statutes, ordinances, rules or regulations. The City shall have access to the contractor's bid documents when making the contracting agency's determination of the additional compensation due to the contractor.

Notwithstanding the above, the City has allocated all or a portion of the known environmental and natural resource risks to a Contractor by listing such environmental and natural resource risks in the solicitation documents.

33. Waiver

The failure of the City to enforce any provision of this contract shall not constitute a waiver by the City of that or any other provision. City shall not be precluded or estopped by any measurement,

estimate or certificate made either before or after completion and acceptance of work or payment therefore, from showing the true amount and character of work performed and materials furnished by the Contractor, or from showing that any such measurement, estimate or certificate is untrue or incorrectly made, or that work or materials do not conform in fact to the Contract. City shall not be precluded or estopped, notwithstanding any such measurement, estimate or certificate, or payment in accordance therewith, from recovering from the Contractor and their Sureties such damages as it may sustain by reason of their failure to comply with terms of the Contract, or from enforcing compliance with the Contract. Neither acceptance by City, or by any representative or agent of the City, of the whole or any part of the work, nor any extension of time, nor any possession taken by City, nor any payment for all or any part of the project, shall operate as a waiver of any portion of the Contract or of any power herein reserved, or any right to damages herein provided. A waiver of any breach of the Contract shall not be held to be a waiver of any other breach.

34. Errors

The Contractor shall perform such additional work as may be necessary to correct errors in the work required under this Contract without undue delays and without additional cost.

35. Severability

If any term or provision of this contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the contract did not contain the particular term or provision held invalid.

36. Attorney's Fees

If a suit or action is filed to enforce any of the terms of this contract, the prevailing party shall be entitled to recover from the other party, in addition to costs and disbursements provided by statute, any sum which a court, including any appellate court, may adjudge reasonable as attorney's fees.

37. Business License

The Contractor shall obtain a City of Ashland business license as required by City ordinance prior to beginning work under this Contract. The Contractor shall provide a business license number in the space provided in this contract.

38. Notices/Bills/Payments

All notices, bills, and payments shall be made in writing and may be given by personal delivery or by mail. Notices, bills, and payments sent by mail should be addressed as follows:

City of Ashland
Derek HuizingaBell
Public Works/Engineering Department
20 E. Main Street
Ashland, OR 97520

and when so addressed, shall be deemed given upon deposit in the United States Mail, postage prepaid. In all other instances, notices, bills, and payments shall be deemed given at the time of

actual delivery. Changes may be made in the names and addresses of the person to whom notices, bills, and payments are to be given by giving notice pursuant to this paragraph.

39. Conflict of Interest

Contractor covenants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of its services. The Contractor further covenants that in the performance of this contract no person having any such interest shall be employed.

40. Merger Clause

THIS CONTRACT AND ATTACHED EXHIBITS CONSTITUTE THE ENTIRE AGREEMENT BETWEEN THE PARTIES. NO WAIVER, CONSENT, MODIFICATION OR CHANGE OF TERMS OF THIS CONTRACT SHALL BIND EITHER PARTY UNLESS IN WRITING AND SIGNED BY BOTH PARTIES. SUCH WAIVER, CONSENT, MODIFICATION OR CHANGE, IF MADE, SHALL BE EFFECTIVE ONLY IN THE SPECIFIC INSTANCE AND FOR THE SPECIFIC PURPOSE GIVEN. THERE ARE NO UNDERSTANDINGS, AGREEMENTS, OR REPRESENTATIONS, ORAL OR WRITTEN, NOT SPECIFIED HEREIN REGARDING THIS CONTRACT. BY ITS SIGNATURE, CONTRACTOR ACKNOWLEDGES IT HAS READ AND UNDERSTANDS THIS CONTRACT, AND AGREES TO BE BOUND BY ITS TERMS AND CONDITIONS.

ATTACHMENTS: EXHIBITS B-J

EXHIBIT B	**COMPLIANCE WITH APPLICABLE PUBLIC CONTRACT LAW**
EXHIBIT C	**INSURANCE REQUIREMENTS**
EXHIBIT D	**INDEPENDENT CONTRACTOR CERTIFICATION**
EXHIBIT E	**BONDS (BID, PAYMENT AND PERFORMANCE)**
EXHIBIT F	**CERTIFICATE OF SUBSTANTIAL COMPLETION**
EXHIBIT G	**CERTIFICATE OF COMPLIANCE**
EXHIBIT H	**RELEASE OF LIENS AND CLAIMS**
EXHIBIT I	**CERTIFICATE OF FINAL COMPLETION**
EXHIBIT J	**INSTRUCTIONS TO BIDDERS**

EXHIBIT B
COMPLIANCE WITH APPLICABLE LAW
PUBLIC IMPROVEMENT CONTRACT

This exhibit contains the requirements for public contracting as set forth in ORS 279C.360 through and including ORS 279C.800 and is available through the city Engineering Office at 51 Winburn Way, Ashland, Oregon or online at www.leg.state.or.us/ors

EXHIBIT C
PUBLIC IMPROVEMENT CONTRACT INSURANCE REQUIREMENTS

To: Insurance Agent. Please provide Certificates of Insurance to the Project Manager. During the term of the contract, please provide Certificates of Insurance prior to each renewal. Insurance shall be without prejudice to coverage otherwise existing. During the term of this contract, Contractor shall maintain in force at its own expense all insurance noted below:

Workers Compensation insurance in compliance with ORS 656.017. All employers, including Contractor and any subcontractors, that employ subject workers who work under this Contract in the State of Oregon shall comply with ORS 656.017 and provide the required Workers' Compensation coverage, unless such employers are exempt under ORS 656.126. Contractor shall ensure that each of its subcontractors complies with these requirements.

Commercial General Liability insurance on an occurrence basis, with a combined single limit of not less than ☐ $1,000,000 or ☒ $2,000,000 for each occurrence of bodily injury, personal injury and property damage. It shall include coverage for broad form contractual liability; broad form property damage; personal and advertising injury; owners and contractor protective; premises/operations; and products/completed operations. Coverage shall not exclude excavation, collapse, underground, or explosion hazards. Aggregate limits shall apply on a per-project basis.

☒ Required by City ☐ Not required by City

Commercial Automobile Liability insurance with a combined single limit, or the equivalent of not less than ☐ $1,000,000 or ☒ $2,000,000 for each accident for Bodily Injury and Property Damage, including coverage for owned, hired and non-owned vehicles. "Symbol One" coverage shall be designated.

☒ Required by City ☐ Not required by City

☐ Builders Risk *(Check here if required)* insurance during construction to the extent of 100 percent of the value of the work for the benefit of the parties to the Contract as their interest may appear. Coverage shall also include: (1) formwork in place; (2) form lumber on site; (3) temporary structures; (4) equipment; and (5) supplies related to the work while at the site.

Notice of Cancellation or Change. There shall be no cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s) without 30 days written notice from the Contractor or its insurer(s) to the City. This notice provision shall be by endorsement physically attached to the certificate of insurance.

Additional Insured. For general liability insurance and automobile liability insurance the City, and its agents, officers, and employees will be Additional Insureds, but only with respect to Contractor's services to be provided under this contract. This coverage shall be by endorsement physically attached to the certificate of insurance.

The Contractor shall defend, indemnify, and hold harmless, the City and the City's officers, agents, and employees against any liability that may be imposed upon them by reason of the Contractor's or subcontractor's failure to provide workers' compensation and employers liability coverage.

Certificates of Insurance. Contractor shall furnish insurance certificates acceptable to City prior to commencing work. The certificate will include the deductible or retention level and required endorsements. Insuring companies or entities are subject to City approval. If requested, copies of insurance policies shall be provided to the City. Contractor shall be responsible for all deductibles, self-insured retention's, and/or self-insurance.

EXHIBIT D
CERTIFICATION STATEMENT FOR CORPORATION
OR INDEPENDENT CONTRACTOR

A. CONTRACTOR IS A CORPORATION

CORPORATION CERTIFICATION: I am authorized to act on behalf of the entity named below and certify under penalty of perjury that it is a corporation.

Entity	Signature	Date

B. CONTRACTOR IS INDEPENDENT.

Independent Contractor Standards. As used in various provisions of ORS Chapters including but not limited to 316, 656, 657, and 701, an individual or business entity that performs labor or services for remuneration shall be considered to perform the labor or services as an "independent contractor" if the standards of ORS 670.600 are met.

Contractor and Project Manager certifies that the Contractor meets the following standards:

1. Contractor is free from direction and control over the means and manner of providing the labor or services, subject only to the specifications of the desired results.
2. Contractor is responsible for obtaining all assumed business registrations or professional occupation licenses required by state law or local ordinances.
3. Contractor furnishes the tools or equipment necessary for the contracted labor or services.
4. Contractor has the authority to hire and fire employees to perform the labor or services.
5. Payment to the Contractor is made upon completion of the performance or is made on the basis of a periodic retainer.
6. Contractor is registered under ORS chapter 701, if the Contractor provides labor or services for which such registration is required.
7. Contractor has filed federal and state income tax returns in the name of the business or a business Schedule C as part of the personal income tax return, for the previous year, for labor or services performed as an independent contractor in the previous year.
8. Contractor represent to the public that the labor or services are to be provided by an independently established business as four or more of the following circumstances exist.

(Check four or more of the following:)

____ A. The labor or services are primarily carried out at a location that is separate from Contractors residence or is primarily carried out in a specific portion of Contractors residence, which is set aside as the location of the business.

____ B. Commercial advertising or business cards are purchased for the business, or Contractor has a trade association membership.

____ C. Telephone listing is used for the business that is separate from the personal residence listing.

____ D. Labor or services are performed only pursuant to written contracts.

____ E. Labor or services are performed for two or more different persons within a period of one year.

____ F. Contractor assumes financial responsibility for defective workmanship or for service not provided as evidenced by the ownership of performance bonds, warranties, errors and omission insurance or liability insurance relating to the labor or services to be provided.

If any action is taken by a person or enforcement agency relating to Contractor's independent contractor status in connection with this contract, Contractor shall defend, hold harmless and indemnify the CITY of ASHLAND, its elected and appointed officials, employees, volunteers and agents from any such action, claim, judgment, fine, penalty, or order to pay. Contractor shall pay any additional costs incurred by the City in defending such action or incurred as a result of such action. This indemnification is in addition to any indemnification otherwise in this agreement.

_____

__ Contractor Signature Date

_____

__ Project Manager Signature Date

EXHIBIT E
BONDS
CITY OF ASHLAND
STANDARD PUBLIC IMPROVEMENT CONTRACT

BID BOND

We, _____, a corporation or partnership duly organized under the laws of the State of _____, and authorized to transact business in the State of Oregon, as "**PRINCIPAL**," and,

We, _____, a corporation or partnership duly organized under the laws of the State of _____, and authorized to transact business in the State of Oregon, as **"SURETY,"**

hereby jointly and severally bind ourselves, our respective heirs, executors, administrators, successors and assigns firmly by these presents to pay unto the City of Ashland, Oregon, (**OBLIGEE**) the sum of ($_____)

_____
Dollars.

The condition of the obligation of this bond, is that the PRINCIPAL herein has in response to City's *Notice to Contractors and Invitation to Bid*, submitted its Offer for the *Wastewater Collections and Storm Drainage-CIPP No. 2024-28* , which Offer is incorporated herein and made a part hereof by this reference, and Principal is required to furnish bid security in an amount equal to ten (10%) percent of the total amount of the bid pursuant to ORS 279C.365 and the City's public contracting rules and contract documents.

NOW THEREFORE, if the Offer, submitted by PRINCIPAL, is accepted, and if the Contract pursuant to the Offer is awarded to the PRINCIPAL, and if the PRINCIPAL executes such contract and furnishes such good and sufficient Performance and Payment Bonds as required by the Bidding and Contract documents within the time specified and fixed by the Documents, then this obligation shall be void; otherwise it shall remain in full force and effect. If the PRINCIPAL shall fail to execute the proposed Contract and to furnish the Performance and Payment Bonds, the SURETY hereby agrees to pay the OBLIGEE the surety bond sum as liquidated damages within ten (10) days of such failure.

IN WITNESS WHEREOF, we have caused this instrument to be executed and sealed by our duly authorized legal representatives this _____ day of _____ , 20___.

_____ _____
Surety Principal

_____ _____
Address

By:_____ By: _____

Attorney -in-Fact
[A certified copy of the Agent's Power of Attorney must be attached hereto.]

IMPORTANT – Surety companies executing BONDS must appear on the Treasury Department's most current list (Circular 570 as amended) and be authorized to transact business in the State of Oregon.

PERFORMANCE BOND

The undersigned _____, as principal, further referred to in this bond as Contractor, and _____, as surety, further referred to in this bond as Surety, are jointly and severally bound unto City of Ashland, as obligee, further referred to in this bond as City, in the sum of _____
Dollars ($_____).

Contractor and City have entered into a written contract dated _____, for the following project: ***Wastewater Collections and Storm Drainage-CIPP No. 2024-28.*** This contract is further referred to in this bond as the Contract and is incorporated into this bond by this reference.

The conditions of this bond are:

1. If Contractor faithfully performs the Contract in accordance with the plans, specifications and conditions of the contract within the time prescribed by the Contract, as required by ORS 279C. 380 through 279C.385, then this obligation is null and void; otherwise it shall remain in full force and effect.

2. If Contractor is declared by City to be in default under the Contract, the Surety shall promptly remedy the default, perform all of Contractor's obligations under the contract in accordance with its terms and conditions and pay to City all damages that are due under the Contract.

3. This bond is subject to claims under ORS 279C.380 through 279C.390.

4. This obligation jointly and severally binds Contractor and Surety and their respective heirs, executors, administrators, successors.

5. Surety waives notice of modification of the Contract or extension of the Contract time.

6. Nonpayment of the bond premium shall not invalidate this bond.

7. The bond number and the name, address, and telephone number of the agent authorized to receive notices concerning this bond are as follows.

Bond Number: _____

Bond Agent: _____

Address: _____

_____

Telephone: _____

SIGNED this _____ day of _____ 20___.

WITNESS:

(Corporate Seal)

CONTRACTOR: _____

By: _____

Title: _____

Legal Address: _____

_____

Attest: _____
Corporate Secretary

WITNESS:

(Corporate Seal)

SURETY: _____

By: _____

Title: _____

Legal Address: _____

_____

Attest: _____
Corporate Secretary

PAYMENT BOND

The undersigned _____, as principal, further referred to in this bond as Contractor, and _____, as surety, further referred to in this bond as Surety, are jointly and severally bound unto City of Ashland, as obligee, further referred to in this bond as City, in the sum of _____
Dollars ($_____).

Contractor and City have entered into a written contract dated _____, for the following project: **Wastewater *Collections and Storm Drainage-CIPP No. 2024-28***. This contract is further referred to in this bond as the Contract and is incorporated into this bond by this reference.

The conditions of this bond are:

1. If Contractor faithfully performs the Contract within the time prescribed by the Contract, and promptly makes payment to all claimants, as defined in ORS 279C.600 through 279C.620, then this obligation is null and void; otherwise it shall remain in full force and effect.

2. If Contractor is declared by City to be in default under the Contract, the Surety shall promptly remedy the default, perform all of Contractor's obligations under the contract in accordance with its terms and conditions and pay to City all damages that are due under the Contract.

3. This bond is subject to claims under ORS 279C.600 through 279C.620.

4. This obligation jointly and severally binds Contractor and Surety and their respective heirs, executors, administrators, successors.

5. Surety waives notice of modification of the Contract or extension of the Contract time.

6. Nonpayment of the bond premium shall not invalidate this bond.

7. The bond number and the name, address, and telephone number of the agent authorized to receive notices concerning this bond are as follows:

Bond Number: _____

Bond Agent: _____

Address: _____

_____

Telephone: _____

SIGNED this _____ day of _____ 20___.

WITNESS:

(Corporate Seal)

CONTRACTOR: _____

By: _____

Title: _____

Legal Address: _____

_____

Attest: _____
Corporate Secretary

WITNESS:

(Corporate Seal)

SURETY: _____

By: _____

Title: _____

Legal Address: _____

_____

Attest: _____
Corporate Secretary

EXHIBIT F

CERTIFICATE OF SUBSTANTIAL COMPLETION

CITY'S Project No. _____ Project No. N/A

Project: _____

CONTRACTOR _____

Contract For _____ Contract Date _____

This Certificate of Substantial Completion applies to:

- ☑ All Work under the Contract Documents, or
- ☐ To the following specified parts thereof:

The Work to which this Certificate applies has been inspected by authorized representatives of CITY, CONTRACTOR and CITY, and that Work is hereby declared to be substantially complete in accordance with the Contract Documents on

_____
DATE OF SUBSTANTIAL COMPLETION

A tentative list of items to be completed or corrected is attached hereto. This list may not be all inclusive,
and the failure to include an item in it does not alter the responsibility of CONTRACTOR to complete all
the Work in accordance with the Contract Documents. The items in the tentative list shall be completed or
corrected by CONTRACTOR within _____ Days of the above date of Substantial Completion.

The following documents are attached to and made a part of this Certificate:

_____

_____

Effective as of the last date set forth below, the responsibilities between CITY and CONTRACTOR shall be as follows:

Security	☐ City	☐ Contractor
Operation	☐ City	☐ Contractor
Safety	☐ City	☐ Contractor
Maintenance	☐ City	☐ Contractor
Heat	☐ City	☐ Contractor
Utilities	☐ City	☐ Contractor
Insurance	☐ City	☐ Contractor
Warranties	☐ City	☐ Contractor

Other Responsibilities:

City		Contractor

This Certificate does not constitute an acceptance of Work not in accordance with the Contract Documents, nor is it a release of CONTRACTOR'S obligation to complete the Work in accordance with the Contract Documents.

CONTRACTOR accepts this Certificate of Substantial Completion on: _____ , _____ .

By: _____

CITY accepts this Certificate of Substantial Completion on: _____ , _____ .

By: _____
CITY of ASHLAND

File:

EXHIBIT G

CERTIFICATE OF COMPLIANCE

_____

CIP Number: _____

Contractor: _____

_____

_____

I, (We) hereby certify that all work has been performed and materials supplied in accordance with the plans, specifications and contract documents for the above work, and that:

1. If required by law, not less than the prevailing rates of wages have been paid to laborers, workmen and mechanics employed on this work.

2. There have been no unauthorized substitutions of materials; substitutions or assignment of subcontractors; nor have any subcontracts been entered into without the names of the subcontractors having been submitted to the City prior to the start of such subcontracted work.

3. All claims and indebtedness for material and labor and other service performed in connection with these specifications have been paid.

4. All moneys due the State Industrial Accident Fund, the State Unemployment Compensation Trust Fund, the State Department of Revenue (ORS 316.162 to 316.212) hospital associations and/or others (ORS 279C.530) have been paid.

5. All private property and easement areas have been satisfactorily restored in accordance with the contract.

6. If Contractor is not domiciled in or registered to business in the State of Oregon, Contractor has reported to the Oregon Department of Revenue such information and in the manner as required by ORS 279A.120(3).

Contractor: _____

By: _____ **Date:** _____

Title: _____

EXHIBIT H

CONTRACTOR'S RELEASE OF LIENS AND CLAIMS

[THIS SWORN STATEMENT IS A PREREQUISITE TO CERTIFICATE OF FINAL COMPLETION]

TO: City of Ashland
20 East Main Street
Ashland, Oregon 97520

FROM: _____
_____
_____

PROJECT: _____

In connection with our request for final payment for the above project, I, _____, hereby state that:

all subcontractors and suppliers on this project have been paid in full,
all obligations on the project have been satisfied,
all monetary claims and indebtedness on this project have been paid, and
all disputes with property owners have been resolved.

There are no liens or claims of any kind outstanding or threatened against the project.

Furthermore, I agree to indemnify and hold harmless CITY of ASHLAND from any and all claims for labor or materials furnished under the contract for the above project.

SWORN STATEMENT
I hereby certify, under penalty of perjury and false swearing, that the foregoing statements are true and correct.

Dated this _____ day of _____, 20___.

Contractor:
By: _____
Title:

STATE OF OREGON)
) ss.
County of _____)

On this _____ day of _____, 20___, before me personally appeared _____, _____whom I know personally
_____whose identity I proved on the basis of ___
_____whose identity I proved on the oath/affirmation of _____, a credible witness to be the signer of the above document, and he/she acknowledged that he/she executed the same under oath/affirmation.

_____
Notary Public for Oregon

EXHIBIT I
CERTIFICATE OF FINAL COMPLETION

Project Number: _____

Project: _____

_____

Contractor: _____

Contract Signed: _____ Contract Expires: _____

Contract Completed: _____ Delinquent: _____

I hereby certify that I have completed my contract, furnished the materials, and performed the work as shown by the final estimate of the City, according to the plans and specifications.

_____ _____ _____
Contractor *Title* *Date*

The City has determined the project is 100% complete in compliance with all contract documents.

_____ _____
Inspector Supervisor *Date*

_____ _____
Project Manager *Date*

_____
CITY of ASHLAND *Title* *Date*

Unless otherwise provided as a Special Provision, when City accepts the Certificate of Final Completion, the date the Contractor signs the Certificate of Final Completion shall be the date the City accepts ownership of the work and the start date of the warranty period.

EXHIBIT J

****

INSTRUCTIONS TO BIDDERS

****

The provisions of Oregon Administrative Rules Chapter 137, Divisions 46 and 49, apply to all bids and contracts concerning Public Improvements and Public Works in the City of Ashland. The OAR provisions control over any conflicting language in the City Standard Terms and Conditions, Special Provisions, including Technical Provisions and the OAR provisions are incorporated herein by this reference.

1. SCOPE OF WORK

The work contemplated under this contract includes all permits, labor, tools, machinery, materials, transportation, equipment and services of all kinds required for, necessary for, or reasonable incidental to, the completion of all the work in connection with the project described in the contract documents, including the general conditions, all applicable special conditions, plans, specifications, or any supplemental documents.

2. EEO AFFIRMATIVE ACTION

Bidders must comply with the City of Ashland Equal Opportunity Policy for Contractors. The policy is included in and made a part of these Contract Documents and is attached hereto and made a part hereof as Attachment A. Contractor shall not discriminate against minorities, women or emerging small business enterprises in the awarding of subcontracts.

3. BID PROVISIONS

a. Each bid must contain a completed Bid including the following:

A. A Bid and Schedule of Prices.
B. Acknowledgement that the bidder has received and reviewed all Addenda for the bid.
C. A statement that all applicable provisions of ORS Chapters 279A-C, including ORS 279C.800 to 279C.870 (Contracting and Prevailing Wages) shall be complied with.
D. A statement by the bidder, as part of their bid, that the bidder agrees to be bound by and will comply with the provisions of ORS 279C.838, 279C.840 or 40 U.S.C. 3141 to 3148.
E. A statement as to whether the bidder is a resident bidder as defined in ORS 279A.120.
F. A statement as to whether or not the bidder is licensed under ORS 468A.720 for asbestos removal.
G. A statement that the bidder has a current and valid registration with the Construction Contractor's Board and/or the State Landscape Contractors Board as required by ORS 671.530.
H. A statement confirming that the bidder has a Qualified Drug-testing Program for employees in place. [OAR 137-049-0200(1)(c)(B)].

I. First Tier Subcontractor form for the project on the City form (physically received in accordance with ORS 279C.370 within 2 working hours of the bid opening).
J. A Surety Bond, Cashier's check or Certified check in the amount of 10 percent of the submitted bid.
K. Certification: Non-discrimination (in bid)
L. Certification: No Conflict of Interest (in bid)
M. Certification: Not ineligible for Public Works Contracts [OAR 137-049-0230] (in bid)

b. The City will mail addenda and will publish notice of any addenda on City's website at: **www.ashland.or.us** The addenda may be downloaded or picked up at the City Engineering Office located at 51 Winburn Way, Ashland Oregon, 97520. Check the website frequently until closing. Addenda to the Contract Documents shall be mailed to potential Bidders that have obtained a copy of the Contract Documents.

c. No bid will be received or considered by the City of Ashland unless the bid contains a statement by the bidder as a part of its bid that the Contractor shall be bound by and will comply with the provisions of ORS 279C.838, 279C.840 or 40 U.S.C. 3141 to 3148. The statement shall be included in the Bid form. The existing prevailing rate of wage is available at:

https://www.oregon.gov/boli/WHD/PWR/Pages/pwr_state.aspx

d. Each Bidder must identify in the Bid whether the Bidder is a "resident bidder" as defined in ORS 279A.120.

e. Unless specified in the ITB, and Contract Special Provisions, the bidder or subcontractor need not be licensed under ORS 468A.720 relating to asbestos abatement.

f. No bid for a construction contract shall be received or considered by the City of Ashland unless the bidder is licensed with the Construction Contractors Board or licensed by the State Landscape Contractors Board as required by ORS 671.530.

g. Each Bidder must demonstrate that its firm has a Qualified Drug Testing Program for employees in place and demonstrate compliance prior to award.

h. Instructions for First-Tier Subcontractors Disclosure. Bidders are required to disclose information about certain first-tier subcontractors when the contract value for a Public Improvement is greater than $100,000 (see ORS 279C.370; OAR 137-049-0360).

Specifically, when the contact amount of a first-tier subcontractor furnishing labor or labor and materials would be greater than or equal to (i) 5% of the project bid, but at least $15,000, or (ii) $350,000 regardless of the percentage, the bidder must disclose the following information about that subcontract in its bid submission or within two (2) working hours after bid closing:

(1) The subcontractor's name,
(2) The dollar value of the subcontract, and
(3) The category of work that the subcontractor would be performing.

If the bidder will not be using any subcontractors that are subject to the above disclosure requirements, the bidder is required to indicate "NONE" on the accompanying form. Disclosure forms will be available for public inspection after the opening of the bids.

THE CITY OF ASHLAND MUST REJECT A BID AS NON-RESPONSIVE IF THE BIDDER FAILS TO SUBMIT THE DISCLOSURE FORM WITH THE REQUIRED INFORMATION BY THE STATED DEADLINE (see OAR 137-049-0360).

i. Bid Security. [OAR 137-049-0290]

No bid will be received or considered unless the Bid is accompanied by a certified check, cashier's check, (payable to the City of Ashland), surety bond (in approved form)(f/k/a/ bid bond), or irrevocable letter of credit issued by an insured institution [ORS 706.008] (in an approved form) in an amount equal to ten percent (10%) of the total amount bid. The successful bidder will be required to furnish a faithful performance bond and a labor and material payment bond each in the amount of one hundred percent (100%) of the amount of the contract. Said security shall be irrevocable for 60 days, unless specified otherwise. The bid security shall be forfeited, at the City's option, as fixed and liquidated damages, if the bidder fails or neglects to furnish the required performance bond, the insurance, or to execute the contract within 10 working days after receiving the contract from the City for execution. When a bond is used for bid security, the bond shall be executed by a surety company authorized to transact business in the State of Oregon. THE BIDDER SHALL HAVE THE SURETY USE THE BID BOND FORM PROVIDED HEREIN. IF THIS FORM IS NOT USED, THE BID WILL BE DEEMED NON-RESPONSIVE AND SHALL BE REJECTED.

All such certified checks or surety bonds will be returned to the respective bidders within 10 working days after the bids are opened, except those of the two low bidders. The bid security of the two low bidders will be held by the City until the selected bidder has accomplished the following:

A. Executed a formal contract;
B. Executed and delivered to the City a Performance Bond and Payment Bond, both in the amount equal to 100% of the Contract Price;
C. Furnish proof of public works bond filed with BOLI; and
D. Furnish the required Certificates of Insurance.

Upon the execution and delivery to the City of Ashland of the Contract and Performance Bond and Payment Bond and furnishing proof of a Public Works Bond filed with BOLI by the successful bidder, the bid security shall be returned to the bidder. The bidder who has been awarded a contract and who fails or neglects to promptly and properly execute the contract or bonds shall forfeit the bid security that accompanied the bid. It is hereby specifically provided that a forfeiture of said bid security be declared by the Council if the contract and performance bond and payment bond are not executed and delivered to the City within ten (10) working days of the day of the receipt by the successful bidder of the prepared contract. The Council, at its option, may determine that the bidder has abandoned the submitted accepted bid, in which case the bid security shall become the sole property of the City and shall be considered as liquidated damages and not as a penalty for failure of the bidder to execute the contract and bond. The security of unsuccessful bidders shall be returned to them after the contract has been awarded and duly signed.

j. A Bidder submitting a bid thereby certifies that no officer, agent, or employee of the City who has a pecuniary interest in this bid has participated in the contract negotiations on the part of the City, that the Bid is made in good faith without fraud, collusion, or connection of any kind with any other Bidder for the same call for bids, and that the Bidder is competing solely on its own behalf without connection with, or obligation to, any undisclosed person or firm.

k. The Bidder, in submitting the bid, certifies that the Bidder has not been disqualified and is eligible to receive a contract for a public work pursuant to ORS 279C.860 as well as the disqualification provisions of ORS 279C.440 and OAR 137-049-0370. Bidder agrees, if awarded a contract, that every subcontractor will not be ineligible to receive a contract for a public work pursuant to ORS 279C.860 and will otherwise not be disqualified under ORS 279C.440 and OAR 137-049-0370.

4. PRE-BID CONFERENCE AND PREQUALIFICATION OF BIDDERS

If a pre-bid conference is scheduled, notice will be provided in accordance with OAR 137-049-0200(1)(a)(B). If prequalification will be required it will be specifically stated in the Notice to Contractors and Invitation to Bid, including the date prequalification applications must be filed under ORS 279C.430 and the class or classes of work for which bidders must be pre-qualified. [OAR 137-049-0200(1)(a)(C).] [ORS 279C.365(1)(c)] For example, the requirement for ODOT Prequalification reads as follows:

Bidders must be pre-qualified with the Oregon Department of Transportation or General Service per ORS 279C.435 to perform the type and size of work contemplated herein and shall submit, to the City upon request. The City will investigate and determine the qualifications for the apparent low bidder prior to awarding the contract. [OAR 137-049-0220].

Applications submitted without being designated for a project advertised for bid by the City will be considered as a general prequalification application and processed pursuant to ORS 279C.430 to 279C.450 and notice of prequalification status will be given within thirty (30) days of the receipt of the application. A notice of disqualification can be given orally. An oral disqualification notice will be followed by written notice and bear the date of the oral notice. (NOTE: No person may engage in any business within the City without first obtaining a City Business License and paying the fee prescribed pursuant to City of Ashland Ordinance and accompanying Fee Resolution)

5. FORM OF BID

A. Bids shall be submitted in sealed envelopes to:

Street Address:	**Mailing Address:**
Derek HuizingaBell	Derek HuizingaBell
Project Manager	Project Manager
City of Ashland	City of Ashland
51 Winburn Way	20 E. Main Street
Ashland, Oregon 97520	Ashland, Oregon 97520

The outside of the transmittal envelope shall bear the following information:

Name of Bidder

Address and telephone number of Bidder
Title of Project
Date of opening
The words "Sealed Bid"

If the sealed bid is forwarded by mail or messenger service, the sealed envelope containing the bid, and marked as above, must be enclosed in another envelope addressed as noted above**.** Facsimile and Electronic Data Interchange bids shall not be accepted unless otherwise specified in the Special Provisions. No bid will be received or considered by the City unless the bid contains all the Required Bid Documents and Certifications.

B. All bids must be clearly and distinctly typed or written with ink or indelible pencil and be on the Bid form furnished by Owner. The bid must be signed by the Contractor or a duly authorized agent. If erasures or other changes appear on the form, they shall be initialed in ink by the person who signs the bid. The bidder shall not alter, modify or change the Bid forms except as directed by addendum. All applicable blanks giving general information must be completed, in addition to necessary unit price items and total prices in the column of totals to make a complete bid. The Bid is the bidder's offer to enter into a contract which, if the Bid is accepted for award, binds the bidder to a contract and the terms and conditions contained in the Bid, as well as the Solicitation Documents. A bidder shall not make the Bid contingent upon the City's acceptance of specifications or contract terms which conflict with or are in addition to those advertised in the Notice to Contractors and Invitation to Bid. Any statement accompanying and tending to qualify a bid may cause rejection of such bid, unless such statement is required in a bid embracing alternative bids

C. Unless otherwise specified, Bidders shall bid on all bid items included in the bid and the low Bidder shall be determined. Except as provided herein, bids which are incomplete, or fail to reply to all items required in the bid may be rejected.

D. Bidders shall state whether business is being done as an individual, a co-partnership, a corporation, or a combination thereof, and if incorporated, in what state, and if a co-partnership, state names of all partners. The person signing on behalf of a corporation, a co-partnership or combination thereof shall state their position with the firm or corporation, and state whether the corporation is licensed to do business in the State of Oregon.

6. LATE BIDS

Bids received after the scheduled closing time for submission of bids as set forth in the invitation for bids will be rejected. Bids will be time and date stamped by Community Development Department / Public Works Counter personnel upon receipt. Such time and date stamps will govern the determination of on-time submission of bids. Bids received after the time so fixed are late bids. Late bids will be time and date stamped at the time of receipt by City personnel, marked as "Rejected as Late Bid" and will be returned, unopened, to the submitted.

7. INTERPRETATION OF CONTRACT AND ADDENDA

If a bidder finds error, discrepancies in, or omissions from the plans, specifications or contract documents, or has doubt as to their interpretation or meaning, the bidder shall at once notify the City Contact Person/ Project Manager. The City will investigate and determine if an addendum will be issued.

If it should appear to a Bidder that the work to be done or matters relative thereto are not sufficiently described or explained in the Contract Documents or that Contract Documents are not definite and clear, or the Bidder needs additional information or an interpretation of the contract, the Bidder may make written inquiry regarding same to the Project Manager at least ten (10) days, unless otherwise specified, before the scheduled closing time for submission of bids.

If, in the opinion of the Project Manager, additional information or interpretation is required, an addendum will be issued to all known specification holders.

Any addendum or addenda issued by the City which may include changes, corrections, additions, interpretations or information, and issued seventy-two (72) hours or more before the scheduled closing time for submission of bids, Saturday, Sunday and legal holidays not included, shall be binding upon the Bidder. City shall supply copies of such Addenda will not be mailed but will be posted on the website and available at Community Development Department Counter; failure of the Contractor to receive or obtain such addenda shall not excuse them from compliance therewith if they are awarded the contract.

ORAL INSTRUCTIONS OR INFORMATION CONCERNING THE CONTRACT, OR THE PROJECT GIVEN OUT BY OFFICERS, EMPLOYEES OR AGENTS OF THE CITY TO PROSPECTIVE BIDDERS SHALL NOT BIND THE CITY.

8. EXAMINATION OF CONTRACT, SITE OF WORK AND SUBSURFACE DATA

A. Prior to submitting a bid, it is the responsibility of each Bidder to:

(1) Examine the plans, specifications and contract documents thoroughly.
(2) Become fully informed as to the quality and quantity of materials and the character of the work required.
(3) Visit the site to become familiar with local conditions that may affect cost, progress, or performance of the work and sources and supply of materials.
(4) Consider all federal, state and local laws, ordinances, rules and regulations that may affect cost, progress, or performance of the work, including environmental and natural resource ordinance and regulations
(5) Consider identified site conditions and conduct pre-bid inspection to address environmental and natural resource laws implicated by the project.
(6) Study and correlate the Bidder's observations, especially as regards site conditions with the Contract Documents.
(7) Notify the Contact Person of all conflicts, errors, ambiguities or discrepancies discovered in the Contract Documents.

B. Bidders shall determine for themselves all the conditions and circumstances affecting the project or the cost of the proposed work, including without limitation utility interferences, by personal examination of the site, careful review of the Contract and by such other means as the Bidder feels may be necessary. It is understood and agreed that information

regarding subsurface or other conditions, or obstructions indicated in the Contract Documents, is provided by Owner only for the convenience of Bidders and may not be complete or accurate and such information is not expressly or tacitly warranted to accurately represent actual conditions. Bidder's use of such information shall be at Bidder's sole risk, and Bidder is responsible to confirm any information provided from such independent sources as Bidder feels may be necessary.

C. Logs of test holes, test pits, soils reports, ground-water levels and other supplementary subsurface information are offered as information of underlying materials and conditions at the locations actually tested. Owner will not be liable for any loss sustained by the Bidder as a result of any variance between conditions contained in or interpretations of test reports and the actual conditions encountered during progress of the work.

D. The submission of a Bid shall be conclusive evidence that the Bidder has investigated and is satisfied as to the site subsurface conditions to be encountered, as to the character, quality and quantities of work to be performed and materials to be furnished, and as to the requirements of the Contract.

E. The City will not pay any costs incurred by any Bidder in the submission of a Bid, or in making necessary studies or designs for the preparation thereof, or for procuring or contracting for the items to be furnished under the Invitation to Bid. When submitting a bid, the Bidder agrees that consideration has been given to the requirements and conditions contained throughout these Bid Documents.

F. Notice: It is further understood that a Bid awarded hereunder is subject to the City being able to comply with all zoning and land development ordinances or obtain rezoning of the property where necessary, and comply with local building code restrictions and conditions for structures contemplated in the project, any or all of which conditions may be contained in the Contract or Contract Special Provisions and if such conditions are not satisfied may result in termination of the Contract.

9. FAMILIARITY WITH LAWS AND ORDINANCES

A. The Bidder is presumed to be familiar with all Federal, State, and Local laws, ordinances, and regulations which in any manner affect those engaged or employed in the work or the materials or equipment used in the proposed construction, or which in any way affect the conduct of the work. If the Bidder, or Contractor, shall discover any provision in the Contract which is contrary to or inconsistent with any law, ordinance or regulation, it shall immediately be reported to the Owner in writing.

B. No person may engage in any business within the City without first obtaining a City Business License and paying the fee prescribed pursuant to City of Ashland Ordinance. The Contractor and their subcontractors shall obtain a City of Ashland Business License prior to beginning any work within the City of Ashland.

10. UNIT BIDS

A. The estimate of quantities of work to be done under unit price bids is approximate and is given only as a basis of calculation for comparison of bids and award of the Contract. The City does not warrant that the actual amount of work will correspond to the amount as

shown or estimated. Payment will be made at unit prices under a contract, only for work actually performed or materials actually furnished according to actual measurements that were necessary to complete the work.

B. Bidders must include in their bid prices the entire cost of each item of work set forth in the Bid, and when, in the opinion of the City, the prices in any bid are obviously unbalanced, such bid may be rejected.

C. The unit contract prices for the various bid items of the contract shall be full compensation for all labor, materials, supplies, equipment, tools and all things of whatsoever nature are required for the complete incorporation of the item into the work the same as though the item were to read "In Place."

11. WITHDRAWAL, MODIFICATION OR ALTERATION OF BID

A. Bids may be withdrawn on written request received from the bidders prior to the time fixed for opening. The request shall be executed by the bidder or a duly authorized representative. The withdrawal of a bid does not prejudice the right of the bidder to file a new Bid. Negligence on the part of the Bidder in preparing the Bid confers no right for the withdrawal of the bid after it has been opened. The Bid will be irrevocable until such time as the City:

- Specifically rejects the Bid, and
- Awards the contract to another bidder and said contract is properly executed.

All bids shall remain subject to acceptance by the City for sixty (60) days after the date of the bid opening.

B. Prior to Bid Opening, changes may be made provided the change is initialed by the Bidder or the Bidder's agent. If the intent of the Bidder is not clearly identifiable, the interpretation most advantageous to Owner will prevail.

C. No Bidder may withdraw a bid after bid opening unless sixty (60) days have elapsed and the City has not awarded a contract.

12. MISTAKES IN BIDS

A. To protect the integrity of the competitive solicitation process and to assure fair treatment of Bidders, City will carefully consider whether to permit waiver, correction or withdrawal for certain mistakes.

B. Treatment of Mistakes. City shall not allow a Bidder to correct or withdraw a Bid for an error in judgment. If the City discovers certain mistakes in a Bid after Opening, but before Award of the Contract, the City may take the following action:

(a) City may waive, or permit a Bidder to correct, a minor informality. A minor informality is a matter of form rather than substance that is evident on the face of the Bid, or an insignificant mistake that can be waived or corrected without prejudice to other Bidders. Examples of minor informalities include a Bidder's failure to:

(i) Return the correct number of Signed Bids or the correct number of other documents required by the Solicitation Document;

(ii) Sign the Bid in the designated block, provided a Signature appears elsewhere in the Bid, evidencing an intent to be bound; and

(iii) Acknowledge receipt of an Addendum to the Solicitation Document, provided: it is clear on the face of the Bid that the Bidder received the Addendum and intended to be bound by its terms; and the Addendum involved did not affect price, quantity or delivery.

(b) City may correct a clerical error if the error is evident on the face of the Bid, or other documents submitted with the Bid, and the Bidder confirms the City's correction in writing. A clerical error is a Bidder's error in transcribing its Bid. Examples include typographical mistakes, errors in extending unit prices, transposition errors, arithmetical errors, instances in which the intended correct unit or amount is evident by simple arithmetic calculations (for example a missing unit price may be established by dividing the total price for the units by the quantity of units for that item or a missing, or incorrect total price for an item may be established by multiplying the unit price by the quantity when those figures are available in the Bid). In the event of a discrepancy, unit prices shall prevail over extended prices.

(c) City may permit a Bidder to withdraw a Bid based on one or more clerical errors in the Bid only if the Bidder shows with objective proof and by clear and convincing evidence:

(i) The nature of the error;

(ii) That the error is not a minor informality under this subsection or an error in judgment;

(iii) That the error cannot be corrected or waived under subparagraph (b) of this subsection;

(iv) That the Bidder acted in good faith in submitting a Bid that contained the claimed error and in claiming that the alleged error in the Bid exists;

(v) That the Bidder acted without gross negligence in submitting a Bid that contained a claimed error;

(vi) That the Bidder will suffer substantial detriment if the City does not grant it permission to withdraw the Bid;

(vii) That the City's or the public's status has not changed so significantly that relief from the forfeiture will work a substantial hardship on the City or the public it represents; and

(viii) That the Bidder promptly gave notice of the claimed error to the City.

(d) The criteria in subsection (c) above shall determine whether a City will permit a Bidder to withdraw its Bid after Closing. These criteria also shall apply to the question whether an City will permit a Bidder to withdraw its Bid without forfeiture of its bid bond (or other bid security), or without liability to the City based on the difference between the amount of the Bidder's Bid and the amount of the Contract actually awarded by the City, whether by award to the next lowest

Responsive and Responsible Bidder or the best Responsive and Responsible Proposer, or by resort to a new solicitation.

C. Rejection for Mistakes. The City shall reject any Bid in which a mistake is evident on the face of the Bid and the intended correct Bid is not evident or cannot be substantiated from documents accompanying the Bid (i.e., documents submitted with the Bid).

13. REJECTION OF BIDS

a. The City may reject any Bid upon a finding that the Bid meets the criteria specified in OAR 137-049-0440(1)(a) or (b) or has not provided the certification required under OAR 137-049-0440(3). The City shall reject a Bid from a Bidder who meets the criteria specified in OAR 137-049-0440(1)(c). The City may, for good cause, reject any or all bids upon a finding it is in the public interest to do so. In any case where competitive bids are required and all bids are rejected, and the proposed contract is not abandoned, new bids may be called for as in the first instance. The City may, at its own discretion, waive minor informalities.

b. This Invitation to Bid does not commit the City to pay any costs incurred by any Bidder in the submission of a Bid, or in making necessary studies, subsurface investigations or designs for the preparation of a Bid, or for procuring or contracting for the items to be furnished pursuant to the Contract Documents.

The City reserves the right to reject any or all bids when such rejection is in the best interest of the City of Ashland. Bids may be rejected if they show any alteration of form, additions not called for, conditional Bids, incomplete Bids, erasures, or irregularities of any kind.

When Bids are signed by an agent, other than the officer or officers of a corporation authorized to sign contracts on its behalf, or a member of a partnership, a "Power of Attorney" must be submitted with the Bid or on file with the City Administrator prior to opening of bids; otherwise, the Bid will be rejected as irregular.

More than one Bid from an individual, firm, partnership, corporation, or combination thereof with an interest in more than one bid, for the items bid, will be cause for the rejection of all Bids in which such individual, firm, partnership, corporation, or combination thereof, is interested.

If there is reason to believe that collusion exists among bidders, none of the bids of the participants in such collusion will be considered, and all involved bids shall be rejected. Bids in which prices are obviously unbalanced may be rejected.

14. BID PROTEST. [OAR 137-049-0260].

Bidders may, in writing protest or request changes of any specifications or contract terms in accordance with adopted City contracting rules. The written protest or request for changes must be received by the City no later than ten (10) calendar days prior to the Bid Closing Date. The written protest or request shall include the reasons for the protest or request, and any proposed changes to the bid specifications or contract terms and a description of the prejudice to the bidder. Envelopes containing bid protests shall be marked “Contract Provision Protects or Request” with the Bid Number and Closing Date. No protest against award, owing to the content of the bid specifications or contract terms shall be considered after the deadline established for submitting protests of bid specifications or contract terms.

15. ORS 654.150 SANITARY FACILITIES AT CONSTRUCTION PROJECTS STANDARDS, EXEMPTIONS

If the contract price is estimated (itemized bid) or bid (lump sum) by Contractor at $1,000,000 or more, Contractor shall be responsible for all costs (which costs shall be included in the bid whether or not a specific bid item is provided therefore) that may be incurred in complying with or securing exemption or partial exemption from the requirements of ORS 654.150 (Sanitary facilities at construction projects; standards, exemptions) and the rules adopted pursuant thereto. Determination of applicability of ORS 654.150 to the project is the sole responsibility of the Contractor.

16. PREVAILING WAGE RATE

The Contractor shall be required to follow standard billing format as set forth from State or Federal Funding sources. The Siskiyou Boulevard Waterline Replacement shall follow the current State of Oregon BOLI Wage Rates. The rates utilized will be noted at the date of the bid shown at the following location: http://www.oregon.gov/boli/WHD/PWR/Pages/pwr_state.aspx.

Attachment A

CITY OF ASHLAND

Nondiscrimination and Equal Opportunity Policy for Contractors

1. *GENERAL POLICY OF NON-DISCRIMINATION*

It is the policy of the City of Ashland to promote equal opportunity to all persons regardless of race, religion, color, national origin, sex, age, marital status, handicap, or political affiliation, in respect to employment, public services, facilities and accommodations. This policy is reinforced by obligations assumed by the City as a condition of receipt of federal and state funds. This policy thus becomes an obligation which must be assumed by the Contractor as well. Because in some cases religion, sex, age, or disability may properly be the basis for denial or restriction of privileges with respect to employment, public services, facilities or accommodations, the following more specific obligations, terms, or conditions shall apply.

2. *DISCRIMINATION BECAUSE OF RELIGIOUS BELIEF*

With respect to terms and conditions of employment and hiring only, the Contractor shall be deemed to have complied with the general obligation of according equal opportunity without regard to religion if every reasonable effort has been made to accommodate the particular religious beliefs or practices of an employee or applicant for employment, but such accommodation cannot be made without undue hardship to the employer.

3. *DISCRIMINATION BECAUSE OF SEX*

With respect to terms and conditions of employment and hiring only, the Contractor shall be deemed to have complied with the general obligation of according equal opportunity notwithstanding any rule, standard, practice, or decision which accords an employee or applicant different treatment because of sex, if such rule, standard, practice, or decision is based upon a bona fide occupational qualification which the employer cannot, without undue hardship, modify or waive to accommodate the employee or applicant.

With respect to public services, facilities, and accommodations the Contractor shall be deemed to have complied with the general obligation of according equal opportunity notwithstanding any rule, standard, practice, or decision which restricts or limits access to such on a basis of sex where:

A. Physical facilities such as restrooms, bathing facilities, dressing rooms, etc. must be segregated on the basis of sex to accord personal privacy or comply with local, state, or federal law, or ordinance, or administrative regulation; or

B. The content or subject matter of a program or service is clearly of benefit to persons of a particular sex only because it deals with medical, psychological, or sociological factors inherently linked to the characteristics of one sex only, or its effectiveness in providing benefit to persons of one sex would be unreasonably and adversely affected by the participation of persons of the opposite sex.

4. *DISCRIMINATION BECAUSE OF DISABILITY*

With respect to terms and conditions of employment and hiring only, the Contractor shall be deemed to have complied with the general obligation of according equal opportunity to persons who are physically or mentally disabled if every reasonable effort has been made to accommodate any physical or mental disabilities of an employee or applicant, but such accommodations cannot be made without undue hardship to the employer; or where, because of such disability, the employee or applicant cannot meet a bona fide occupational qualification that cannot be waived or modified without undue hardship to the employer.

With respect to public services, facilities and accommodations only, the Contractor shall be deemed to have complied with the general obligation of according equal opportunity to persons who are physically or mentally disabled where:

A. Architectural barriers limiting access to facilities owned or occupied by the Contractor cannot be eliminated without structural alterations, and are permitted to remain under the provisions of the Oregon State Structural Specialty Code; or

B. A program or activity, viewed in its entirety, is readily accessible to and usable by persons who are physically or mentally disabled.

C. The purpose of the program, service, or facility is to provide a special benefit to persons characterized by a particular handicap in some respect specially related to the educational, medical, psychological, mobility, social or economic needs of persons so disabled.

5. *DISCRIMINATION BECAUSE OF AGE*

With respect to terms and conditions of employment and hiring only, the Contractor shall be deemed to have complied with the general obligation of according equal opportunity regardless of age where:

A. Certain positions include duties which must, by law or ordinance, be performed by persons over a certain age, and the employer cannot accommodate the employment of a person under that minimum age without undue hardship;

B. The employee or applicant has passed any applicable age established by the Congress of the United States beyond which an employer may reject an employment application or mandate an employee's retirement.

With respect to public services, facilities, and accommodations only, the Contractor shall be deemed to have complied with the general obligation of according equal opportunity without regard to age where:

A. The purpose of the service, facility, or accommodation is to benefit or serve persons under 18 years of age or their adult custodians in some respect specially related to the needs of such persons; or

B. The purpose of the service, facility, or accommodation is to benefit or serve persons 65 years of age or older in some respect specially related to the educational, medical,

psychological, mobility, social, or economic needs common to persons of that age group.

6. *DEFINITIONS*

As used in this Policy, there are several terms specifically defined in various federal, state, and local laws, ordinances, and administrative regulations applicable either because of the City's receipt of federal or state funds, or because they are general laws and ordinances prohibiting discrimination. In addition, judicial and administrative decisions have created an additional body of law further defining these terms in their application. Because of the magnitude and complexity of these various legal definitions and interpretations, it is not possible to provide exhaustive definitions herein. The Contractor should be guided by the following general rules:

A. Where two separate legal definitions or interpretations may apply in a given situation, the one according the greatest degree of protection to the person entitled to their protection shall govern.

B. "Disability" and "handicap" are intended to be synonymous.

C. The Contractor is not entitled to advisory opinions or advice from City representatives as regards the specific application of this policy. It is up to the Contractor, and their own legal counsel to ascertain compliance with this policy, federal, state and local law. The City expressly disclaims any responsibility for the Contractor's reliance on advice or opinions given by City representatives.

D. The Contractor is cautioned that restrictions in deeds, leases, collective bargaining agreements, and other contracts may not in every case justify an otherwise discriminatory act, policy, or practice. The Contractor must, at his own risk and expense, comply with this Policy regardless of contractual restrictions which do not justify Contractor's acts, policies, or practices.

7. ADVERTISING AND PROMOTIONAL MATERIAL

A. In all advertising, postings, and promotional material relating to hiring, the Contractor shall include the following statement:

"_____(name of contractor)_____ is an equal opportunity employer and does not discriminate in hiring, promotion, layoff, discipline, transfer, compensation, or other terms of employment because of a person's race, religion, color, national origin, sex, age, marital status, handicap, or political affiliation."

EXCEPTION: In "classified" advertising the Contractor need only include the statement "An Equal Opportunity Employer".

B. In all advertising, postings, and promotional material relating to programs and services funded in whole or in part under a contract with the City of Ashland, the Contractor shall include the following statement:

"This _____(program or service as applicable)_____ is open to all persons without regard to race, religion, color, national origin, sex, age, marital status, handicap or political

affiliation. For further information about this equal opportunity policy, contact ___(name of contractor's representative)___ at ___(phone number)___.

8. *RETALIATION*

The Contractor shall not, in any manner, accord different or unequal treatment to or in any way discriminate against any person because of such person's filing of or participation in any grievance or complaint of discrimination contrary to its policy, whether such grievance or complaint is logged with the City of Ashland, or any state or federal court or agency.

9. *GRIEVANCE PROCEDURE*

During the term of this Contract, and for at least six months thereafter, the Contractor shall conspicuously display the attached "Notice: Your Rights to Have Discrimination Complaints Heard" in locations accessible to the public at its principal office and all other premises within the City of Ashland where it conducts any operations. Likewise, the Contractor shall fully cooperate with the designated representative of the City of Ashland and state and federal civil rights compliance agencies in investigating, mediating, and otherwise handling complaints or grievances concerning this Policy.

10. *VIOLATIONS*

Violation by the Contractor of any provision of this Policy may, in addition to any remedy accorded an aggrieved person, be cause for termination of the Contract, debarment from participation in future City of Ashland contracts, or both.

11. *CONTRACTS DIRECTLY FUNDED BY FEDERAL OR STATE AGENCIES*

If this Contract is funded in whole or in part by federal or state grants, there may be imposed on the Contractor the additional obligation of "affirmative action" to ensure equal opportunity, and specific standards and reporting requirements to be met. "Affirmative action", in general, means taking positive and affirmative steps to involve historically disadvantaged classes of persons in the performance of the work or participation in the benefits of this Contract. These steps may include special recruitment efforts, specific goals as to percentages of such persons employed in certain jobs, specific goals as to percentages of such persons employed in certain jobs, specific standards for the amount of work to be subcontracted to minority-owned businesses, etc.

If there are such additional requirements beyond this policy, the Invitation for Bids will state:

"This project is funded in whole or in part through ___(name of agency)___. Special equal opportunity requirements imposed by that agency are contained in the bid documents, and bidders are cautioned to examine them carefully in preparing their bids."

CITY OF ASHAND, OREGON

SPECIAL PROVISIONS

FOR

Wastewater Collections and Storm Drainage - CIPP
2024-28
Sewerline Construction
Stormwater Construction

PROFESSIONAL OF RECORD CERTIFICATION:

Seal w/signature EXPIRES: 12.31.2027	I certify the Special Provision Section(s) listed below are applicable to the design for the subject project for **Cured in Place Pipe - CIPP**. Modified Special Provisions were prepared by me or under my supervision. Section(s) 00100's, 00200's, 00300's, 00400's, 00600's, 00700's
Date 2.23.2026 Signed:	

WORK TO BE DONE

The Work to be done under this Contract consists of the following:

1. Install and remove Temporary Traffic Control, Erosion and Pollution Control Measures.
2. Cleaning of pipes.
3. Mainline video inspection.
4. Install cured-in-place lining.
5. Provide odor mitigation strategy or scent masking.
6. Internal service reinstatement.
7. Perform additional and Incidental Work as called for by the Specifications and Plans.

APPLICABLE SPECIFICATIONS

The Specifications that are applicable to the Work on this Project is the 2024 edition of the "Oregon Standard Specifications for Construction", as modified by these Special Provisions. All Sections in Part 00100 apply, whether or not modified or referenced in the Special Provisions.

All number references in these Special Provisions shall be understood to refer to the Sections and subsections of the Standard Specifications bearing like numbers and to Sections and subsections contained in these Special Provisions in their entirety.

CLASS OF PROJECT

This is a Local Project.

SECTION 00110 - ORGANIZATION, CONVENTIONS, ABBREVIATIONS AND DEFINITIONS

Comply with Section 00110 of the Standard Specifications modified as follows:

00110.05(e) Reference to Websites - Add the following bullet list to the end of this subsection:

ODOT Construction Section
www.oregon.gov/odot/construction/pages/index.aspx

ODOT Construction Section - Qualified Products List (QPL)
www.oregon.gov/ODOT/Construction/Pages/Qualified-Products.aspx

ODOT Construction Surveying Manual for Contractors
www.oregon.gov/ODOT/ETA/Documents_Geometronics/Construction-Survey-Manual-Contractors.pdf

ODOT Environmental Product Declaration
https://www.oregon.gov/odot/Construction/Pages/Environmental-Product-Declarations.aspx

ODOT Traffic Control Plans Unit
www.oregon.gov/ODOT/Engineering/Pages/Work-Zone.aspx

ODOT Traffic Standards
www.oregon.gov/ODOT/Engineering/Pages/Signals.aspx

00110.10 Abbreviations – Add the following paragraph to the end of this subsection:

EPD – Environmental Product Declaration

PCD - Pedestrian Channelizing Device

Delete the following paragraph:

DBE – Disadvantaged Business Enterprise

00110.20 Definitions – Add the following paragraphs to the end of this subsection:

Environmental Product Declaration - An environmental declaration providing environmental data using predetermined parameters and, where relevant, additional environmental information. *ISO 14025* refers to these as Type III Environmental Declarations.

Materially Unbalanced Bid - A Bid which generates a reasonable doubt that Award to the Bidder submitting a Mathematically Unbalanced Bid will result in the lowest ultimate cost to the Agency.

Mathematically Unbalanced Bid - A Bid containing lump sum or unit Pay Items (bid items) which do not reflect reasonable actual costs plus a reasonable proportionate share of the Bidder's anticipated profit, overhead costs and other indirect costs.

Pedestrian Accessible Route - An area for the use of pedestrians to navigate along sidewalks, driveways, curb ramps, crossings, and pedestrian facilities.

Pedestrian Channelizing Device - Devices used for channelizing pedestrians along a Temporary Pedestrian Accessible Route.

SECTION 00120 - BIDDING REQUIREMENTS AND PROCEDURES

Comply with Section 00120 of the Standard Specifications modified as follows:

00120.05 Request for Plans, Special Provisions, and Bid Booklets - Add the following to the end of this subsection:

The Plans, which are applicable to the Work to be performed under the Contract, are included in these Special Provisions.

00120.10 Bid Booklet – Replace the bullet that begins "Appendix, which includes…" with the following bullet:

Appendix, which includes required time-sensitive forms, sample forms, and other informational pages

00120.15 Examination of Work Site and Solicitation Documents; Consideration of Conditions to be Encountered - Add the following to the end of this subsection:

The Agency will hold a Non-Mandatory Prebid meeting for all holders of Solicitation Documents at the Community Development building, located at 51 Winburn Way in Ashland, Oregon at 01:00 pm on March 10, 2026.

All prospective Bidders are encouraged to attend this meeting.

Prospective Bidders will be given the opportunity to ask questions relating to any details involved in the performance of the work under the Contract.

Information distributed, statements made, or responses given to questions, by the Agency's representatives at the Prebid meeting will not in any way alter or affect any of the provisions contained in the Solicitation Documents or Contract requirements and will not be binding upon the Agency unless confirmed by Addenda.

Certain Specifications included in the Project require additional experience or personnel qualifications. Refer to the subsection requirements that may affect bidding considerations, including but not limited to the following:

Subsection	Title
00412.30	Personnel Qualifications

00120.40(b) Bidding Considerations – Add the following to the end of the list:

00160.20(d)	Build America Buy America Act Requirements

00120.60(a) Paper Bids – Replace this subsection with the following:

(a) **Paper Bids** - Information entered into the paper Bid Booklet by the Bidder may be changed after the paper Bid has been delivered to the City of Ashland, provided that:

- Changes are prepared according to the instructions identified in the Bid Booklet; and
- Changes are received at the same offices, addresses, and times identified in the paper Bid Booklet for submitting Bids; and
- The changes are submitted in writing or by electronic facsimile (FAX) transmission to the FAX number given in the paper Bid Booklet, signed by an individual authorized to sign the Bid.

A Bidder may withdraw its paper Bid after it has been delivered to the City of Ashland, provided that:

- The written withdrawal request is submitted on the Bidder's letterhead, either by hand delivery or by FAX to the FAX number given in the paper Bid Booklet; and
- The request is signed by an individual who is authorized to sign the Bid, and proof of authorization to sign the Bid accompanies the withdrawal request; and
- The request is received at the same offices, addresses, and times identified in the paper Bid Booklet for submitting Bids.

00120.70 Rejection of Nonresponsive Bids - Delete the bullet that begins "The Bidder has not complied with the DBE…".

Add the following bullet to the end of the bullet list:

The Bid is found to be Mathematically Unbalanced and Materially Unbalanced.

SECTION 00130 - AWARD AND EXECUTION OF CONTRACT

Comply with Section 00130 of the Standard Specifications modified as follows:

00130.00 Consideration of Bids - Replace the paragraph that begins "The Agency reserves…" with the following paragraph:

The Agency reserves the right to waive minor informalities and irregularities, seek clarification of any Bid or response that, in its sole discretion, it deems necessary or advisable, and to reject any Bids for irregularities under 00120.70 or all bids for good cause after finding that it is in the public interest to do so (ORS 279C.395). The Agency may correct obvious clerical errors, when the correct information can be determined from the face of the documents, if it finds that the best interest of the Agency and the public will be served thereby.

00130.40 Contract Submittals - Add the following paragraph to the end of this subsection:

The Agency, in its sole discretion, may require execution of documents identified in subsections (a), (b) and (c) with a form of electronic signature (including but not limited to sealing and signing) acceptable to the Agency.

00130.40(c) Workers' Compensation – Replace this subsection, except for the subsection number and title, with the following:

To certify compliance with the workers' compensation insurance coverage required by 00170.61(a) and 00170.70(e), the successful Bidder shall complete and sign the "Certification of Workers' Compensation Coverage" form bound in the Contract booklet.

00130.50 Execution of Contract and Bonds - Add the following paragraph to the end of this subsection:

The Agency, in its sole discretion, may require execution of documents identified in subsection (a) with a form of electronic signature (including but not limited to sealing and signing) acceptable to the Agency.

SECTION 00140 - SCOPE OF WORK

Comply with Section 00140 of the Standard Specifications.

SECTION 00150 - CONTROL OF WORK

Comply with Section 00150 of the Standard Specifications modified as follows:

00150.15(b) Agency's Responsibilities - Replace this subsection, except for the subsection number and title, with the following:

The Engineer will perform the Agency responsibilities described in the *Construction Surveying Manual for Contractors*, Chapter 1.5 (see Section 00305).

00150.15(c) Contractor's Responsibilities - Replace this subsection, except for the subsection number and title, with the following:

The Contractor shall perform the Contractor responsibilities described in the *Construction Surveying Manual for Contractors*, Chapter 1.6 (see Section 00305).

The Contractor shall perform slope staking including intersections and set stakes defining limits for clearing which approximate Right-of-Way and easements.

00150.50(c) Contractor's Responsibilities – Replace the bullet that begins "In addition to the notification required…" with the following bullet:

- In addition to the notification required in OAR 952-001-0090(7), notify the Engineer and the Utility as soon as the Contractor discovers any previously unknown Utility conflicts or issues. Contrary to the OAR, stop excavating until directed by the Engineer and allow the Utility a minimum of two weeks to relocate or resolve the previously unknown Utility issues; and

00150.50(e) Notification - Add the following to the end of this subsection:

Add the following subsection:

00150.50(f) Utility Information (No Anticipated Relocations) - Within the Project limits, there are no anticipated relocations with the Utilities listed in Table 00150-1. The Contractor shall contact those Utilities having buried facilities and request that they locate and mark them for their protection prior to construction.

Table 00150-1

Utility	Contact Person's Name, and Phone Number
City of Ashland Water Department	Dean Lebret, (541) 552-2326
City of Ashland Wastewater Department	Jason Robustelli, (541) 552-2335
City of Ashland Electric Department	Rick Barton, (541) 552-2387
Ashland Fiber Network	Chad Sobotka, (541) 552-2402
Avista Utilities	Eli Haberman, (541) 601-6185
Charter Communications	Michael Hall, (541) 500-8990
Lumen	Trevor Gilbert, (458) 231-3146

The Contractor shall notify, in writing, the Utilities listed above, with a copy to the Engineer, at least 14 Calendar Days before beginning Work on the Project. Utilities may require an on-site observer, at no cost to the Contractor.

Avista Utilities - Gas Utilities -

The Gas Utility operates a gas pipeline within the Project limits and may require an on-site safety watcher, at no cost to the Contractor.
In the event of an emergency, and in addition to the calls required by the Utilities notification system, the Contractor shall call:

- Avista Corporation 1-800-227-9187

City of Ashland Electric Department **- Power Suppliers -**

Energized power lines overhang portions of the Work with a minimum vertical clearance of 18 feet. The Contractor shall maintain at least 10 feet of safety clearance. Exceptions require written approval from the Power Supplier(s) and may require an on-site safety watcher, at no cost to the Contractor. The Contractor shall provide the Engineer a copy of the written approval of exception before beginning Work.

The Contractor shall maintain at least 10 feet of safety clearance from energized power lines. Exceptions require written approval from Power Supplier(s) and will require an on-site safety watcher at no cost to the Contractor. The Contractor shall provide the Engineer with a copy of the written approval of exception before beginning Work.

Ashland Fiber Network, Charter Communications, Lumen **- Telecommunication Utilities** –

The Contractor shall obtain written approval from Telecommunication Utilities that have fiber optic communication cable facilities, for excavating or blasting within 10 feet of a buried fiber optic communications cable. Telecommunication Utilities may require an on-site safety watcher at no cost to the Contractor for monitoring purposes. The Contractor shall provide the Engineer a copy of the written approval before beginning Work.

00150.75 Protection and Maintenance of Work During Construction

Add the following paragraph:

The Contractor shall clean and/or maintain existing streets, buildings, sidewalks, and other adjacent private improvements that are outside the work limits of this project if dirtied or damaged by construction activities.

There will be no separate or added payment for this work. This requirement includes compliance with the City of Ashland track-out ordinance.

00150.91 Post-Construction Review - Replace this subsection, except for the subsection number and title, with the following:

The Contractor shall attend a Post-Construction Review meeting to be held by the Agency prior to issuance of Final Acceptance but not earlier than 15 Days following the date of Substantial Completion. The time and place of this meeting will be announced by the Engineer at least 15 Days prior to the meeting date. The purpose of this meeting is to examine the Project for possible process improvements that may benefit future projects. The Contractor's attendance at the Post-Construction Review meeting is mandatory.

00150.97 Responsibility for Materials and Workmanship

Add the following subsection:

(c) Neither the final certificate of payment nor any provision in the Contract Documents shall relieve the Contractor of responsibility for faulty materials or workmanship and, unless otherwise specified, the Contractor shall remedy any defects due thereto and pay for any damage to other work resulting one (1) years from the date of acceptance of the complete building or installation. The City of Ashland shall give notice of observed defects with reasonable promptness.

SECTION 00160 - SOURCE OF MATERIALS

Comply with Section 00160 of the Standard Specifications modified as follows:

00160.01(a) All Materials - Replace the paragraph that begins "The Contractor shall identify…" with the following paragraph:

When the estimated value is over $10,000, the Contractor shall submit a copy of the materials purchase order or supply agreement.

Delete the paragraph that begins "For this purpose…".

SECTION 00165 - QUALITY OF MATERIALS

Comply with Section 00165 of the Standard Specifications modified as follows:
00165.10(b) Nonfield-Tested Materials – Replace this subsection, except for the subsection number and title, with the following:

Nonfield-tested Materials will be accepted according to the ODOT Nonfield Tested Materials Acceptance Guide (NTMAG), unless otherwise specified in the Contract. The NTMAG is available on the ODOT Construction Section website (see 00110.05(e)). The most current version of the NTMAG on the date of Advertisement is the version in effect for the Project.

- **(1) Rejections** – The inspection at the mill, shop, or precaster of any Material, Work or finished members will not prevent subsequent rejection, if later found damaged or defective, nor relieve the Contractor of the responsibility to correct or replace the Work at no additional cost to the Agency.
-

- **(2) Transport** – Do not ship members or piece of fabricated steel or precast member, that requires a fabrication inspection report, without the Inspector's label or marking.

00165.35(d) Certificate of Origin of Steel Materials – Replace this subsection, except for the subsection number and title, with the following:

When a certificate of material origin for steel or iron Materials is specified, complete the form furnished by the Engineer as required by 00160.20(a) for Federal-aid projects.

00165.35(e) Certificate of Origin of Construction Materials – Replace this subsection, except for the subsection number and title, with the following:

When a certificate of material origin for construction materials is specified, complete the form furnished by the Engineer as required by 00160.20(d) for Federal-aid projects.

00165.91 Fabrication Inspection Expenses – Replace the table with the following table:

TABLE 00165-3

Zone	Place of Fabrication	Reduction in Payment
1	All of State of Oregon, and the portion of the State of Washington within 50 airline miles of Portland International Airport (PDX)	$0
2	Outside of Zone 1, and up to 250 airline miles of Portland International Airport (PDX)	$300 per Calendar Day
3	Outside of Zone 2, up to 1,000 airline miles of Portland International Airport (PDX).	Round trip coach airfare from Portland, Oregon plus $300 per Calendar Day
4	Outside of Zone 3, or outside of the continental United States.	Round trip coach airfare from Portland, Oregon plus $500 per Calendar Day

SECTION 00170 - LEGAL RELATIONS AND RESPONSIBILITIES

Comply with Section 00170 of the Standard Specifications modified as follows:

00170.02 Permits, Licenses, and Taxes

Add the following bulleted items to the end of the list:

- The successful bidder shall, prior to the start of work, obtain a City of Ashland Business License. Sub-contractors on the project shall also be required to have a current business license. Licenses may be acquired through the City of Ashland Utility Office during regular business hours.

- Notify all adjacent property owners, occupants, other utility companies, and organizations operating underground facilities in the area at the time of the permit application. Provide adequate prior notice (min 48 hours or as required) to allow those impacted by the work to adjust their schedules and patterns accordingly. Coordinate & adjust work as required to accommodate requests for shared trenching, common excavation, or coordination of layout and saw-cutting when requested by concurrent construction projects and utility facility operators. Notifications can be accomplished by mail, telephone conversation, door hangers, or door-to-door visit.

Provide the following information in the notifications and update if the information provided changes:

- Who will be doing the work & for whom (name and 24 hr phone number of contractor or permit holder).
- What the project will consist of (e.g. excavation, patching, flatwork, etc),
- Where the work will be done (in the public way and/or on private property),
- When construction will begin and end (dates and time of day if outside normal working hours)

00170.07 Record Requirements - Replace the paragraph that begins "For purposes of this Subsection, the term …" with the following paragraph:

For purposes of this Subsection, the term "Contractor" includes the Contractor, all Subcontractors, Material Suppliers, and providers of rented operated Equipment (except truck drivers), at all tiers, for all subcontracts with first-tier Subcontractors, all subcontracts between the first-tier Subcontractors and their Subcontractors and any other lower-tier subcontracts, and "Related Entities" as that term is defined in OAR 734-010-0400. The Material Suppliers included in this definition are those for Aggregates, asphalt cement concrete, Portland cement concrete and the supply and fabrication of structural steel items, and Material Suppliers that provide quotes.

00170.07(a) Records Required - Replace the paragraph that begins "The Contractor shall include in its subcontracts …" with the following paragraph:

The Contractor shall include in its subcontracts, purchase orders, and all other written agreements, a provision requiring all Subcontractors, Material Suppliers and providers of rented operated Equipment (except truck drivers), at all tiers, to comply with 00170.07. The Contractor shall also require all Subcontractors, Material Suppliers, and providers of rented operated Equipment (except truck drivers), at all tiers, and Related Entities to include in their contracts, purchase orders, and all other written agreements, a provision requiring all lower-tier Subcontractors, Material Suppliers and providers of rented operated Equipment (except truck drivers) to comply with 00170.07. The Material Suppliers to which this applies are those for Aggregates, asphalt cement concrete, portland cement concrete and the supply and fabrication of structural steel items and Material suppliers that provide Material quotes and Related Entities as defined in OAR 734-010-0400.

00170.10(g) Paid Summary Report – Replace this subsection, except for the subsection number and title, with the following:

The Contractor shall submit a *Paid Summary Report* to the Engineer certifying payments made to all of its Subcontractors.

The *Paid Summary Report* shall be completed on the form provided by the Engineer and submitted to the Engineer within 20 Calendar Days of receipt of payment from the Agency for each month in which payments were made to each Subcontractor.

At the completion of the Project, submit a final *Paid Summary Report* form that provides the total amounts paid to each Subcontractor.

The Contractor shall require each Subcontractor at every tier to comply with the requirement to submit a *Paid Summary Report* within 20 Calendar Days of receipt of payment for Work on the Project and submit a final *Paid Summary Report* that provides the total amounts paid to the Subcontractor for its Work under the subcontract at the completion of the Project or completion of its Work.

00170.61(a) Workers' Compensation - Replace this subsection with the following subsection:

00170.61(a) Workers' Compensation and Employer's Liability - The Contractor shall provide workers' compensation and employer's liability coverage for on-the-job injuries as required by 00170.70(e).

00170.65(b)(1) Minimum Wage Rates – Replace the paragraph that begins "The Bureau of Labor and Industries (BOLI) …" with the following paragraph:

The Bureau of Labor and Industries (BOLI) determines and publishes the existing State prevailing wage rates in the publication *Prevailing Wage Rates for Public Works Contracts*. The Contractor shall pay workers not less than the specified minimum hourly wage rate according to ORS 279C.838 and ORS 279C.840, and shall include this requirement in all subcontracts.

00170.70(a) Insurance Coverages - Replace the paragraph that begins "**Contractor** – The Contractor shall…" with the following paragraph:

Contractor - The Contractor shall obtain the insurance specified below prior to the execution of the Contract. The Contractor shall maintain the insurance in full force at the Contractor's expense throughout the duration of the Contract and as required by an extended reporting period or tail coverage requirements, and all warranty periods that apply.

Replace the paragraph that begins "**Insurance Provisions** - The Contractor and Subcontractor(s), if…" with the following paragraph:

Insurance Provisions - The Contractor and Subcontractor(s), if any, shall obtain insurance from insurance companies or entities that are authorized to transact the business of insurance and issue coverage in the State and that are acceptable to the Agency. Insurance coverage shall be primary and noncontributory with any other insurance and self-insurance, with the exception of Workers' Compensation/Employer's Liability. The Contractor, or appropriate Subcontractor, but not the Agency, shall pay for all deductibles, self-insurance retentions and self-insurance, if any.

Replace the paragraph that begins "**Commercial General Liability** - The Contractor shall provide Commercial…" with the following paragraph:

Commercial General Liability - The Contractor shall provide Commercial General Liability Insurance written on an occurrence basis and covering the Contractor's liability for bodily injury, property damage, personal and advertising injury, products and completed operations, and contractual liability. Coverage may be written in combination with Commercial Automobile Liability Insurance with separate limits for

Commercial General Liability and Commercial Automobile Liability. Combined single limit per occurrence shall not be less than the dollar amount specified in the Special Provisions. The annual aggregate limit shall not be less than the dollar amount specified in the Special Provisions. The policy shall be endorsed to state that the annual aggregate limit of liability shall apply separately to the Contract.

Add the following to the end of this subsection:

The following insurance coverages and dollar amounts are required pursuant to this subsection:

Insurance Coverages	Combined Single Limit per Occurrence	Annual Aggregate Limit
Commercial General Liability	$2,000,000	$2,000,000
Commercial Automobile Liability	$2,000,000	(aggregate limit not required)

00170.70(b) Extended Reporting - Replace the paragraph that begins "The Contractor or Subcontractor shall…" with the following paragraph:

The Contractor or Subcontractor shall furnish certification of this extended reporting requirement as a condition to receive Third Notification under 00150.90(b) and 00180.50(g).

00170.70(c) Excess/Umbrella Liability - Replace this subsection, except for the subsection number and title, with the following:

A combination of primary and Excess/Umbrella Liability Insurance may be used to meet the required minimum limits of insurance. If any Excess/Umbrella Liability policies are in place, they must be on a true "following form" or broader coverage basis, with coverage at least as broad as provided on the underlying insurance. In addition, the limits of the underlying insurance must be sufficient to prevent any gap between such minimum limits and the attachment point of the coverage provided by the Excess/Umbrella Liability policy.

00170.70(d) Additional Insured - Replace the paragraph that begins "The liability insurance coverages of 00170.70(a)…" with the following paragraph:

Add the following paragraph and bullet to the end of this subsection:

Add the following as Additional Insureds under the Contract:

- The City of Ashland and its officers, agents, and employees

00170.70(e) Workers' Compensation - Replace the title of this subsection with "**Workers' Compensation and Employer's Liability"**

Replace the bullet that begins "Specify that all liability insurance …" with the following bullet:

- Specify that all liability insurance coverages shall be primary and noncontributory with any other insurance and self-insurance, with exception of Workers' Compensation/Employer's Liability;

Replace the bullet that begins "Include a list of all policies…" with the following bullet:

Include a list of all policies that fall under the Excess/Umbrella Liability Insurance if Excess or Umbrella Liability Insurance is used to meet the minimum insurance requirements .

00170.70(i) Insurance Requirement Review - Replace this subsection, except for the subsection number and title, with the following:

The Contractor agrees to periodic review of insurance requirements by Agency. Agency reserves the right to periodically assess risks and the adequacy of insurance coverage and in its discretion to require additional insurance coverage or increased coverage limits on existing coverages, or both.

00170.72 Indemnity/Hold Harmless - Add the following paragraph and bullets to the end of this subsection:

Extend indemnity, defense and hold harmless to the Agency and the following:

The City of Ashland and its officers, agents, and employees

SECTION 00180 - PROSECUTION AND PROGRESS

Comply with Section 00180 of the Standard Specifications modified as follows:

00180.20(d) Disadvantaged Business Enterprise (DBE) – Delete this subsection.

00180.20(e) Trucking - Replace the paragraph that begins "This Section does not apply to…" with the following paragraph:

This Section does not apply to delivery of Materials by or for or from a Supplier. This Subsection applies to all truck hauling of materials not performed with trucks owned (or rented) and operated by the Contractor.

00180.20(e)(1) Trucking - Delete the bullet that begins "Statement specifying whether the services will be provided by a DBE…".

00180.20(e)(2) Limitations - Replace the paragraph that begins "The approved trucking services agreements…" with the following paragraph:

The approved trucking services agreements shall be used for all trucking services for hauling materials not provided by trucks owned (or rented) and operated by the Contractor. The Contractor shall execute a trucking services agreement with every trucking services provider for hauling materials prior to the trucking services provider doing any Work on the Project Site.

00180.21(a) General – Replace the bullet that begins "If the Subcontractor is providing any…" with the following bullet:

If the Subcontractor is providing any of the insurance coverages as permitted under 00170.70(a), the Agency will respond within 35 Calendar Days after the Engineer's receipt of the request. (28 Calendar Days for the Agency to review and approve the Certificates of Insurance required by 00170.70(g) plus 7 Calendar Days to review and approve the subcontract request.)

Add the following subsection:

00180.40(c) Specific Limitations - Limitations of operations specified in these Special Provisions include, but are not limited to, the following:

Limitations	Subsection
Cooperation with Utilities	00150.50
Cooperation with Other Contractors	00150.55
Contract Time	00180.50(h)
Right-of-Way and Access Delays	00180.65
Closed Lanes	00220.40(e)(1)
Special Events	00220.40(e)(2)(b)
Limited Duration Road Closure	00220.40(f)
Road Closure Using Rolling Slowdown Method	00220.40(g)
Noise Control	00290.32
Regulated Work Areas	00290.34(a)
Maintenance Under Traffic	00620.43
Opening Sections to Traffic	00744.51
Opening Sections to Traffic	00745.51

The Contractor shall be aware of and subject to schedule limitations in the Standard Specifications that are not listed in this subsection.

00180.41 Project Work Schedules -

After the paragraph that begins "The Contractor shall submit a Project Work schedule meeting the requirements…" add the following paragraphs:

Submit an overall sequencing and phasing plan showing the timeline for construction of all curb ramps. Submit a list of individual curb ramps or groups of curb ramps not to exceed 32 curb ramps to include in the schedule for approval by the Engineer.

The Contractor shall include the following curb ramp tasks in the Project Work schedule:

Contractor initial site visit(s) for ramp existing conditions;

Submittal of Working Drawings for each ramp, submitted to the Agency according to 00759.03(c);

Submittal of Curb Ramp Plan(s); and

Preplacement Conference(s).

In the paragraph that begins "The Contractor shall submit a supplemental “look ahead” Project Work schedule each week to the Engineer.” add the following bullets to the end of the bullet list:

Identify date of curb ramp site visit to include Contractor and Agency, to review Working Drawings;

Identify curb ramp resubmittal of Working Drawings, as required according to 00759.03;

Identify the anticipated date of curb ramp closure;

Identify the field markings for excavation limits for curb ramps;

Identify when the curb ramp formwork begins;

Identify when the curb ramp Concrete placement begins; and

Identify the anticipated opening curb ramp date.

After the paragraph that begins "One of the following Type…" add the following paragraph:

In addition to the "look ahead" Project Work schedule, a Type A schedule as detailed in the Standard Specifications is required on this Contract.

00180.42 Preconstruction Conference - Add the following to the end of this subsection:

The Contractor shall conduct a group Utilities scheduling meeting with representatives from the Utility companies involved with this Project and the Engineer before the preconstruction conference. The Contractor shall incorporate the Utilities time needs into the Contractor's schedule submitted at the preconstruction conference.

Add the following subsection:

00180.50(h) Contract Time - There is one Contract Time on this Project as follows:

- The Contractor shall complete all Work to be done under the Contract not later than September 30, 2026.

Add the following subsection:

00180.85(c) Lane Closures - Lane closures beyond the limits specified will inconvenience the traveling public and will be a cost to the Agency.

It is impractical to determine the actual damages the Agency will sustain in the event Traffic Lanes are closed beyond the limits listed in 00220.40(e) *(*or 00220.40(f)*)*. Therefore, the Contractor shall pay to the Agency, not as a penalty, but as liquidated damages, $____ per 15 minutes, or for a portion of 15 minutes, per lane, for any lane closure beyond the limits listed in 00220.40(e) *(*or 00220.40(f)*)*.

The Engineer will determine when it is safe to reopen lanes to traffic. Assessment of liquidated damages will stop when all lanes have been safely reopened. Any liquidated damages assessed under these provisions will be in addition to those listed in 00180.85(b).

Add the following subsection:

00180.85(d) Rolling Slowdown Closures - Rolling slowdown closures beyond the limits specified will inconvenience the traveling public and will be a cost to the Agency.

It is impractical to determine the actual damages the Agency will sustain in the event Traffic Lanes are closed by the Rolling Slowdown Method. Therefore, the Contractor shall pay to the Agency, not as a penalty, but as liquidated damages, $____ per 20 minutes, or for a portion of 20 minutes, per lane, for any lane closure beyond the 20-minute limit listed in 00220.40(g).

The Engineer will determine when it is safe to reopen lanes to traffic. Assessment of liquidated damages will stop when all lanes have been safely reopened. Any liquidated damages assessed under these provisions will be in addition to those listed in 00180.85(b)*(*, but not in addition to 00180.85(c) for closures of the same lanes*)*.

Add the following subsection:

00180.85(e) Traffic Delays Beyond 20 Minutes - Stopping or holding vehicles beyond the limits specified will inconvenience the traveling public and will be a cost to the Agency.

It is impractical to determine the actual damages the Agency will sustain in the event traffic is stopped or held longer than the 20-minute limit listed in 00220.02. Therefore, the Contractor shall pay to the Agency, not as a penalty, but as liquidated damages, $____ per 20 minutes, or for a portion of 20 minutes, for stopping or holding traffic longer than 20 minutes.

Assessment of liquidated damages will stop when the Engineer determines that traffic is no longer stopped or held beyond the 20-minute limit. Any liquidated damages assessed under these provisions will be in addition to those listed in 00180.85(b).

SECTION 00190 - MEASUREMENT OF PAY QUANTITIES

Comply with Section 00190 of the Standard Specifications.

SECTION 00195 - PAYMENT

Comply with Section 00195 of the Standard Specifications modified as follows:

00195.12(d) Steel Materials Pay Item Selection - Add the following paragraph to the end of this subsection:

No Pay Items under this Contract qualify for the steel escalation/de-escalation program for this Project.

00195.50(c)(1) Cash, Alternate A – Replace this subsection, except for the subsection number and title, with the following:

Retainage will be deducted from progress payments and held by the Agency until final payment is made according to 00195.90, unless otherwise specified in the Contract.

Except as otherwise provided, the Agency will deposit the cash retainage withheld in an interest bearing account, established through the State Treasurer for the benefit of the Agency, as required by ORS 279C.560(5). Interest earned on the account shall accrue to the Contractor. Amounts retained and interest earned will be included in the final payment made according to 00195.90, unless otherwise specified in the Contract.

Any retainage withheld on Work performed by a Subcontractor will be released to the Contractor according to 00195.50(d).

00195.50(c)(2) Cash, Alternate B (Retainage Surety Bond) - Replace this subsection, except for the subsection number and title, with the following:

The Contractor may submit a Surety bond in lieu of all or a portion of the retainage required under the Contract. The Agency will accept this Surety bond unless the Agency first finds in writing good cause for rejection based on unique project circumstances in accordance with ORS 279C.560(1)(c).

The Surety bond must be in substantially the form specified in ORS 701.435 (4) (Oregon House Bill 4006, 2024), and executed by a Surety bonding company that is authorized to transact Surety business in the State

of Oregon and may not be a Surety obligation of an individual. The Surety bond and any proceeds of the Surety bond must be made subject to all claims and liens and in the same manner and priority specified for retainage under ORS 279C.550 to 279C.570 and ORS 279C.600 to 279C.625. Agency will reduce the cash retainage held by an amount equal to the value of the Surety bond and pay the amount of the reduction to Contractor according to ORS 279C.570. Any retainage withheld on Work performed by a Subcontractor will be released to the Contractor according to 00195.50(d).

When the Agency accepts a Surety bond in lieu of retainage from the Contractor, the Contractor shall accept Surety bonds from Subcontractors or Suppliers from which the Contractor has withheld retainage. At any time before final payment a Subcontractor may submit a Surety bond to the Contractor and request that the Contractor submit a Surety bond as described above for the portion of the Contractor's retainage that pertains to the Subcontractor. The Surety bond the Subcontractor provides to the Contractor must meet the Agency requirements specified in the paragraph above. When a Contractor at a Subcontractor's request obtains and submits a Surety bond under this subsection, the Contractor may withhold from payments to the Subcontractor an amount equivalent to the portion of the Contractor's Surety bond premium for which the Subcontractor is responsible in accordance with ORS 279C.560 (Oregon House Bill 4006, 2024).

Within 30 Days after a Subcontractor's request the Contractor shall provide a Surety bond as described above, and the Agency will accept the Surety bond unless:

- the Agency finds in writing good cause for rejection based on unique project circumstances in accordance with ORS 279C.560;
- a Surety bond is not commercially available;
- the Subcontractor refuses to pay to the Contractor the Subcontractor's portion of the Surety bond premium; or
- the Subcontractor refuses to provide the Contractor with a Surety bond that meets the requirements of ORS 279C.560(1)(b).

Notwithstanding 00195.50(d), within 30 Days of receiving a Surety bond from Contractor at a Subcontractor's or Supplier's request, Agency will release to the Contractor the amount held as retainage that is equivalent to the amount the Contractor submitted as a Surety bond. Contractor shall, within 30 Days after receiving a Surety bond from a Subcontractor or Supplier, release to the Subcontractor or Supplier the amount the Contractor holds as retainage that is equivalent to the amount of the Surety bond submitted, in accordance with ORS 279C.560(8).

00195.50(c)(3) Bonds, Securities, and Other Instruments - Replace this subsection, except for the subsection number and title, with the following:

Contractor may deposit bonds, securities or other instruments with the Agency or in a bank or other financial institution, to be held by Agency instead of cash retainage for the benefit of the Agency, which the Agency will accept unless the Agency first finds in writing good cause for rejection based on unique project circumstances, in accordance with ORS 279C.560(1)(c).

If the Contractor deposits bonds, securities or other instruments, and Agency does not reject the bonds, securities or other instruments as permitted by ORS 279C.560(1)(c), the Agency will reduce the cash retainage by an amount equal to the value of the bonds, securities and other instruments. Interest or earnings on the bonds, securities and other instruments accrue to the Contractor.

Bonds, securities and other instruments deposited instead of cash retainage shall be of a character approved by the Director of the Oregon Department of Administrative Services, including, but not limited to:

Bills, certificates, notes or bonds of the United States;

Other obligations of the United States or agencies of the United States;

Obligations of a corporation wholly owned by the federal government;

Indebtedness of the Federal National Mortgage Association;

General obligation bonds of the State of Oregon or a political subdivision of the State of Oregon;

Irrevocable letters of credit issued by an insured institution, as defined in ORS 706.008.

00195.50(f) Prompt Payment Policy - Replace this subsection, except for the subsection number and title, with the following:

Payments shall be made promptly according to ORS 279C.560, ORS 279C.570, ORS 279C.580 and other applicable legal requirements.

SECTION 00196 - PAYMENT FOR EXTRA WORK

Comply with Section 00196 of the Standard Specifications.

SECTION 00197 - PAYMENT FOR FORCE ACCOUNT WORK

Comply with Section 00197 of the Standard Specifications modified as follows:

00197.20(e) Standby Time - Replace this subsection, except for the subsection number and title, with the following:

If ordered by the Engineer, standby time will be paid at 50% of the hourly rental rate calculated according to this Subsection, excluding the hourly operating rate. Rates for standby time that are calculated at less than $1 per hour will not be paid. Payment will be limited to not more than 8 hours in a 24-hour period or 40 hours in a 1 week period.

00197.80 Percentage Allowances - Replace the table that shows Subsection and Percent with the following:

Subsection	Percent
00197.10 Materials	19
00197.20 Equipment	19
00197.30 Labor	29
00197.40 Special Services	19

Replace the paragraph that begins "When a Subcontractor performs ordered…" with the following paragraph:

When a Subcontractor performs ordered Force Account Work, the Contractor will be allowed a supplemental markup of 10% on each Force Account Work order.

SECTION 00199 - DISAGREEMENTS, PROTESTS, AND CLAIMS

Comply with Section 00199 of the Standard Specifications.

SECTION 00210 - MOBILIZATION

Comply with Section 00210 of the Standard Specifications.

SECTION 00220 - ACCOMMODATIONS FOR PUBLIC TRAFFIC

Comply with Section 00220 of the Standard Specifications modified as follows:

00220.01(b) Abbreviations - Delete this subsection.

00220.02(a) General Requirements - Add the following bullets to the end of the bullet list:

When performing trench excavation or other excavation across or adjacent to a Traffic Lane on a Roadway having a pre-construction posted speed greater than 35 mph, backfill the excavation, install Surfacing, and open the Roadway to traffic by the end of each work shift. Install a "BUMP" (W8-1-48) sign approximately 100 feet before the backfilled area and a "ROUGH ROAD" (W8-8-48) sign approximately 500 feet ahead of the "BUMP" sign. If this requirement is not met, maintain all necessary lane or shoulder closures and provide additional TCM, including flagging, at no additional cost to the Agency. Do not use temporary steel plating to reopen the Roadway.

When an abrupt edge is created by excavation, protect traffic according to the "Excavation Abrupt Edge" and the "Typical Abrupt Edge Delineation" configurations shown on the Standard Drawings.

When paving operations create an abrupt edge, protect traffic by installing a "DO NOT PASS" (R4-1) sign before the Work Area at sign spacing "A" from the TCD Spacing Table" shown on the Standard Drawings. Alternate "ABRUPT EDGE" (CW21-7) signs with appropriate (CW21-8) rider and "DO NOT PASS" (R4-1) signs at 1/2 mile spacings. Install a "BUMP" (W8-1) sign 100 feet prior to the transverse paving edge.

Protect pedestrians in pole base excavation areas by placing approved covers over all pole base excavations. Place a minimum of two B(II)LR barricades adjacent to and on either side of the excavated area, facing pedestrian traffic, or place covers and barricades as directed.

Provide a licensed tow truck service for responding to stranded or disabled vehicles within the Project limits. Provide the tow truck service during the hours designated in 00220.40(h), and as directed by the Engineer.

00220.02(b) Temporary Pedestrian Accessible Route Plan - Add the following bullets to the end of the bullet list:

Maintain access to bus stops and Pedestrian Accessible Routes.

00220.60(a)(1) Contractor Responsibility - Replace this subsection, except for the subsection number and title, with the following:

- If this Work is not completed and in place, the Agency may do the Work according to 00220.60(d).

- **(a)** Do the following at no additional cost to the Agency:
  - Keep surfaces being used by Public Traffic free of all dirt, mud, gravel, materials, and debris.
  - Repair damage to surfaces caused by the Contractor's operations.
  - Maintain all detour and stage construction Surfacing as specified or directed.

SECTION 00221 - COMMON PROVISIONS FOR WORK ZONE TRAFFIC CONTROL

Comply with Section 00221 of the Standard Specifications modified as follows:

00221.06 Traffic Control Plan - Replace this subsection with the following subsection:

00221.06 Traffic Control Plan and Tourist-Oriented Directional and Business Logo Signs –

- **(a) Traffic Control Plan** - Submit one of the following, 5 Calendar Days before the preconstruction conference:

  - **(1) Agency Traffic Control Plan** - If the Contractor intends to use the Agency TCP without modification, a written notification indicating that the Agency TCP will be used without modification.
  - **(2) Contractor-Modified Traffic Control Plan** - The Contractor may request to use a Contractor-modified Agency TCP, or a TCP developed by the Contractor. Do not use a modified TCP, or a TCP developed by the Contractor, unless approved by the Engineer. Use the Agency TCP unless a modified TCP, or a TCP developed by the Contractor is accepted.
  - The Engineer is not obligated to consider any modified Agency TCP or a TCP developed by the Contractor. The Agency will not be liable to the Contractor for failure to accept or act upon any request for a modified Agency TCP or a TCP developed by the Contractor.
  - To conserve time and funds, the Contractor may first submit a written request for a preliminary review by the Engineer. The request should contain a description of the proposal together with a rough estimate of anticipated dollar and time impacts. The Engineer will, within a reasonable time, respond to the Contractor in writing whether or not the request would be considered by the Agency.
  - If requesting a Contractor-modified Agency TCP, or a TCP developed by the Contractor, at a minimum the request shall meet all requirements of the Contract documents and comply with the Project transportation management plan (TMP). Provide the following information:

Stamped Working Drawings according to 00150.35 that include the proposed TCP showing all TCM and quantities of TCD.

- A TPAR plan that includes:

  Details and features used to provide pedestrian accessibility.

  Pedestrian staging Plans at a scale no smaller than 1 inch = 50 feet.

Temporary alternate facilities or detour routes for pedestrian traffic.

- Staging sequences and details for Work affecting vehicular, pedestrian, and bicycle traffic.
- Proposed order and duration of the TCM.
- A detailed temporary striping plan.

If the Contractor's request to use a Contractor-modified Agency TCP, or a TCP developed by the Contractor is approved in whole or in part, acceptance will be made by a Change Order.

The Engineer will establish prices that represent a fair measure of the value of Work to be added, changed, or deleted as a result of any accepted modifications to the Agency TCP or an accepted TCP developed by the Contractor.

Once a TCP has been accepted by the Engineer, any additional modifications must be submitted by the Contractor for Agency review following the procedure described above. The Engineer is not obligated to consider additional modifications to a previously approved TCP.

- **(b) Tourist-Oriented Directional and Business Logo Signs** - Submit one of the following for approval, at least 5 Calendar Days before the preconstruction conference:

  - **(1) No Signs** - If there are no tourist-oriented directional (TOD) or business logo signs on the Project, a written notification that no TOD or business logo signs exist within the Project limits or
  -
  - **(2) Signs** - Submit one copy of a sketch map of the Project showing all existing TOD and business logo signs and a written narrative describing how these signs will be kept in service and protected throughout all the construction stages. If modifications are necessary, submit updated information to the Engineer for approval at least 21 Calendar Days before the change is needed.

00221.60 Temporary Traffic Control Devices – Replace the paragraph that begins "TCD delivered to the Project Site found…" with the following paragraph:

Repair or replace TCD delivered to the Project Site found to be in "marginal" or "unacceptable" condition, at no additional cost to the Agency.

00221.90(b) Temporary Protection and Direction of Traffic – Replace the bullet that begins "Providing, Surfacing, maintain…" with the following bullet:

Providing, surfacing, maintaining, removing, and restoring the TPAR. Add the following bullets to the end of the bullet list:

SECTION 00223 - WORK ZONE TRAFFIC CONTROL LABOR AND VEHICLES

Comply with Section 00223 of the Standard Specifications modified as follows:

Add the following subsection:

00223.28 Tow Truck - Use a Class "A" tow truck conforming to the following:

-

10,000 pounds minimum manufacturers gross vehicle weight rating.

Single rear axle with dual wheels.

6 Ton boom rating - dual or single boom.

Minimum 100 feet of 3/8" cable.

In good operating condition.

Equipped with roof or post mounted rotating red or amber lights or strobe lights that are visible for 360°.

Equipped with all Equipment and materials necessary to perform the required operation.

Portable, self-contained two-way radio and repeaters, as required, with a range suitable for communication throughout each Work Zone, unless otherwise directed.

00223.38 Tow Truck Operator - Provide a tow truck operator who has:

The mental and physical ability to safely operate the tow truck

The training and experience required to operate the tow truck

ANSI Performance Class 2 or 3 upper body garment to be worn while on the Roadway retrieving a disabled vehicle

Valid Commercial Driver License

Add the following subsection:

00223.48 Tow Truck - Position the tow truck in a location as directed. Use the tow truck to remove disabled vehicles from the Traffic Lanes as needed. Tow the vehicles to the nearest off-ramp and out of traffic, or to an alternate site previously arranged with the Engineer. Return the tow truck immediately to the assigned station.

00223.80 Measurement - Replace the bullet that begins ”The replacement of TCD and TCM…” with the following bullet:

The replacement of flagger station lighting damaged by Public Traffic and replaced by the Contractor.

Add the following paragraph to the end of the bullet list:

No additional measurement will be made for automated flagger assistance devices damaged by Public Traffic and replaced or repaired by the Contractor.

Add the following subsection:

00223.80(b)(6) Tow Truck - The quantity for tow trucks will be measured on the time basis, of the actual number of hours tow trucks are operated.

00223.90 Payment - Add the following Pay Item(s) to the Pay Items list:

(i) Tow Truck.....Hour

Payment for item (i) performed beyond the quantity shown in the Contract Schedule of items will be made at the Contract unit price if the Engineer determines that the Contract unit price does not exceed the value

of the Work as determined according to Section 00197. If the Engineer determines that the Contract unit price exceeds the value of the Work, payment for the Additional Work will be made according to 00195.20.

Item (i) includes fully operated tow truck, two-way radios, and warning lights on each vehicle.

SECTION 00224 - TEMPORARY TRAFFIC CHANNELIZING DEVICES

Comply with Section 00224 of the Standard Specifications.

SECTION 00228 - TEMPORARY PEDESTRIAN AND BICYCLIST ROUTING

Comply with Section 00228 of the Standard Specifications.

SECTION 00240 - TEMPORARY DRAINAGE FACILITIES

Comply with Section 00240 of the Standard Specifications.

SECTION 00253 - TEMPORARY WORK ACCESS AND CONTAINMENT

Comply with Section 00253 of the Standard Specifications.

SECTION 00280 - EROSION AND SEDIMENT CONTROL

Comply with Section 00280 of the Standard Specifications modified as follows:

00280.00 Scope - Replace the paragraph that begins "This Work also consists of providing temporary …" with the following paragraphs and bullets:

This Work also consists of providing temporary erosion and sediment control (ESC) measures and furnishing, installing, moving, operating, maintaining, inspecting, and removing ESC throughout the Project area according to the Standard Drawings, the erosion and sediment control plan (ESCP), the Specifications, or as directed, until the site is permanently stabilized. Included also is the monitoring of weather, of stormwater and receiving waters, the reporting of monitoring observations, the reporting of corrective actions (when necessary) and the updates and revisions of the ESCP, including ESCP cover sheet, necessary to keep it representative of current site conditions and compliant with the NPDES 1200-CA, 1200-CN, OR 1200-C permit if applicable.

Conditions requiring NPDES 1200 permits are as follows:

- Projects with one acre of ground disturbance or more on Agency owned land are regulated under the Agency's 1200-CA permit.
- When Project Work on Agency owned land disturbs less than one acre, but ground disturbances on non-Agency owned lands combined with Project ground disturbances on Agency owned land total one acre or more the Agency Project Work will be regulated by the Agency's 1200-CA permit. The Contractor is responsible for acquiring the 1200-C permit for all areas of disturbance on non-Agency owned land.

When the combined areas of disturbance of all Project related activities is less than one acre, no NPDES 1200 permit coverage is required.

The area of ground disturbance on Agency owned land is _____ acres.

Delete the paragraph that begins “When contaminants, pollutants or hazardous materials…”.

Add the following paragraph to the end of this subsection:

The Agency's NPDES 1200-CA permit is applicable to the Project.

Add the following paragraphs to the end of this subsection:

Fill in required information listed on the ESCP cover sheet prior to beginning of construction and submit revised cover sheet to Engineer 10 Days before the preconstruction meeting. Monitor weather, stormwater runoff, and receiving waters, and document monitoring observations. Immediately upon discovery, notify Engineer if a 1200-CA permit non-compliance occurs. Provide updates and revisions of the ESCP, including ESCP cover sheet, necessary to keep it representative of current site conditions and compliant with the 1200-CA permit.

When contaminants, pollutants or hazardous materials are discovered in the Project location in soils or groundwater comply with 00290.20(f) and, provide an environmental management plan (EMP) as required by the 1200-CA permit if applicable.

00280.14(e) Slope and Channel Liner Matting - Replace the bullet that begins “Type A – Slope…” with the following bullets:

Type A: Hydraulically-Applied – Hydraulically-applied material composed of long strand, thermally processed wood fibers, crimped, interlocking fibers and performance enhancing additives meeting the following criteria:

- Flexural rigidity when wet, and equal to or greater than 5 oz-yd.
- Permissible shear stress 1.0 lbs/sqft or greater
- Thermally processed wood fibers – 73%
- Crosslinked hydro-colloid tackifiers and activators – 10% + 1%
- Crimped, interlocking fibers - 5% +1%
- Moisture content – 12% + 3%
- Fully Biodegradable
- A cure time of less than 2 hours during wet weather.

Type A: Rolled – Rolled slope protection mat, fully biodegradable, for Clay Soil Slopes 1V:3H or flatter.

00280.15(d) Temporary Slope Drains – Replace this subsection, except subsection number and title, with the following:

Furnish either plastic pipe and flared end sections meeting the requirements of Section 02415 or metal pipe and flared end sections meeting the requirements of Section 02420.

00280.15(f)(1) Filter Sock Material - Add the following sentence to the end of this subsection:

Furnish filter sock Material with a diameter of ____ inches.

00280.16(a) Construction Entrances - Replace the bullet that begins "**Geotextile**…" with the following bullet:

Geotextile - Riprap geotextile meeting the requirements of 02320.20 Table 02320-2. Provide documentation according to 02320.10(c).

00280.16(c) Sediment Fence - Replace the bullet that begins "**Geotextile**…" with the following bullet:

Geotextile - Geotextile meeting requirements of 02320.20 Table 02320-3. Provide documentation according to 02320.10(c).

00280.16(d) Inlet Protection - Replace the bullet that begins "**Geotextile**…" with the following bullet:

Geotextile - Type 1 geotextile meeting the requirements of 02320.20 Table 02320-1 Provide documentation according to 02320.10(c).

00280.16(g) Temporary Energy Dissipater - Replace the bullet that begins "**Geotextile**…" with the following bullet:

Geotextile - Type 1 riprap geotextile meeting the requirements of 02320.20 Table 02320-2. Provide documentation according to 02320.10(c).

00280.30 Erosion and Sediment Control Manager –

Add the following bullet to the beginning of the bullet list under "The ESCM duties include:"

- Be present at the Project Site during all ground disturbing activities.

Replace the bullet that begins "Monitor rainfall, snow melt and runoff …" with the following bullet:

- Visually monitor rainfall, snow melt and runoff at the Project Site.

Replace the bullet that begins "Monitor water quality in receiving streams in …" with the following bullet:

- Visually monitor water quality in receiving streams in the vicinity of the Project Site.

Replace the bullet that begins "Monitor water in sediment traps receiving …" with the following bullet:

- Monitor the pH of the water in sediment traps receiving runoff from soils amended with cementitious material for acidity or alkalinity.

00280.41(c) Wet Season Work and Temporary Work Suspension - Replace this subsection with the following subsection:

00280.41(c) Temporary Work Interruption - Update the ESCP and schedule for Work proposed between October 1 and May 31 to ensure that all appropriate controls, including ESC during Work interruption, are implemented and maintained. Submit the updated ESCP and schedule to the Agency and receive approval before beginning any Work between October 1 and May 31.

Between October 1 and May 31, limit excavation and bare ground activities to only those required for immediate operations. Stabilize stockpiles at the end of each workday by diverting flows, placing covers, or installing Sediment barriers.

00280.41(f) Hauling Material – Replace this subsection, except for the subsection number and title, with the following:

Cover loads carrying soil or sediment which may generate dust. Haul saturated loads in water tight beds or drain saturated loads prior to leaving the Project Site.

00280.41(g) Underground Injection Controls (UIC) – Replace this subsection, except for the subsection number and title, with the following:

Do not allow storm water from work area to enter Underground Injection Control (UIC) inlets, UIC catch basins or UIC wells.

00280.62 Inspecting and Monitoring – Delete the paragraph that begins “Inspect the Project Site…”.

00280.62(a) Inspection - Replace the paragraph that begins "Perform site inspection, complete…" with the following paragraph:

Inspect the Project Site and all ESC devices for Effective Function and potential erosion or sediment movement and complete all applicable parts of the ODOT Erosion Control Monitoring Form, and submit the form to the Agency as follows:

00280.64(a) Corrective Action Timelines – Delete the bullet that begins “If completion of corrective action is not feasible…”

Delete the bullet that begins “Provide a schedule for clean-up and corrective actions…”

Delete the bullet that begins “Provide all corrective action documentation and photographs…”

00280.64(b) Corrective Action Documentation – Add the following bullets to the beginning of the bullet list:

If completion of corrective action is not feasible within 24 hours, document the reasons why the time line cannot be met.
Provide a schedule for clean-up and corrective actions that restores Effective Functioning as soon as feasible. If schedule cannot be met document the reasons for the delay.
Provide all corrective action documentation and photographs to Agency within 24 hours of completion of corrective actions.

00280.91 Payment – Replace the paragraph that begins “Emergency Materials that are incorporated…” with the following paragraph:

Materials listed in 00280.48 that are incorporated into the Project will be paid for under the appropriate items listed in the Contract Schedule of Items.

SECTION 00290 - ENVIRONMENTAL PROTECTION

Comply with Section 00290 of the Standard Specifications modified as follows:

Add the following subsection:

00290.30(a)(7) Water Quality:

- Do not discharge water contaminated by pollutants including sediment, drilling fluids and waste, concrete, grout, or water contained within a work area isolation, into any waters of the State or U.S. or conveyances draining thereto until it has been treated using Materials such as those listed in 00280.15 or 00280.16 or by pumping to a vegetated upland location. Do not allow Project discharges to increase the concentration of any pollutant in the receiving water to a level that exceeds the limits prescribed by OAR 340-041.
- Do not use permanent stormwater quality treatment facilities to treat construction runoff unless prescribed by an ESCP approved under Section 00280.
- If construction discharge water is released using an outfall or diffuser port, do not exceed velocities more than 4 feet per second, and do not exceed an aperture size of 1 inch.
- Implement containment measures adequate to prevent pollutants from entering waters of the State or U.S. Such pollutants include but are not limited to construction and demolition materials, waste spoils, fuel or petroleum products, detergents, silt, welding slag and grindings, concrete sawcutting by-products and sandblasting abrasives.
- Do not allow curing concrete or grout to be submerged within waters of the State or U.S. less than 24 hours after placement, except within work area isolation. Do not end-dump riprap into the waters of the State or U.S. Place riprap from above the ordinary high water line.
- Monitor weather and streamflow forecasts and conditions to anticipate high flows that may unintentionally inundate any portion of the Project Site.
- If high flow conditions occur or are anticipated to occur that may unintentionally inundate any portion of the Project Site, remove all potentially affected Equipment, Materials, and debris from the potential inundation area. Cease Work in the area until water recedes and the risk of further high water events passes. The Engineer retains the authority to temporarily halt or modify the Work in case of excessive turbidity or damage to natural resources.
- If Work in or around waters of the State or U.S. violate permit conditions or any requirement of this subsection, stop such Work and notify the Engineer.

00290.30(b) Pollution Control Plan - Add the following to the end of this subsection:

Comply with the following, and, as applicable, with OAR 731-005-0800 for contracts subject to OAR chapter 731, division 5 or 7 or with OAR 731-149-0020 for contracts subject to OAR chapter 731, division 149.

Prior to beginning On-Site Work, submit a listing of proposed non-road diesel equipment and on-road trucks to the Engineer as required in (1) and (2) below that demonstrates how compliance with OAR 731-005-800 or OAR 731-149-0020 will be achieved. Update the listing of non-road diesel equipment and on-road trucks specified in (1) and (2) below when additional pieces of non-road diesel equipment or on-road trucks, not previously accounted for, are brought onto the Project Site. Provide the updated list to the Engineer upon request.

On a monthly basis certify compliance with OAR 731-005-800 or OAR 731-149-0020 and submit the certification with a list of non-road diesel equipment and on-road trucks specified in (1) and (2) below utilized to date on the Project Site to the Engineer and include calculations demonstrating compliance according to OAR 731-005-800 or OAR 731-149-0020.

Failure to submit the monthly listings, certifications and calculations may result in withholding payments according to 00195.50(e).

Immediately remove from the Project Site, according to 00180.30, non-road diesel equipment and on-road trucks used on the Project Site in violation of OAR 731-005-800 or OAR 731-149-0020, or 00290.30. Update the listing of non-road diesel equipment and on-road trucks with a notation for any that were removed.

- **(1) Non-Road Diesel Equipment** - Demonstrate compliance with OAR 731-005-800 or OAR 731-149-0020 by listing all non-road diesel equipment (as defined in OAR 731-005-0430) that is 25 horsepower or greater utilized to date on the Project Site and including the following:
    - Equipment owner and whether the piece of equipment is owned and operated by a COBID certified firm
    - Equipment type
    - Manufacturer
    - Model number
    - Vehicle identification number or serial number
    - Engine certification (Tier rating)
    - If not equipped with a Tier 4 compression ignition diesel engine, specify whether the engine has been retrofitted with a Verified Diesel Oxidation Catalyst or Verified Diesel Particulate Filter
    - Specify whether the equipment qualifies for an exemption provided in OAR 731-005-0800(5) or OAR 731-149-0020(4) and which exemption applies
    - The above required certifications and calculations
-
- **(2) On-Road Concrete Mixer Trucks and Dump Trucks** - Demonstrate compliance with OAR 731-005-800 or OAR 731-149-0020, by listing all diesel powered on-road concrete mixer trucks and on-road dump trucks utilized to date on the Project Site that are owned or operated by the Contractor, Subcontractors and those operated under trucking services agreements, including:
    - Equipment owner and whether the piece of equipment is owned and operated by a COBID certified firm
    - Vehicle identification number or serial number
    - Engine model year
    - Motor vehicle license plate number
    - The above required certifications and calculations

00290.30(c)(1) Vehicle and Equipment Idling - Replace this subsection, except for the subsection number and title, with the following:

Establish truck staging areas for diesel-powered vehicles located where truck emissions have a minimum impact on sensitive populations, such as residences, schools, hospitals and nursing homes.

Ensure that all diesel powered Equipment has a decal visible to the operator, reminding them to limit idling to a maximum of 5 minutes. Post at least 1 notice in a location frequented by employees or workers stating diesel equipment idling is limited to 5 minutes.

Limit idling of trucks and other diesel powered Equipment to 5 minutes, when the Equipment is not in use or in motion, except as follows:

When safety of contractors, Subcontractors or Suppliers or their employees may be compromised.

Frequent shutdowns may be detrimental to the exhaust control system.

When traffic conditions or mechanical difficulties, over which the operator has no control, force the Equipment to remain motionless.

When operating the Equipment's heating, cooling or auxiliary systems is necessary to accomplish the Equipment's intended use.

To bring the Equipment to the manufacturer's recommended operating temperature.

When the outdoor temperature is below 20 °F.

When needed to repair Equipment.

Under other circumstances specifically authorized by the Engineer.

00290.32 Noise Control - Add the following paragraphs to the end of this subsection:

All work on this project may be performed Monday through Friday, between the hours of 7:00 a.m. and 5:00 p.m., local time. Work outside these hours may be requested by the Contractor and the City will review each request and either approve or deny the request. The actual starting and stop times of each street will be discussed at the preconstruction meeting.

00290.50 Protection of Cultural Resources – Replace the paragraph that begins "Comply with all Laws…" with the following paragraph:

Comply with all Laws governing preservation of cultural resources. Cultural resources include, but are not limited to:

Historic buildings (i.e. typically 50 years of age and older)

Historic structures (i.e. bridges)

Sites (i.e. sites with artifacts)

Objects (i.e. monuments)

Districts (i.e. historic districts, or linear historic districts like historic roads).

Replace the paragraph that begins "If cultural resources are…" with the following paragraph:

If cultural resources not previously identified in preconstruction are encountered on the Project area or in material sources, and their disposition is not addressed in the Special Provisions, do the following:

SECTION 00305 - CONSTRUCTION SURVEY WORK

Comply with Section 00305 of the Standard Specifications.

SECTION 00330 - EARTHWORK

Comply with Section 00330 of the Standard Specifications modified as follows:

00330.41(a)(4) Excess Materials - Replace this subsection, except for the subsection number and title, with the following:

- If the quantities of excavated materials are greater than required to construct embankments and to do all filling and backfilling, the Contractor may use the remaining materials to uniformly widen embankments or to flatten slopes in a manner satisfactory to the Engineer.

00330.41(a)(5) Waste Materials - Replace this subsection, except for the subsection number and title, with the following:

Unless otherwise specifically allowed and subject to the requirements of Section 00280, dispose of materials, classed as waste materials in 00330.41(a)(3), outside and beyond the limits of the Project and Agency controlled property according to 00290.20. Do not dispose of materials on Wetlands, either public or private, or within 300 feet of rivers or streams.

00330.91(d) General Excavation - Delete the bullet that begins "Includes Unsuitable Material…".

00330.92 Kinds of Incidental Earthwork - Add the following bullets to the end of the bullet list:

Excess material used to widen embankments or flatten slopes according to 00330.41(a)(4).

Earthwork required for driveways and road approaches. Earthwork for driveways and road approaches will be that which is outside the Neat Line limits shown on the typical sections.

00330.94 Embankment Basis Payment - Delete the paragraph that begins "Excavation of unstable…".

SECTION 00405 - TRENCH EXCAVATION, BEDDING, AND BACKFILL

Comply with Section 00405 of the Standard Specifications modified as follows:

00405.41(a) Within Paved Areas to be Preserved - Add the following to the end of this subsection:

Do not use the open excavation method for installing pipes transversely.

00405.90 Payment - In the paragraph that begins “No separate or additional…” delete the following bullet:

sawcutting

Add the following sentence to the end of the subsection:

Sawcutting will be paid for according to Section 00310.

SECTION 00406 - TUNNELING, BORING, AND JACKING

Comply with Section 00406 of the Standard Specifications.

SECTION 00410 - REHABILITATE EXISTING PIPE

Section 00410, which is not a standard specification, is included in this Project by Special Provision. Replace this section in its entirety with the following:

Description

00410.00 Scope - This work consists of rehabilitating existing pipes by furnishing and installing pipe liners by pipe bursting and lining, slip lining, and cured-in-place lining as shown.

00410.01 Definitions:

Cured-In-Place Pipe (CIPP) - Inserting a resin impregnated tube into an existing pipe, expanding it, and curing it to form a new lined pipe.

Gravity Pipe - Pipe designed to convey fluids under conditions where the hydraulic gradient and free-water surface are coincident within the pipe.

Host Pipe - The existing pipe to be lined.

Obstruction - An object that protrudes into the host pipe that may impede the liner installation, create an unfavorable condition after the liner has been installed, and may not be removed by conventional cleaning equipment. This may be a protruding service lateral tap, grout or mineral deposit, heavy roots, off set joint, broken or collapsed pipe, change in internal pipe diameter, or similar condition.

Pipe Bursting and Lining - Breaking and expanding the diameter of an existing pipe and inserting a new pipe inside the broken pipe.

Slip Lining - Inserting a new smaller diameter pipe into an existing pipe and filling the remaining annular space.

Point Repair - A localized repair of the host pipe to a condition suitable for pipe lining.

Service Line - A 4-inch or 6-inch wastewater pipe that extends from a wastewater customer's facility to the public wastewater collection system, sometimes referred to as a lateral.

Service Line Connection - A side or lateral pipe connection to the sewer main.

Sewer Connection Record - A written record or drawing of the location of the private service line connection to the public wastewater collection system.

Wastewater - The Contractor shall be working on wastewater and storm water pipes. The term wastewater is interchangeable with storm water throughout this Section.

00410.02 Information Available to Contractor - The following is a list of resources for the Contractor's reference:

- Inspection reports are available upon request to provide information on the host pipe, and approximate location of service line connections.

The Agency encourages all bidders to investigate the location of the pipes and manholes, and to view the Agency's inspection reports prior to bidding.

00410.03 Submittals -

- **Bid Submittals:** Include the following with the Contractor's sealed Bid:

Completed Statement of Qualification (form included in the Bid documents). Completed Liner Product Information Sheet (form included in the Bid documents).

- **Post-Bid Submittals:** Submit the following to the Engineer 10 calendar days before the preconstruction conference:

  - Installation plan that includes the method of installation, sequencing, host pipe preparation, temporary modification of existing structures, equipment by size, make, model and manufacturer.
  - Manhole connection and repair plan.
  - Service connection details and product information.
  - Property notification fliers.
  - Host pipe point repair plan, including methods and equipment.
  - Sewer cleaning methods and locations of manholes to return wastewater to the collection system.
  - Bypass and flow diversion plan according to 00490.40.
  - Submit pre-installation video inspection and reports 7 calendar days before beginning pipe lining work.

Submit for approval a complete and accurate pre-liner video inspection log 7 days before beginning pipe lining work. Do not proceed with liner work until the Engineer approves the pre-liner video inspection log. Use the Agency standard pre-liner video inspection log form or approved equal. Include the condition of the host pipe (i.e., structural defects, remaining grout deposits and protruding taps, or other obstructions), list all the service line connections (both active and inactive) and indicate the diameter of the active services. Logs without clear indication as to the activity status of a service line will be rejected.

Submit post-installation video inspection reports. The installation of the liner system improvements shall not be considered substantially complete until the video inspection recordings are received, reviewed, and accepted by the Engineer.

Materials

00410.10 Chemical Grout - Chemical grouting materials for Service Line Connections shall be Avanti AV-100 or approved equal.

Equipment

00410.20 By-pass Pumping Equipment - Provide pumps, hoses, manifolds, and associated equipment meeting requirements of 00490.40.

00410.22 Pipe Cleaning Equipment - Provide equipment specifically designed for cleaning sanitary and storm sewers. Provide special cutting and grinding attachments required to remove obstructions from host pipe before lining.

00410.23 Debris Transport Equipment - Provide equipment specifically designed to contain and transport debris removed from sewers.

00410.24 Video Inspection - Provide video equipment meeting the requirements of 00415.

00410.25 Electronic Location Device - Provide electronic underground locating equipment according to 00415.21(c).

Construction

00410.40 General - Verify existing host pipe diameter, length, and condition before ordering materials. Field determination of the activity status and diameter of service lines are the responsibility of the Contractor.

00410.41 Pipe Cleaning- No more than 2 hours before installing the liner, perform a final cleaning of the segment to be lined. Flush and clean all parts of the host pipe to remove debris and foreign material. Cleaning methods may include washing with high-pressure water, mechanical removal, sandblasting of the walls, entry with hand tools, or other methods as approved.

Do not use chemicals without written approval of the Engineer.

Transport and dispose of all material removed from the host pipe back into the collection system at a downstream manhole.

Service connections protruding into the host pipe more than 10 percent of its diameter or as directed by the Engineer shall be cut from inside the host pipe with mechanical cutting equipment until flush.

If areas of the host pipe are deteriorated to the extent that internal removal of protruding taps would cause increased damage to the pipe, notify the Engineer for evaluation. Do not design or manufacture a liner for that segment until directed by the Engineer.

Obtain and keep on site all required state and local hauling and disposal permits. The Contractor may dispose of all material removed from the host pipe back into the collection system at a downstream manhole. Conduct work that prevents blockage and minimizes surcharging in the sewer manholes and connecting sewer pipelines.

00410.43 Pre-Construction Video Inspection - After cleaning existing gravity pipe, perform pre-construction video inspection according to Section 00415.

00410.44 Host Pipe Preparation - Before installing the liner remove obstructions and perform pipe repairs as shown or as required by the lining method.

00410.45 Property Notification - The Contractor shall provide a written notice to all residents at least 2 calendar days, but no more than 5 calendar days, before construction begins adjacent to their property that will directly affect wastewater service. Businesses shall be given at least 7 calendar days advanced notice.

Deliver a written notice to the residents and business owners. An example of the written notice to be used shall have the approval of the City of Ashland prior to distribution. The notice shall include the project name and number, the contractor's and subcontractor's names, daytime and after-hours emergency contact person and phone numbers, along with the Agency's project representatives and a description of the proposed work, anticipated impacts, the date, start time and estimated time when service will be completely restored.

For multi-family and apartment units, the Contractor shall make direct contact with the site manager and work directly with them to coordinate the construction activities and minimize impacts at least 5 calendar days in advance. Make personal contact with any property that cannot be reconnected within the time stated in the written notice. Obtain permission from the property owner before entering private property.

00410.46 Bypass Pumping and Flow Diversion - Perform bypass pumping according to 00490.40. Contain or divert flows from service lines until reconnected. Install temporary connections as needed to prevent the spilling or pooling of raw sewage.

00410.47 Structure Restoration - Seal all holes and voids in manhole and structure walls immediately surrounding the new liner. Provide a smooth transition between the existing structure channel invert and the liner.

Reinstall manhole cones, slabs, grade rings, frames, covers, inverts, and reconstruct benches and channels after each pipe liner installation. Do not replace manhole steps removed for liner installation with new steps, as shown. Repair holes resulting from removal of existing steps as approved.

00410.48 Surface Restoration - The Contractor may excavate some Service Line Connections as approved. Do not expose or disturb material around the Host Pipe. Excavations must be filled within 48 hours. Install construction fencing around excavations and provide lighted barricades during hours of darkness.

Restore damaged surfacing according to 00495 within 5 workdays of the liner installation. If resurfacing of affected areas is not completed within 5 workdays, the Engineer may limit or halt the work to allow surfacing crews to catch up. No additional contract time will be granted to the Contractor.

Where access is restricted by a fence within an alley right-of-way or easement area coordinate its removal with the individual property owners. Replace all fencing and posts removed or damaged by construction to original or better condition within 5 workdays. Provide and install temporary fencing for fence openings that will remain overnight.

Permanent repairs must be made within 5 workdays unless the property owner agrees to an additional time.

Restore original ground profiles including reestablishing ditches to the original grade. Haul excess soil material off site.

00410.49 Service Line Reconnections - Unless the liner installation requires a 12-hour stabilizing period according to 00411.43(a), schedule all pipe lining work to ensure all Service Line Connections to the lined host pipe are reconnected and complete by 6:00 p.m. On installations with more than 1O active service connections requiring excavation or installations with multiple services crossing a roadway, install the liner and begin service line reconnections no later than 10:00 a.m. No liner with service line connections shall be started after 2:00 p.m. unless approved by the Engineer.

The Contractor shall be responsible for correcting and restoring, without delay, all missed or faulty reconnections, as well as for all property damaged resulting from a wastewater service line back-up. In

addition, the Contractor is responsible for any damages and costs incurred by the Agency due to the Contractor not providing an immediate response to a service line back-up.

Finishing, Cleaning Up, and Testing

00410.70 General - After completing each manhole to manhole section and before connecting service lines, flush and clean all parts of the system by removing all debris from the pipe. If the tested section is acceptable, reconnect all service lines.

00410.71 Testing - Conduct pipe testing according to 00445.72 and 00445.73.

00410.72 Post-Construction Video Inspection -After completing each manhole to manhole section of pipe liner installation, service reconnections, finish work, and final cleaning, perform post-construction video inspections according to Section 00415.

00410.73 Repairs - Perform repairs according to 00415.70(c).

00410.74 Warranty Video Inspection - The Engineer will perform the warranty video inspection during the warranty period at a time of high ground water conditions. All defects will be recorded on a written report and given to the Contractor. Repair all defects as directed and according to 00170.85. The video inspection conducted during high ground water conditions and subsequent repairs do not provide for early termination of the warranty period.

SECTION 00412 - CURED-IN-PLACE PIPE LINING THERMO CURE

Replace this section in its entirety with the following:

Section 00412 - Cured-in-Place Pipe Lining

Description

00412.00 Scope - This work consists of rehabilitating existing pipes by furnishing and installing pipe liners by cured-in-place pipe (CIPP) lining methods as shown.

00412.01 Submittals - In addition of the submittals described in 00410.03, submit the following 10 calendar days before the preconstruction conference:

- Certification by the lining system manufacturer that the installer is licensed and certified as competent to perform the work.
- Documentation showing the installer meets the qualifications listed in 00412.30, and a list of the key qualified personnel who are assigned to work on this project.
- Certification that manufacturing processes operate under a quality management system according to recognized industry standards.
- Certification of test results confirming that the CIPP liner system meets the minimum chemical resistance requirements according to ASTM F 1216 and ASTM F 1743.

- Catalog data, and manufacturer's technical data showing complete information on material composition, physical properties, and dimensions of system components of the tube and resin system. Include manufacturer's recommendation for handling, storage, insertion, curing, trimming, finishing, and repair of damaged liner.

- Calculations for the volume of resin to be used for each segment and detailed description of the wet-out process. Include tube and resin manufacturers wet out recommendations including the roller gap, material feed speed and vacuum requirements for each liner size and thickness.

- End seal material to be used, and method of installation. If a grout sealing method is proposed or suggested, provide certification from the grout manufacturer or supplier that the grout material for sealing structures and service laterals is compatible with the proposed resin and liner system and is suitable for use in aqueous environments.

- Sampling and testing plan for physical properties according to ASTM F 1216 and ASTM F 1743, including name and location of laboratory performing testing on installed liner system. Provide certification that each test shall be performed by a laboratory with appropriate accreditation for the specific test to be performed.

- Stamped design of the proposed CIPP liner system according to 00150.35 and 00412.02.

Upon liner system delivery, submit wet-out logs documenting resin volumes used.

00412.02 Design Parameters - Follow the design considerations of ASTM **F** 1216 and meet the following:

Follow the design considerations of ASTM **F** 1216 and meet the following:

Condition	**Parameter**
Service Life.....	Minimum 50-year life
Pipe Conditions.....	Fully deteriorated
Load Conditions:	
Soil.....	Pipe depth as indicated on plans
Traffic.....	H20 Highway load
Groundwater Elevation	5 ft. above pipe invert
Design Thickness.....	Calculate and express this thickness as the absolute minimum cured finished thickness that will be acceptable (only 6” pipe to allow for 4.5mm nominal tubing to be installed as long as the post cure thickness is close to original and meets all other performance requirements), (Minimum installed thickness for 8", 10" and 12" liners allowed is 0.236 inches (6mm), (Minimum installed thickness for 18" liners allowed is 0.472 inches (12mm), (Minimum installed thickness for 24" liners allowed is 0.591 inches (15mm)
Pipe Ovality……	2%
Soil Density……	120 lbs. /CF
Modulus of Soil Reaction...	1000 psi
Enhancement Factor…….	7.0
Short-term Flexural:	
Strength.....	4,500 psi minimum
Modulus of Elasticity.	250,000 psi minimum

Long-term Flexural:
Modulus of Elasticity … 50% of initial (ASTM D 790)
Strength……. 50% of initial (ASTM D 790)
Maximum Deflection…… 5%
Minimum Factor of Safety. 2.0

Materials

00412.10 Tube - Furnish tubing that consists of absorbent non-woven felt fabric meeting the requirements of ASTM **F** 1216, Section 5.1 and exhibits the following characteristics:

- A smooth, impermeable, bonded coating on the inside of the finished pipe.
- Sewn or bonded seams, stronger than non-seamed material, as recommended by the tube manufacturer.
- No allowable delamination in the cured GIPP.

Verify pipe lengths and pipe diameters before ordering tubing.

00412.11 Resin - Furnish resins meeting the requirements of ASTM **F** 1216, Section 5.2, or ASTM **F** 1743, Section 5.2.3. Comply with the structural requirements specified for the installed liner system. Furnish thermosetting polyester, vinylester, or epoxy resin and a catalyst system compatible with the installation process and is able to cure in the presence or absence of water. Color the resin with a pigment compatible with the resin system.

00412.12 Liner Properties - Furnish liners that have the minimum physical properties stated in ASTM **F** 1216, ASTM **F** 1743 and ASTM D 2990, and are also resistant to chemical properties and flow characteristics typically found in municipal sanitary sewer flows. Fabricate the liner to a size that when cured, will tightly fit the pipe being rehabilitated. The finished liner system shall be homogeneous across the wall thickness containing no intermediate or encapsulated elastomeric layers.

Characteristic	**Test Method**	**EpoxyNinylester**	**Polyester Resin**
Initial Flexural Strength	ASTM D 790	5,000 psi	4,500 psi
Initial Flexural Modulus of Elasticity	ASTM D 790	400,000 psi	250,000 psi (min)

00412.13 Liner End Seal - Furnish **LMK Insignia End Seal Sleeves** or approved equal for all liner ends.

The end seal must remain in place throughout liner installation. If the end seal is washed away or diluted by flow through the host pipe, it must be reapplied before installation is allowed to proceed.

Labor

00412.30 Personnel Qualifications - Provide installers who:

- Are licensed and certified by the manufacturer of the CIPP product system to be used on the Project.
- Have at least 3 years of active experience in the installation of ClPP.
- Have installed at least 50,000 feet of CIPP in similar conditions.

Construction

00412.40 General - Handle and store all liner material to ensure that the material is not torn, cut, exposed to direct sunlight or otherwise damaged. Before installing the liner, verify its condition with the Engineer. If any part of the liner material becomes torn, cut, or damaged before or during insertion, repair or replace it at no additional cost to the Agency before proceeding further.

The liner shall be continuous and seamless. Before the pipe lining work, field verify all host pipes scheduled for rehabilitation for length and diameter. The minimum length of the liner shall be the distance from the upstream manhole to the terminating downstream manhole.

00412.41 Installation - Install VIPP according to ASTM **F** 1216 Section 7, ASTM **F** 1743 Section 6, and the manufacturer's recommendations.

(a) General - Liners may be installed in continuous runs through manholes where there are two or more continuous host pipe segments requiring lining.

Provide temporary downstream dams or filtration measures in the pipeline to catch excess resin and construction debris.

Do not allow the temperature of water discharged from processing liners to exceed the level allowed by State or local requirements.
After the first two-line segments are completed and at least 6 service line connections have been installed and completely backfilled, stop pipe lining work and perform a video inspection for review by the Engineer. Perform the video inspection according to 00415 to verify the finished pipe liner extends from manhole to manhole continuously over the entire length, in a seamless, tight fitting, watertight, wrinkle-free surface contouring to the host pipe. Only after successfully completing testing and video inspection will the liner be approved for service line work. If any liner or connection defect is found, repair or replace it immediately by a method approved by the Engineer. If excessive defects are identified, the Engineer will require another video inspection after the next two-line segments are completed as described in this paragraph.

When the Contractor has successfully demonstrated their installation procedures, they may proceed with the pipe lining work. The Engineer may require the Contractor to perform the final video inspections on any installed segments before all segments are completed.

Immediately following each liner installation the Contractor shall make a video inspection from manhole to manhole of the liner with the inspector present, or in the inspector's absence, a digital copy of the video inspection, with identification of the segment by mainline identification numbers written on it, must be made for review and submitted no later than 1 Working Day after liner installation. No log of this video inspection is required. This video inspection is not for the purpose of "Mainline Video Inspection".

(b) Pipe Liner End Seal - Install an end seal when reconnecting to the rehabilitated host pipe.

00412.42 Service Line Reconnection - Reconnect all service lines according to 00410.49 and this section. If a permanent connection cannot be made by the end of the workday, install an approved temporary service connection.

(a) Internal Service Reinstatement • As shown or directed perform an internal service reinstatement. Reinstate active service lines using an internal cutter. Provide a primary and back-up robotic cutting device.

Before cutting any internal reinstatements, locate the liner dimples at the service connections. Verify that the dimple locations correspond to the distances measured to the service lines. The internally reinstated

lateral must be restored to at least 95% but not more than 100% of the original size and shape of the service opening. Make each connection free from burrs or projections, and with a smooth and crack-free edge.

Core the CIPP at the service line from inside the CIPP. Use video inspection equipment according to 00415 and a robotic cutting device. Match the original service line invert with the new opening. Remove all rough edges and burrs. Holes in the liner due to errors in determining the location of a service connection or oversized holes at service locations will be considered liner defects.

(b) Limited Access Service Reconnection • A service line reconnection is considered to have limited access when it is impractical for typical heavy equipment to reach the site. Where construction access is limited, use an alternate excavation method to provide the service line connection. Hand excavate or use small excavating equipment.

00412.43 Structure Connections

(a) Manhole Drops - Where a lined segment with an external drop manhole has less than two vertical feet between the inlet and outlet flow lines, abandon the external drop in place. Seal the flow line stub using non-shrink grout and construct a concrete slide to direct flow smoothly into the channel and minimize turbulence and splatter onto the base.

Where exterior drops are greater than 2 vertical feet, reinstate the opening of the drop from inside the liner pipe using robotic cutting equipment as described in section 00412.42(e).

(b) Miscellaneous Manhole Work - All liner pipes entering a manhole shall be cut square at the invert. Liner pipe shall extend into the manhole a minimum of 1 inch and maximum of 2 inches in length.

After liner installation is complete modify manhole channels using non-shrink grout to provide a smooth and uninterrupted flow throughout the channel base and over the ends of the new pipe liners. Perform bypass pumping according to 00490.40. Prepare all surfaces to which the grout is applied by cleaning and applying a compatible bonding agent approved by the manufacturer. Allow the grout to set according to the manufacturer's recommendation before reintroducing flow to the channel.

Finishing, Cleaning Up, and Testing

00412.70 General - Remove temporary dams or filtration measures after work is complete and pipe is clean and restored.

00412.71 Material Sampling and Testing - Obtain samples and perform material testing according to ASTM F 1216 and ASTM F 1743. Perform one physical properties test per 1,000 feet installed, or as specified.

00412.72 Repairs - Before making repairs, provide the CIPP liner system manufacturer's recommendations for liner repairs, subject to approval. Repair or replace CIPP liners that have:

- Wrinkles, fins or other discontinuities in the lower one-third of the pipe that are perpendicular to the flow and exceed 1/2 inches in height or are greater than 3 percent of the host pipe inside diameter.
- Wrinkles, fins or other discontinuities in the upper two-thirds of the pipe that are perpendicular to the flow and are greater in height than 5 percent of the host pipe inside diameter.
- Blisters or dry spots present.
- Leakage through the liner in excess of ASTM F 1216 and ASTM F 1743 standards.
- Separation of the liner from the host pipe.

- Delamination of CIPP layers.

00412.75 Warranty An 18-month Contractor warranty, according to 00170.BS(b-2), is required for the CIPP work.

Make all repairs and replace the liner or portions of the liner within 6 months of the Agency's written notification of failure of an item.

Furnish materials and use procedures to repair and replace failed liners that meet the specifications in effect at the time of original installation, or if no longer available, use current CIPP specifications.

Measurement

00412.80 Measurement - The quantities of installed CIPP liners, of the various kinds, types, and sizes, will be measured on the length basis. The length will be measured, with no deduction for structures or fittings, along the pipe flow line from center to center of manholes, inlets, structures, special sections, or the ends of pipe, whichever is applicable.
The quantities of service line reconnections, internal service reinstatements and service line connections will be measured on the unit basis, regardless of size.

The quantities of approved limited access excavations will be measured on the unit basis, regardless of depth. This item is measured at locations of service line reconnections and saddle connections and is in addition to that work if applicable.

Payment

00412.90 Payment - The accepted quantities of work performed under this Section will be paid for at the Contract unit price, per unit of measurement, for the following items:

Pay Item	Unit of Measurement
(a) CIPP Liner, ____ Inch	Foot
(b) Internal Service Reinstatement	Each

In item (a), the nominal size of the host pipe will be inserted in the blank.

Item (a) includes removal of service connections protruding into the host pipe. Removal of protruding connections is considered to be incidental to this work and no separate or additional payment will be made.

Payment will be payment in full for furnishing and placing all materials, and for furnishing all equipment, labor, and incidentals necessary to complete the work as specified.

SECTION 00415 - VIDEO PIPE INSPECTION

Replace this section in its entirety with the following:

Section 00415 · Video Pipe Inspection

Description

00415.00 Scope - This work consists of cleaning 6 inch to 36 inch in diameter pipes and inspecting them using video and related electronic equipment and making a recorded narrative and written report of the findings.

Equipment

00415.20 Mainline Inspection Equipment - Use the following equipment unless otherwise approved.

(a) Camera and Lighting - Use a digital color video camera equipped with an illumination device that provides clear and sharp images with all pipe sizes and material types. The camera and lighting are capable of operating in 100% humidity conditions with ability to pan and tilt 275° and rotate 360°.

It is the intent of the Agency by these specifications that the equipment used provide a bright, distinct picture of the inside of the pipe. The camera must record directly to a digital storage device. If the picture quality is inadequate, the Agency may not accept the pipe installation and may require additional video inspections at no additional cost.

(b) Footage Meter - Provide on the recorded video a footage meter displaying footage in tenths of feet and indicating the camera's position from its starting point. Calibrate the footage meter to be accurate within 2 feet per 1,000 feet.

(d) Drive Device - Use tractors, manual winches, power winches, video cable, powered rewinds, self-propulsion, or other devices that do not obstruct the camera view. Maintain the camera along the approximate center vertical axis of the pipe at all times.

00415.21 Service Line Lateral Inspection Equipment - Use the following equipment unless otherwise approved.

(a) Push Camera - Provide a portable camera system that can be manually inserted into service line laterals. The imaging capabilities and illumination requirements for the push camera system are similar to 00415.20(a). Provide a hand-held push camera on site at all times.

(b) Lateral Launch Camera - Provide a camera component as part of the mainline video inspection system that can be launched into a service line lateral connection while inspecting mainline. The lateral launch camera is capable of inspecting the length of the lateral from the mainline connection to beyond the edge of the right-of-way. The imaging capabilities and lighting requirements for the lateral launch camera system are similar to 00415.20(a).

(c) Electronic Location Device - Provide a radio transmitter that can be attached to the video camera system that can be detected from the surface to determine the horizontal and vertical position of the pipes below ground. This locating equipment shall be capable of locating the transmitter to within 2 feet horizontally and 1 foot vertically to a depth of at least 10 feet. Provide a locator device on site at all times.

Construction

00415.40 General Video Inspection:

(a) Notice and Access - Notify the Engineer a minimum of 48 hours before beginning cleaning or video inspection. Allow access to the Engineer at all times to observe the video monitor and all other operations.

{b) Cleaning - Install a screen to catch debris at the downstream end of the pipe run. Clean the pipe of obstructions that will impede video inspection. Avoid causing damage to pipe while completing the cleaning operation. Remove and dispose of solid debris according to 00290.20.

(c) Inspection - After cleaning, pre-charge the pipe with clean water to assist in locating bellies and deformations of the pipe. Control the flow into the segment to be inspected. If required, perform bypass pumping according to Section 00490. Perform continuous video inspection while pipe remains clean. Video inspect pipes one segment at a time. Do not move the camera at a speed greater than 30 feet per minute. Move the camera through the line in either direction stopping, panning or tilting as necessary to permit documentation of the pipe's condition including the location of all lateral connections, additional connections to the mainline and other characteristics. Stop and inspect joints as directed in the Special Provisions.

When standing water is found during video inspection, halt the forward progress of the camera for a minimum of three seconds at each three-foot increment through the limits of the standing water and relax the pulling cable if necessary, so that the depth of the water may be measured from the mandrel water depth gauge.

When standing water is found during video inspection of rigid pipe, re-inspect using a mandrel with water depth gauge to determine water depth. The mandrel shall comply with section 00445.73.

If, during the inspection operation, the camera will not pass through the entire segment, set up equipment so that the inspection can be performed from the opposite access point back to the obstruction.

(d) Narrative and Extent of Inspection - Provide a verbal narrative description on each video inspection recording. Include the following minimum information in the narrative: the beginning and the end of the video, the site location or street address, access point identifications, the total footage of the pipe inspected, the company name, the operator's name and the date, time and weather conditions.

Make note of all defective joints, each lateral connection, and other conditions within the pipe.

(e) Footage Metering - Begin all video inspection with the footage meter set to zero and begin video inspection from the middle of the access point. Provide accurate on-screen distance measurements in the video recording. Ensure that the footage information on the recorded video corresponds to the footage references in the written inspection report. Video recording footage which misrepresents actual footage by more than 3 feet will be rejected. Perform another video inspection at no additional cost to the Agency.

(f) Recording Format and Labeling - Record the video inspection using an approved file format.

Furnish recordings on an approved media storage device including a text file to indicate the project number and name, date of inspection, pipe segment number, Contractor's name and whether it is a pre-construction or post-construction video, filenames, and description of file contents.

(g) Continuity, Image and Audio - Record video continuously, without editing or starts and stops, in color from the beginning to the end of each pipe segment. Ensure that the pipe image is free of visual distortions and appears level and centered in the pipe being inspected. Ensure that the audio portion of the composite video recording is sufficiently free from electrical interference and background noise to provide complete clarity of the narrative description.

(h) Video Inspection Recording and Written Inspection Report - The Agency will supply a Video Report Form which shall be used for the written report. Furnish one copy of all pre-construction and post-construction video inspection reports and video recordings within three days after completing the inspections or as specified. All accepted video recordings, inspection reports, and any related information become the property of the Agency.

Include in the written report the location in relation to an adjacent access point for each feature observed during inspection. Include other points of significance including locations of building pipes, unusual conditions, roots, location and depth of pipe sags, all connections, pipe material and size, and broken pipe. Ensure that the footage information on the recorded video corresponds to the footage references in the written inspection report.

SECTION 00440 - COMMERCIAL GRADE CONCRETE

Comply with Section 00440 of the Standard Specifications modified as follows:

00440.40(e) Curing - Replace this subsection, except for the subsection number and title, with the following:

Cure CGC for a minimum of 7 Calendar Days by one of the following methods:

Cover with wet burlap, canvas, Sand, or other acceptable Material, and keep moist.

Apply curing compounds at a rate of not less than 1 gallon per 150 square feet. Do not use on surfaces that come into contact with adjacent pours and avoid overspray on exposed reinforcement. Use curing compounds according to the following:

Table 00440-1

Section	Item	Type 1 or 1-D (Clear)	Type 2 (White-Pigmented)
00480	Drainage Curbs	*	*
00599	Slope Paving Curbs and Berm Paving	Yes	No
00759	Walks, Curb Ramps, Driveways, Surfacings, Curbs, and Islands	*	*

*Use Type 2 except when the Engineer requires Type 1 or 1-D

SECTION 00442 - CONTROLLED LOW STRENGTH MATERIALS

Comply with Section 00442 of the Standard Specifications modified as follows:

00442.14 Acceptance - Replace this subsection, except for the subsection number and title, with the following:

Acceptance will be based on the Engineer's review and approval of the documentation required by 00442.12, and visual inspection during placement.

SECTION 00445 - SANITARY, STORM, CULVERT, SIPHON, AND IRRIGATION PIPE

Comply with Section 00445 of the Standard Specifications.

SECTION 00470 - MANHOLES, CATCH BASINS, AND INLETS

Comply with Section 00470 of the Standard Specifications.

SECTION 00490 - WORK ON EXISTING SEWERS AND STRUCTURES

Comply with Section 00490 of the Standard Specifications modified as follows:

00490.10 Materials - Add the following to the end of this subsection:

Portland Cement Concrete Repair Materials……02015.20

00490.11 High Early Strength Concrete - Replace this subsection, except for the subsection number and title, with the following:

Furnish high early strength concrete meeting one of the following requirements:

Commercial Grade Concrete designed to achieve high early strength utilizing accelerating admixture from 02040.10, Type III cement from Section 02010, or rapid setting cement from Section 02011.

A Portland cement concrete repair material from 02015.20, rapid setting or very rapid setting.

SECTION 00495 - TRENCH RESURFACING

Comply with Section 00495 of the Standard Specifications.

Comply with Section 00610 of the Standard Specifications.

SECTION 00620 - COLD PLANE PAVEMENT REMOVAL

Comply with Section 00620 of the Standard Specifications.

SECTION 00640 - AGGREGATE BASE AND SHOULDERS

Comply with Section 00640 of the Standard Specifications.

SECTION 00641 - AGGREGATE SUBBASE, BASE, AND SHOULDERS

Comply with Section 00641 of the Standard Specifications

SECTION 00744 - ASPHALT CONCRETE PAVEMENT

Comply with Section 00744 of the Standard Specifications modified as follows:

00744.11(a) Asphalt Cement - Add the following to the end of this subsection:

Provide _PG 70-22_ grade asphalt cement for this Project.

Add the following subsection:

00744.51 Opening Sections to Traffic - Schedule work so that, during the same shift, the surfaces being paved are paved full width and length through the wearing Course before opening to traffic.

SECTION 00748 - ASPHALT CONCRETE PAVEMENT REPAIR

Comply with Section 00748 of the Standard Specifications modified as follows:

00748.10 Materials – Replace the Material that begins "Aggregate Base…" with the following Material:

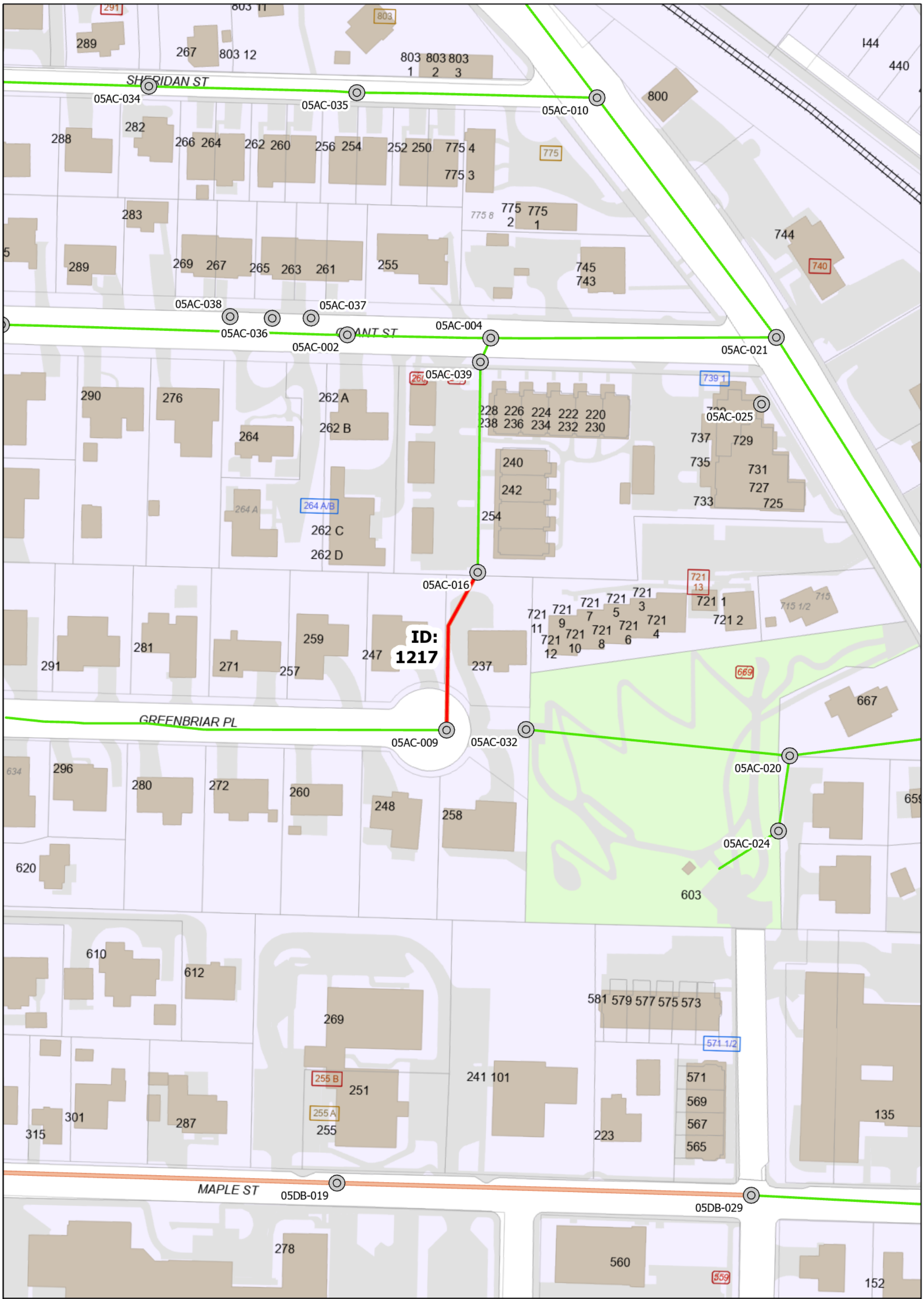
Aggregate Base 02630.10

PIPE SEGMENT INDEX & MAPS

2024-28 Wastewater Collections and Storm Drainage CIPP Project - Pipe Index								
ID	Route	Length	DS_MH	Type	Notes	Conn/Active	Conn/CAP	Holes
1217	GREENBRIAR PL	159	05AC-016	Concrete, 6"	easement	3	0	1
1393	COVENTRY	136	04BB-020	Concrete, 6"	easement	1	0	0
1453	W NEVADA ST	94	04BC-033	Concrete, 12"	easement	0	0	0
1454	W NEVADA ST	60	04BC-034	Concrete, 12"	easement	1	0	0
1455	W NEVADA ST	117	04BB-044	Concrete, 12"	easement	1	0	0
1458	W NEVADA ST	58		Concrete, 12"	easement	0	0	0
1461	MICHELLE AV	268	04BB-028	Concrete, 12"	easement	3	0	0
1551	RANDY ST	149	04BC-032	Concrete, 12"		0	0	0
1552	CAMBRIDGE ST	139	04BC-035	Concrete, 12"		0	0	0
1553	CAMBRIDGE ST	132	04BC-012	Concrete, 12"		2	0	0
1627	MAPLE ST	362	05DB-019	Concrete, 6"		6	0	
1646	MAPLE ST	399	05DB-029	Concrete, 6"	Small hole/void	10	0	6
2196	OAK ST	175	04CD-028	Concrete, 12"		0	0	0
2197	OAK ST	118	04CC-029	Concrete, 12"	under Ashland creek	0	0	0
2198	OAK ST	154	04CC-030	Concrete, 12"		0	2	0
2223	Crispin	185	04CD-034	Concrete,10"		1	0	0
2227	Crispin	395	04CD-001	Concrete,8"	DSMH is a drop MH	3	0	0
2230	PATTERSON	268	04CD-019	Concrete,10"	Small hole/void	0	0	1
2243	PATTERSON	213	04CD-021	Concrete,10"		3	0	1
2261	B ST	260	09BB-028	Concrete, 6"	Knock Bike Shop -Small hole/void	7	1	1
2539	FAIRVIEW ST	281	09CA-005	Clay, 6"	Small hole/void	7	7	1
2574	JENNIFER ST	126	09CD-023	Concrete, 6"	easement	1	0	0
2619	ASHLAND ST	251	09CD-036	Concrete, 6"	Small hole/void	4	0	1
2777	PATTERSON	20	04DC-041	Concrete,10"		0	0	0
3104	SISKIYOU BL	399	09DB-020	Clay, 8"		11	11	0
3115	E MAIN ST	334	09AD-005	Concrete, 8"	Small hole/void	5	0	4
3323	SISKIYOU BL	327	09DB-021	Clay, 8"		9	3	0
3397	SISKIYOU BL	388	09DB-021	Clay, 8"	Small hole/void	3	12	1
3441	SISKIYOU BL	441	09DB-025	Clay, 8"		7	17	0
3454	SISKIYOU BL	414	09DA-001	Clay, 8"		5	7	0
3475	SISKIYOU BL	521	09DA-015	Clay, 8"		7	11	0
3576	SISKIYOU BL	291	10CC-021	Clay, 8"		3	11	0
3864	PALMER RD	280	15BB-002	Clay, 6"		2	0	0
4332	STARLITE	138	15CA-024	Concrete,6"		1	0	0
4333	ONEIDA	98	15CA-013	Concrete,6"		1	0	0
4334	ONEIDA	123	15CA-012	Concrete,6"		2	0	0
5160	SISKIYOU BL	451	10CC-018	Clay, 8"		3	16	0
5268	SISKIYOU BL	377	09DA-003	Clay, 8"		8	5	0
5280	SISKIYOU BL	69	09DA-017	Clay, 8"		0	1	0
7687	PATTERSON	19	04CD-024	Concrete,10"		0	0	0
5230	Hersey	335	Storm	Metal, 36"		0	0	0

COMBINED TOTAL	9524

TOTAL SERVICE CONNECTIONS	120



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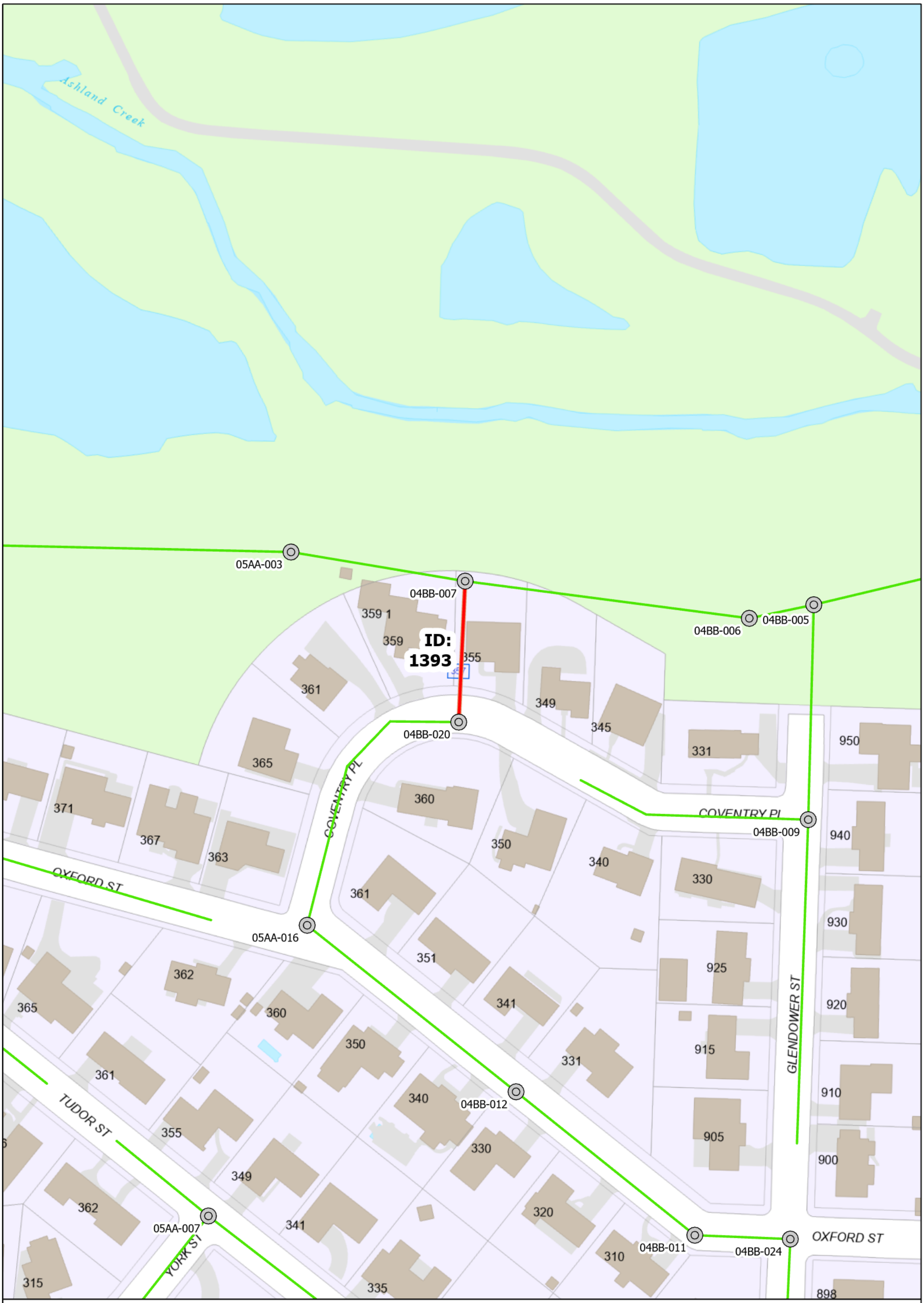
To: 05AC-016
Length: 158.4 Ft
Page Number: 1

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet


Ashland Creek
05AA-003
04BB-007
359 1
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ID:
1393
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361
04BB-020
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04BB-006
04BB-005
331
950
365
371
367
363
COVENTRY PL
360
350
340
330
04BB-009
940
OXFORD ST
361
05AA-016
351
925
930
362
341
920
915
910
905
900
340
04BB-012
330
355
349
362
05AA-007
YORK ST
341
320
04BB-011
04BB-024
OXFORD ST
310
315
335
898
ID: 1393
Size: 6"
Type: Concrete Segments (Unbolted)
From: 04BB-020
To: 04BB-007
Length: 135.06 Ft
Page Number: 2
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ssGravityMain
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Pipe To be Lined
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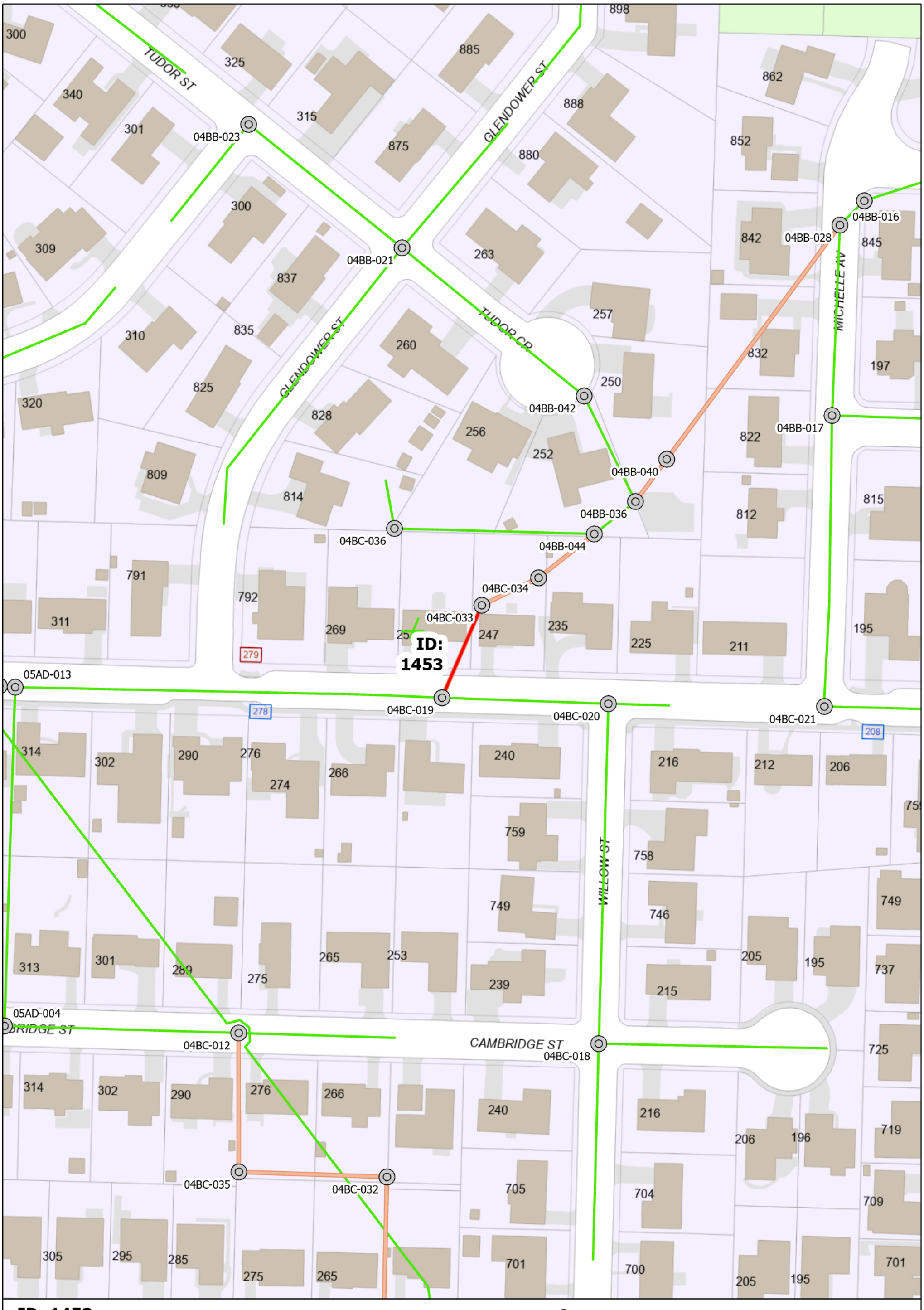
125
250 Feet
Better Together


TUDOR ST
GLENDOWER ST
TUDOR CR
MICHELLE AV
WILLOW ST
CAMBRIDGE ST
04BB-023
04BB-021
04BB-016
04BB-028
04BB-042
04BB-017
04BB-040
04BB-036
04BB-044
04BC-036
04BC-034
04BC-033
04BC-019
04BC-020
04BC-021
04BC-012
04BC-018
04BC-035
04BC-032
05AD-013
05AD-004
ID: 1453
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278
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842
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216
212
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759
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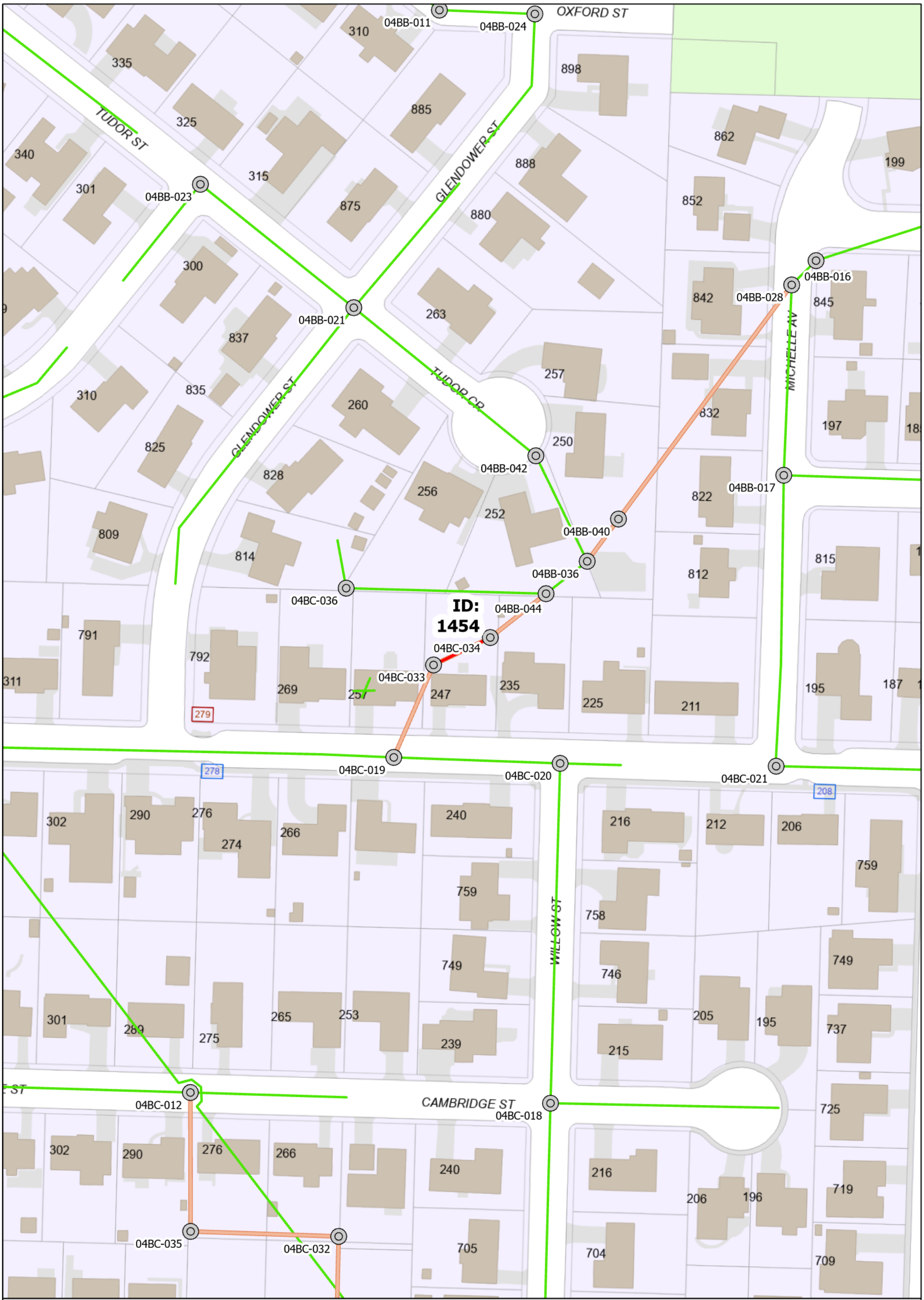
275
265
253
239
215
205
195
737
314
302
290
276
266
240
216
206
196
719
705
704
709
305
295
285
275
265
701
700
205
195
701
ID:
1453
Size: 12"
Type: Concrete Segments (Unbolted)
From: 04BC-019
To: 04BC-033
Length: 96.4 Ft
Page Number: 3
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together


OXFORD ST
TUDOR ST
GLENDOWER ST
TUDOR CR
MICHELLE AV
WILLOW ST
CAMBRIDGE ST
04BB-011
04BB-024
04BB-023
04BB-021
04BB-016
04BB-028
04BB-042
04BB-017
04BB-040
04BB-036
04BB-044
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04BC-020
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04BC-035
04BC-032
04BC-018
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335
325
340
301
315
875
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880
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852
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842
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300
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212
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758
746
205
215
195
737
725
719
709
704
705
239
253
265
275
289
301
CAMBRIDGE ST
ID: 1454
Size: 12"
Type: Concrete Segments (Unbolted)
From: 04BC-033
To: 04BC-034
Length: 60.36 Ft
Page Number: 4
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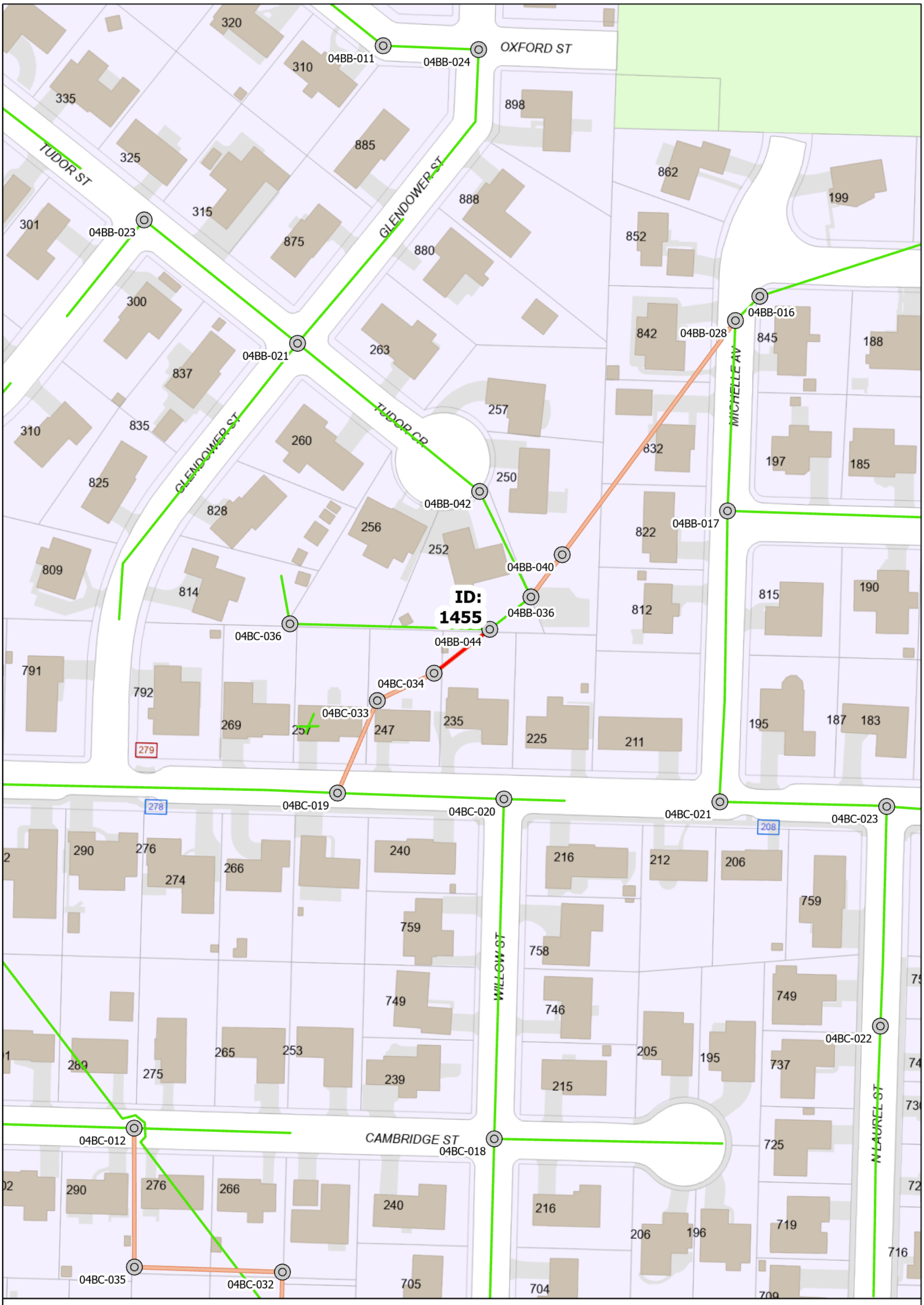
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together


OXFORD ST
TUDOR ST
GLENDOWER ST
TUDOR CR
MICHELLE AV
WILLOW ST
N LAUREL ST
CAMBRIDGE ST
04BB-011
04BB-024
04BB-023
04BB-021
04BB-016
04BB-028
04BB-042
04BB-017
04BB-040
04BB-036
04BB-044
04BC-036
04BC-034
04BC-033
04BC-019
04BC-020
04BC-021
04BC-023
04BC-022
04BC-018
04BC-012
04BC-035
04BC-032
ID: 1455
320
310
335
325
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898
862
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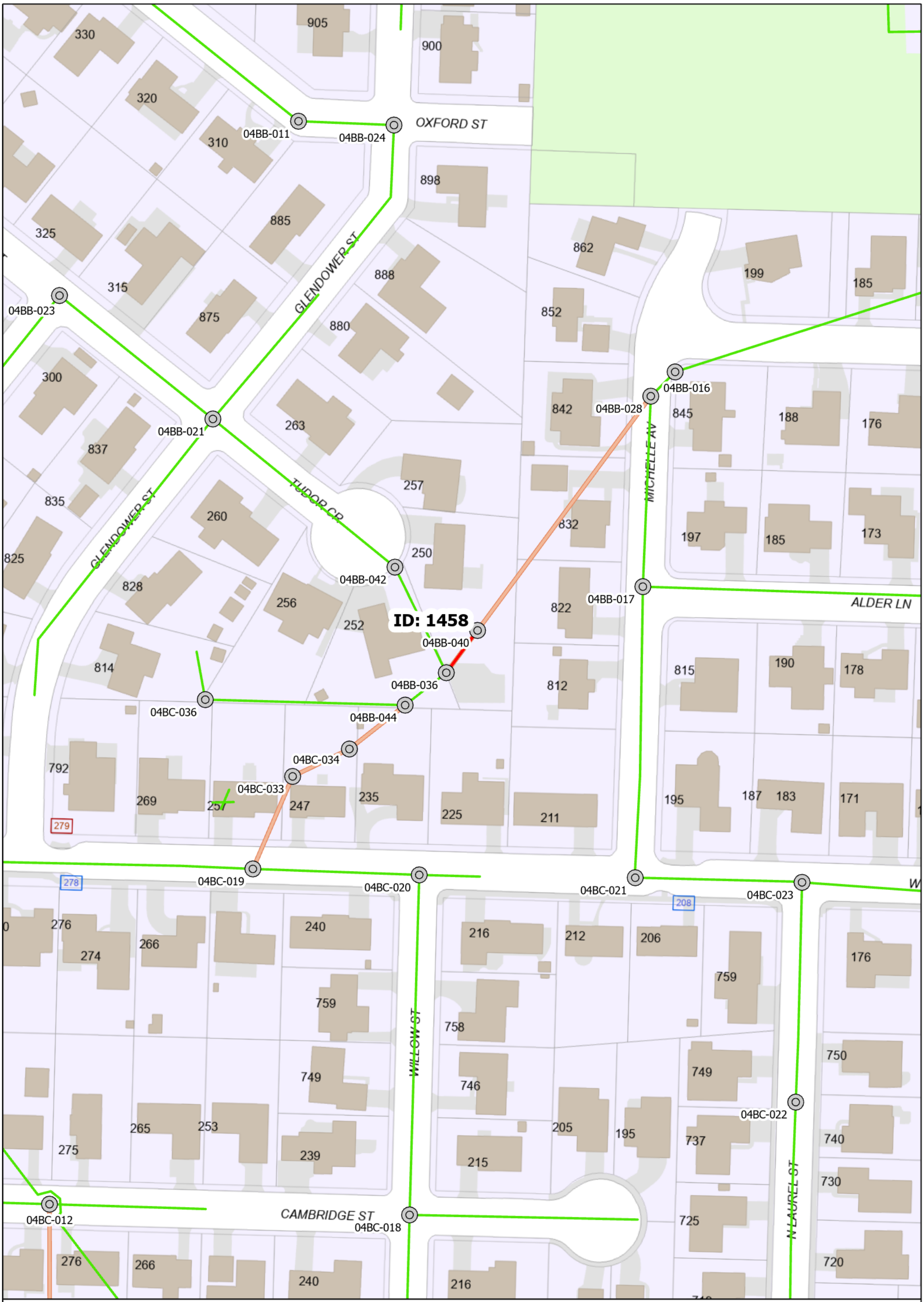
737
215
289
275
265
253
239
190
815
812
725
719
716
704
709
2
1
02
ID: 1455
Size: 12"
Type: Concrete Segments (Unbolted)
From: 04BC-034
To: 04BB-044
Length: 67.94 Ft
Page Number: 5
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together


OXFORD ST
GLENDOWER ST
TUDOR CP
MICHELLE AV E
ALDER LN
WILLOW ST
N LAUREL ST
CAMBRIDGE ST
04BB-011
04BB-024
04BB-023
04BB-021
04BB-042
04BB-040
04BB-036
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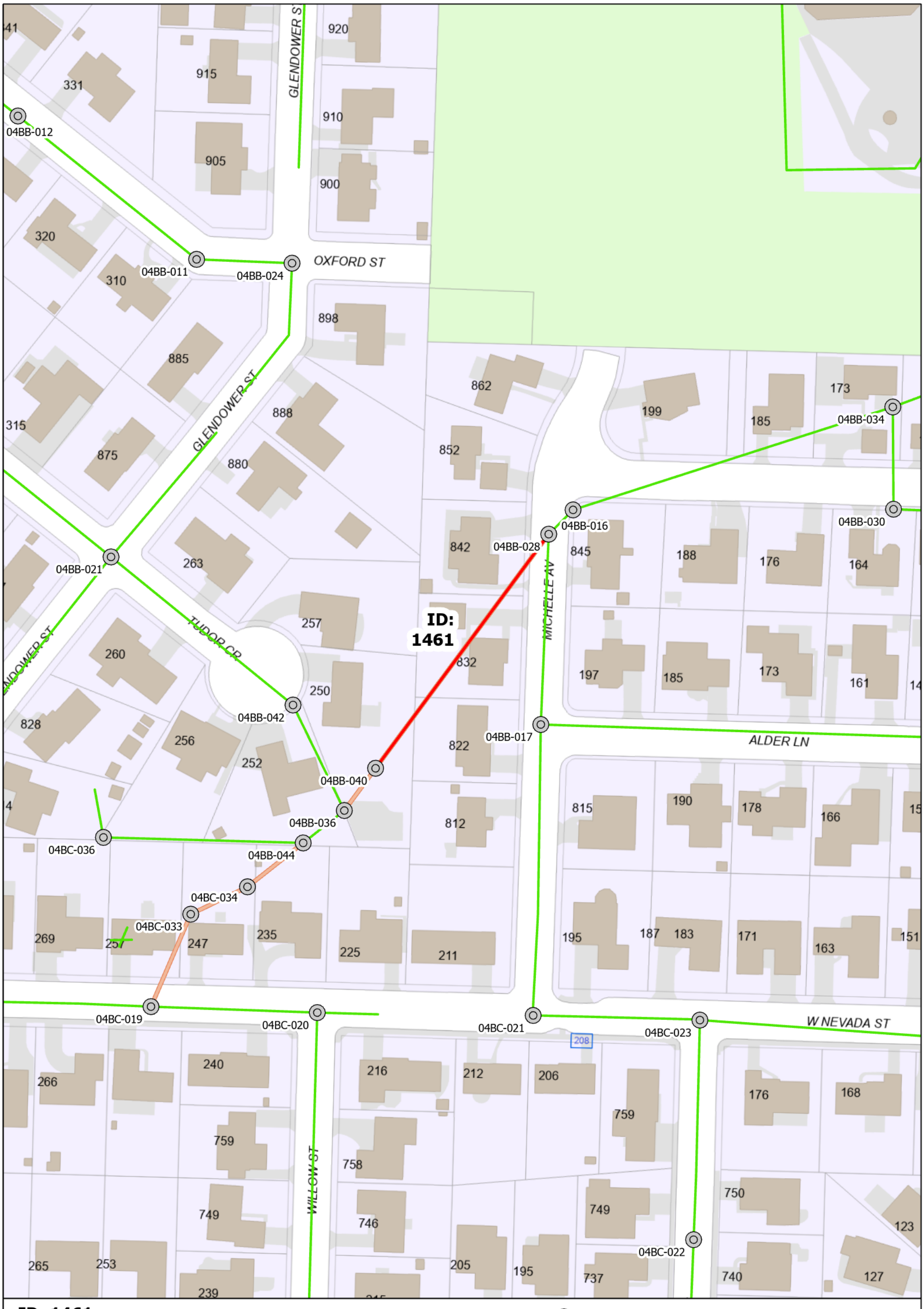
759
758
749
746
205
195
737
750
740
730
720
253
265
275
239
215
725
ID: 1458
Size: 12"
Type: Concrete Segments (Unbolted)
From: 04BB-036
To: 04BB-040
Length: 50.36 Ft
Page Number: 6
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together

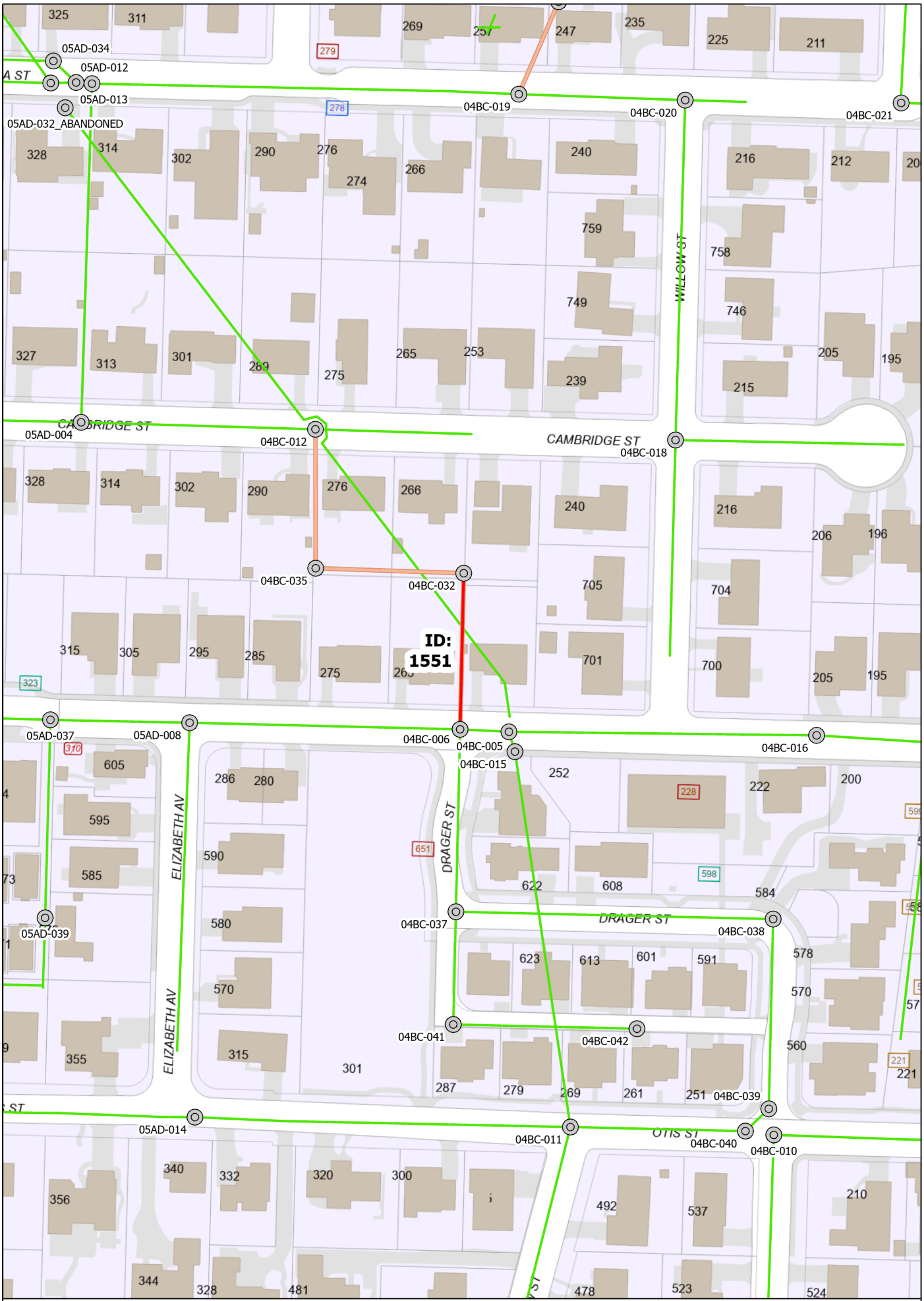


ID: 1461
Size: 12"
Type: Concrete Segments (Unbolted)
From: 04BB-040
To: 04BB-028
Length: 278.95 Ft
Page Number: 7

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet



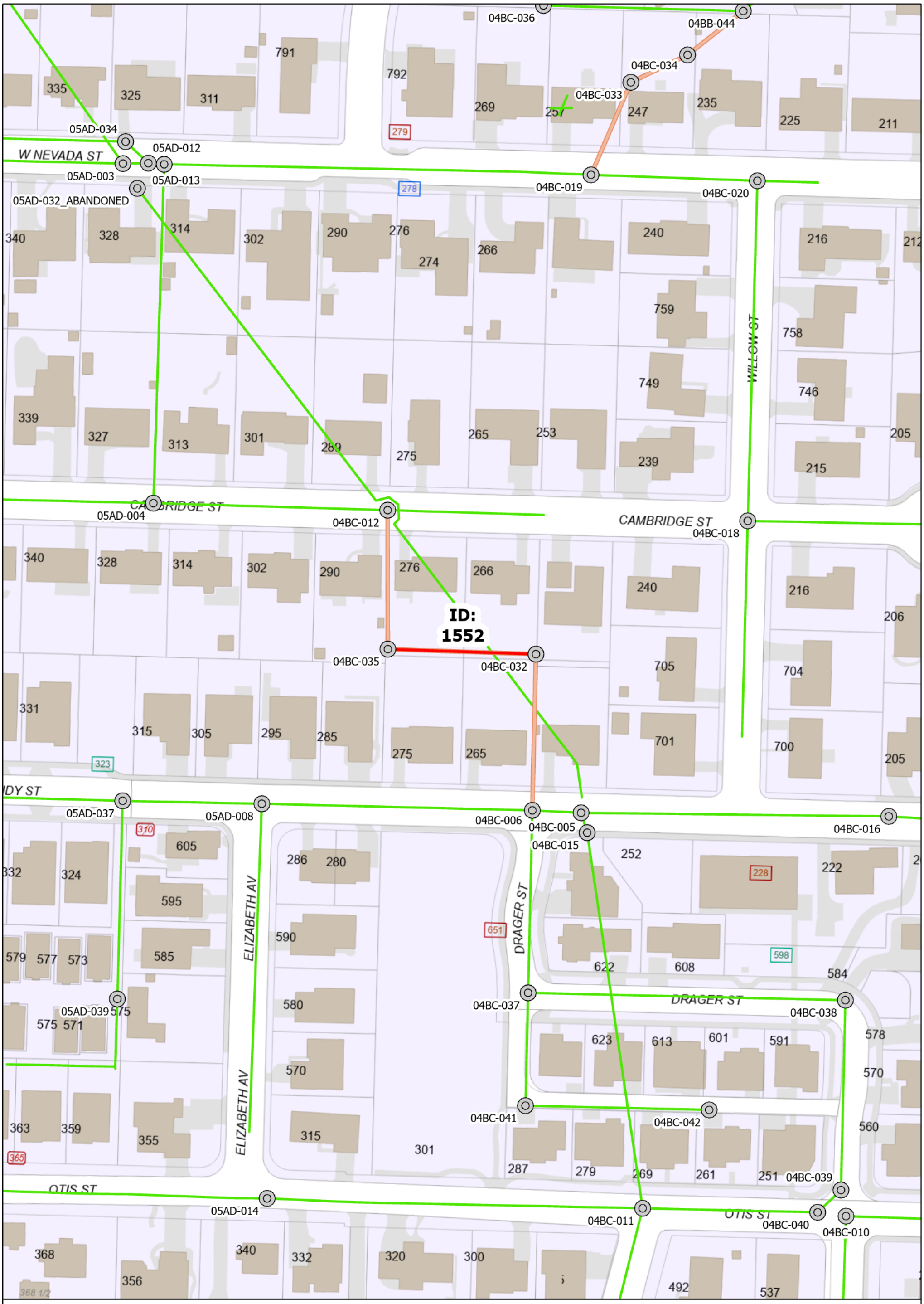
ID: 1551

Size: 12"
Type: Concrete Segments (Unbolted)
From: 04BC-006
To: 04BC-032
Length: 149.55 Ft
Page Number: 8

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet



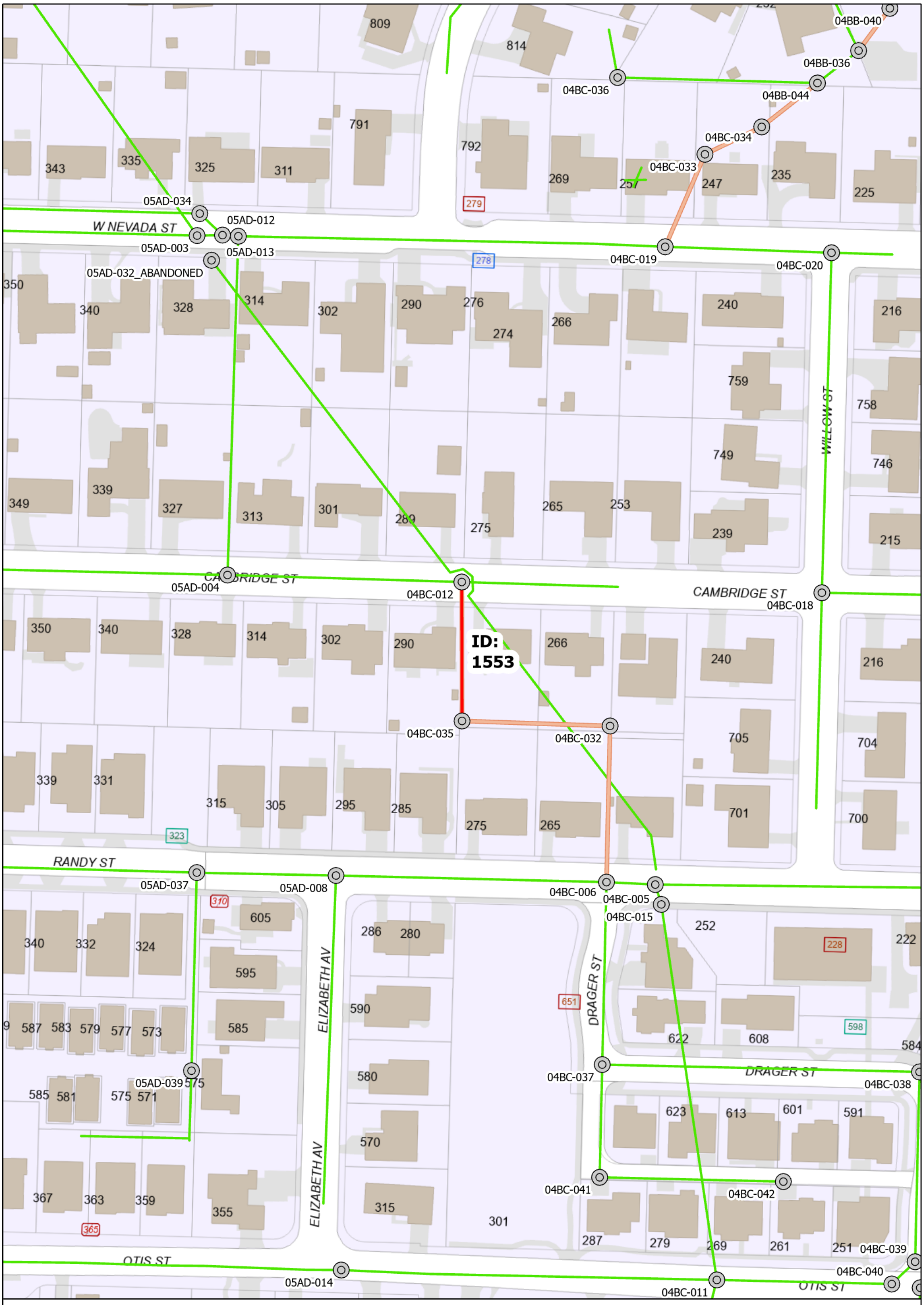
ID: 1552
Size: 6"
Type: Concrete Segments (Unbolted)
From: 04BC-032
To: 04BC-035
Length: 141.87 Ft
Page Number: 9

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet

Better Together



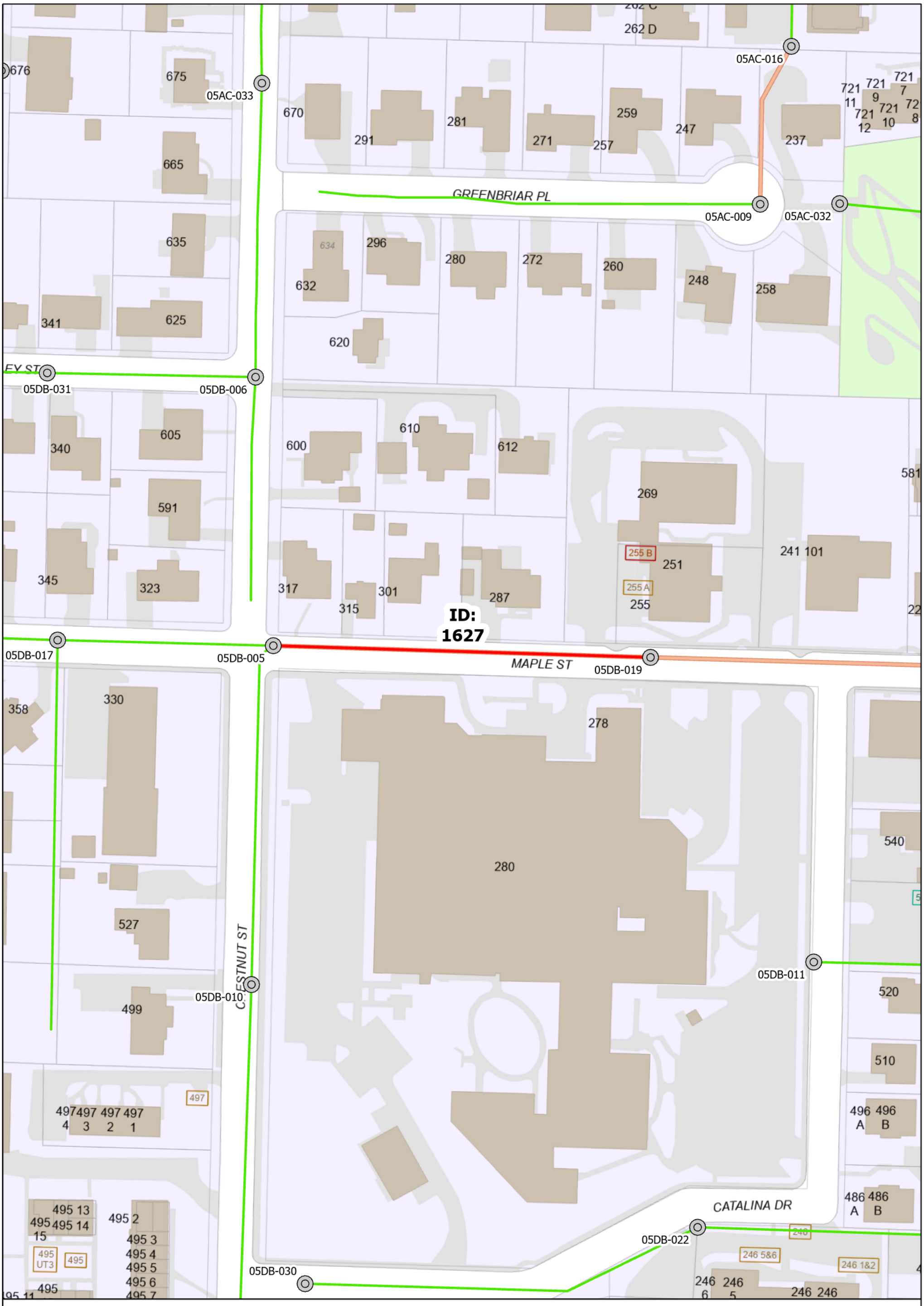
ID: 1553

Size: 12"
Type: Concrete Segments (Unbolted)
From: 04BC-035
To: 04BC-012
Length: 133.06 Ft
Page Number: 10

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

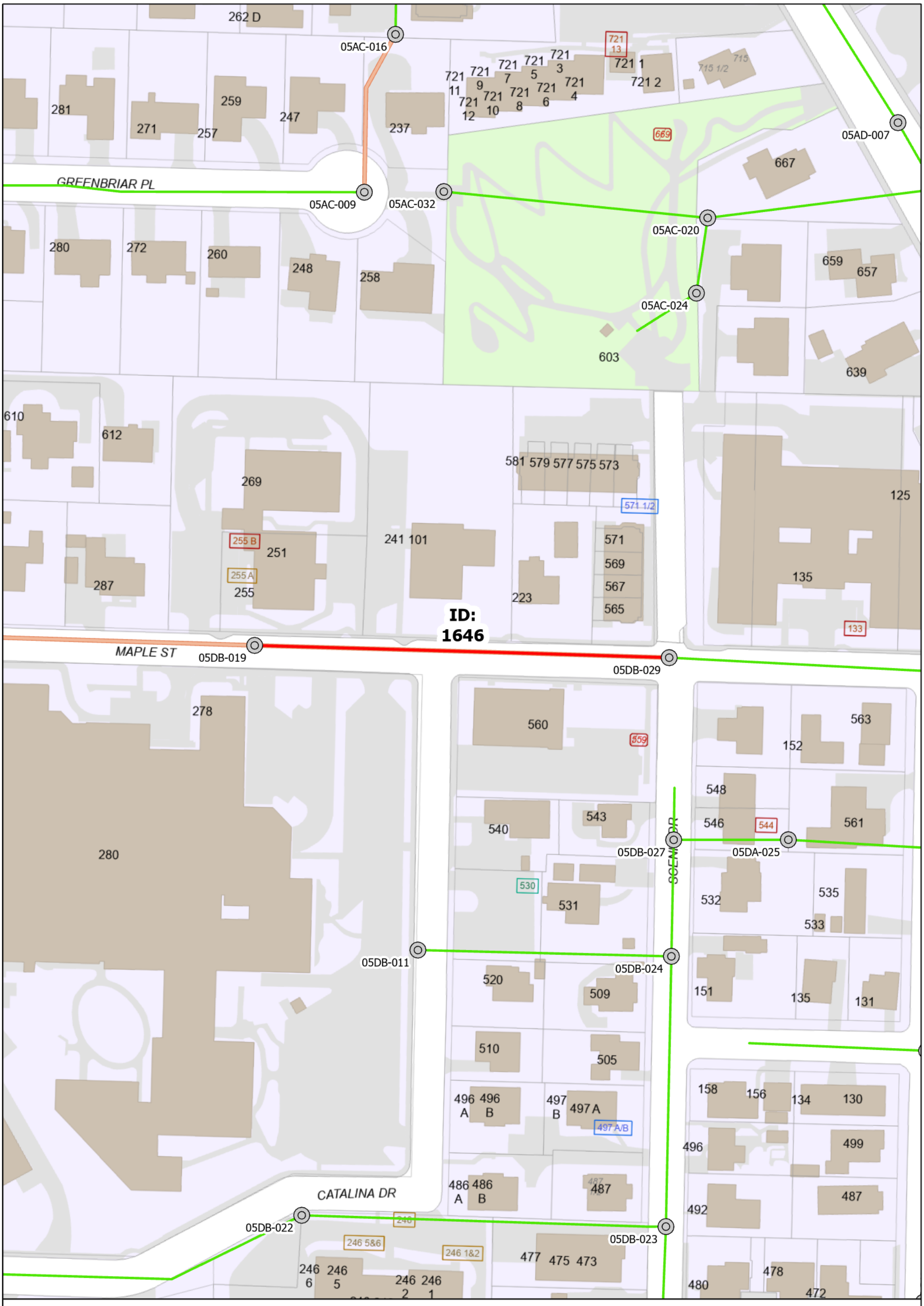
N

0 125 250 Feet



ID: 1627

Size: 6"
Type: Concrete Segments (Unbolted)
From: 05DB-005
To: 05DB-019
Length: 361.46 Ft
Page Number: 11


262 D
05AC-016
721 13
721 1
721 2
715
715 1/2
721 3
721 5
721 7
721 9
721 11
721 4
721 6
721 8
721 10
721 12
281
271
259
257
247
237
669
05AD-007
667
GREENBRIAR PL
05AC-009
05AC-032
05AC-020
280
272
260
248
258
659
657
05AC-024
603
639
610
612
269
581 579 577 575 573
571 1/2
125
255 B
251
255 A
255
241 101
571
569
567
565
287
223
135
133
ID:
1646
MAPLE ST
05DB-019
05DB-029
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544
561
05DB-027
05DA-025
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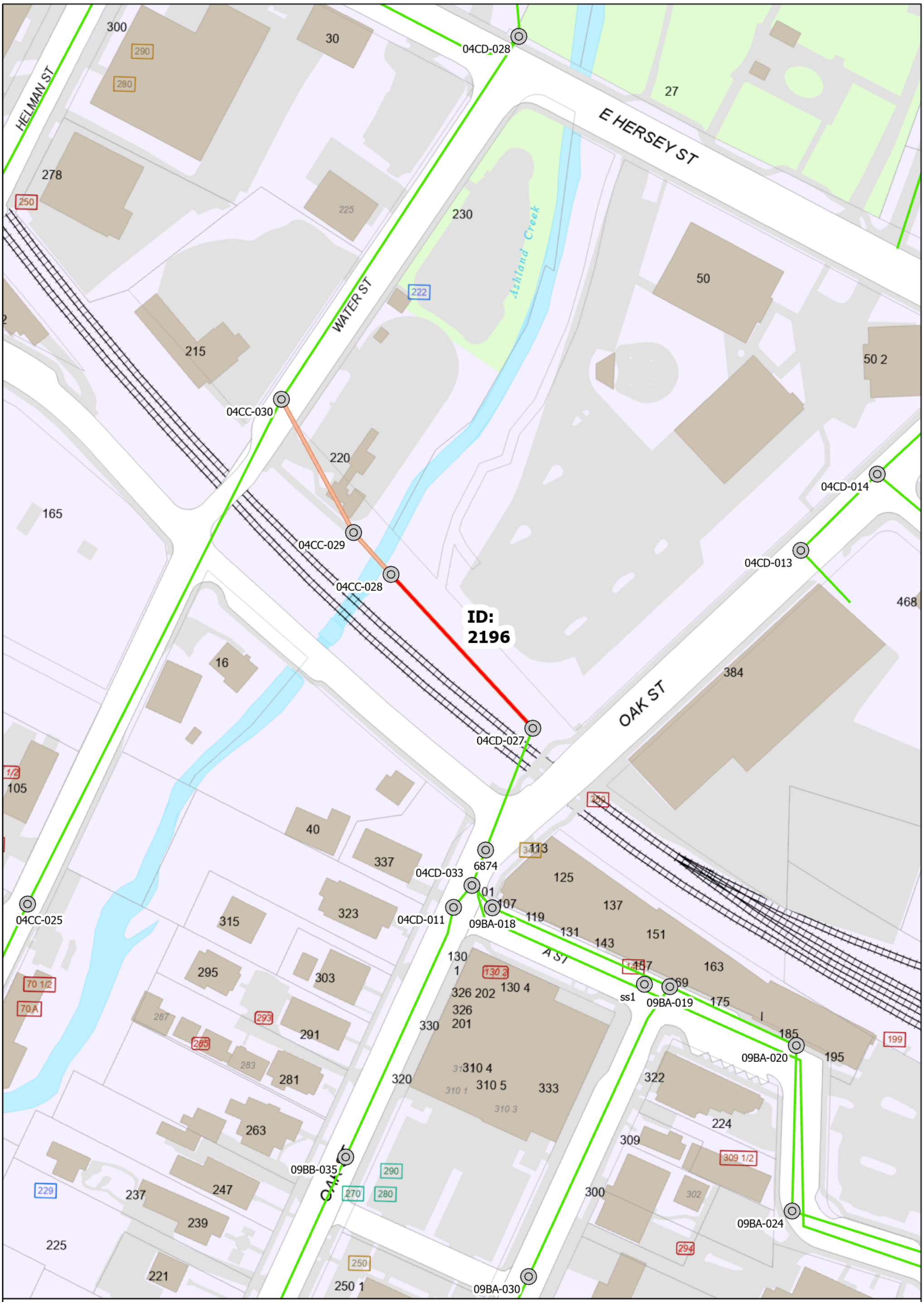
496 A
496 B
497 B
497 A
497 A/B
496
499
CATALINA DR
486 A
486 B
487
492
05DB-022
05DB-023
246
246 5&6
246 1&2
477 475 473
246 6
246 5
246 2
246 1
480
478
472
ID: 1646
Size: 6"
Type: Concrete Segments (Unbolted)
From: 05DB-019
To: 05DB-029
Length: 397.2 Ft
Page Number: 12
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together


HELMAN ST
E HERSEY ST
WATER ST
OAK ST
Ashland Creek
04CD-028
04CC-030
04CC-029
04CC-028
04CD-027
04CD-014
04CD-013
04CD-033
6874
04CD-011
09BA-018
09BA-019
09BA-020
09BA-024
09BA-030
09BB-035
04CC-025
ss1
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2196
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50 2
215
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195
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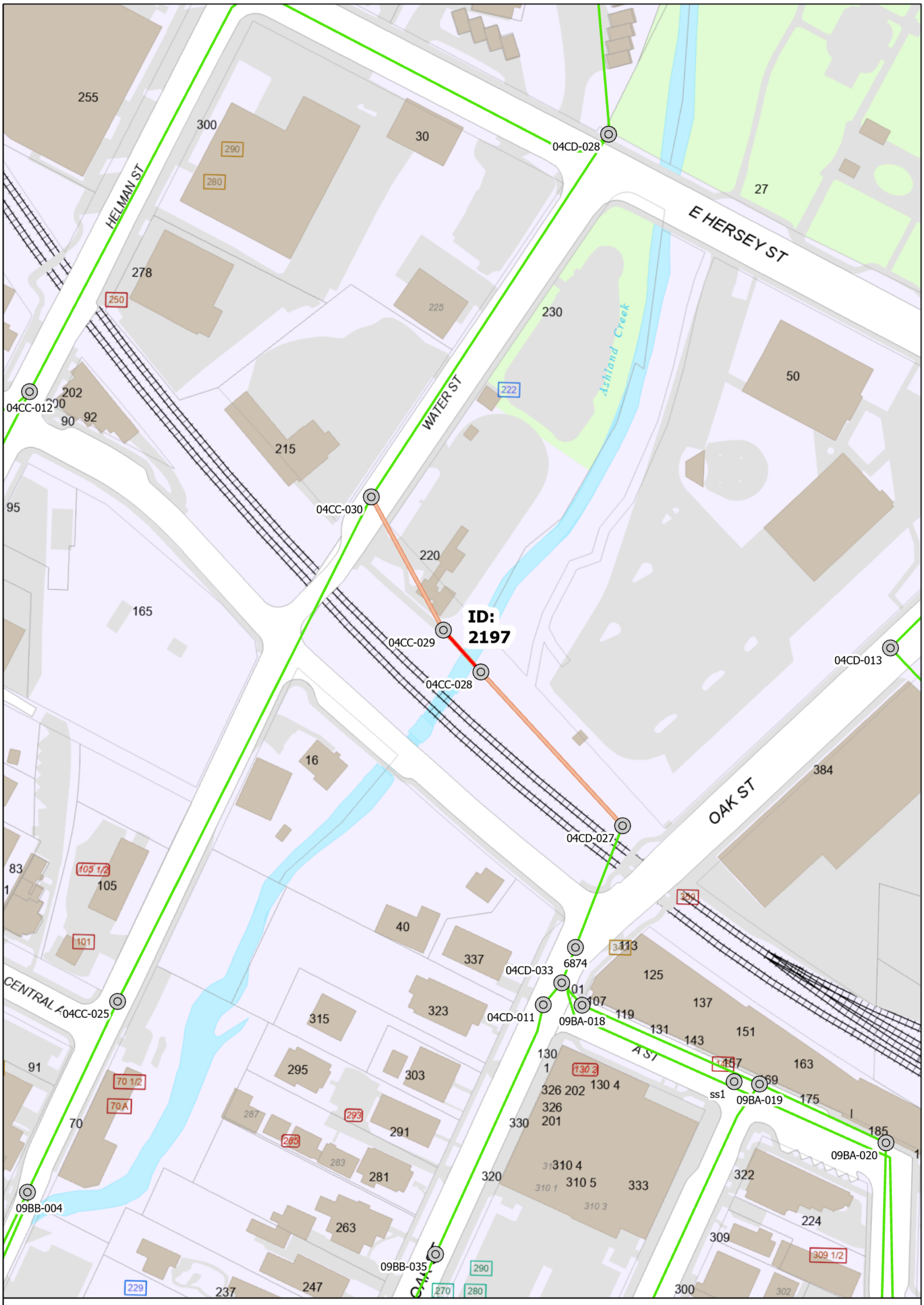
224
309
309 1/2
300
320
310 4
310 5
333
330
201
326 202
326
130 4
130
1
107
119
131
143
113
69
ID: 2196
Size: 12"
Type: Clay Tile
From: 04CD-027
To: 04CC-028
Length: 200.37 Ft
Page Number: 16
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together



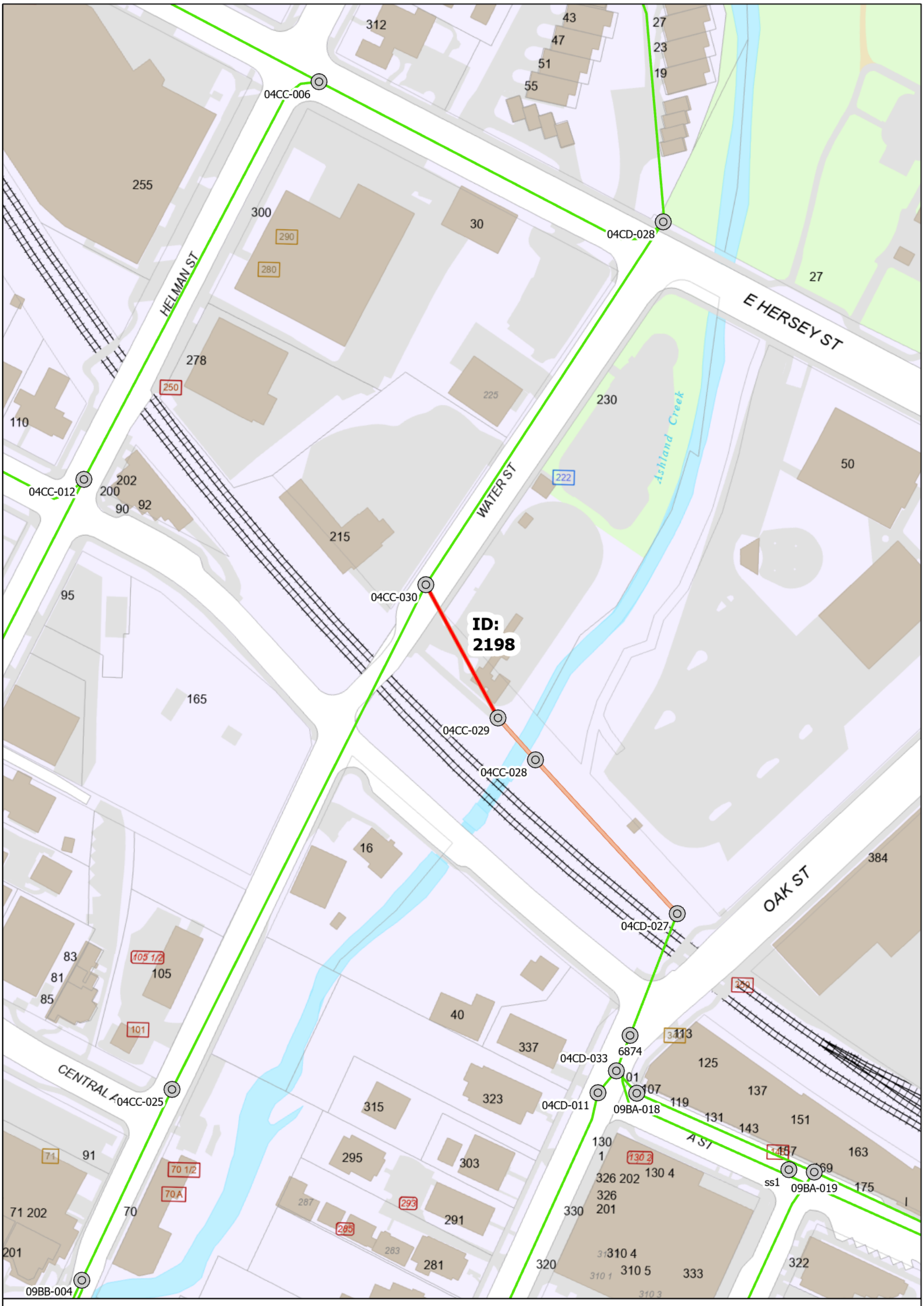
ID: 2197
Size: 12"
Type: Concrete Segments (Unbolted)
From: 04CC-028
To: 04CC-029
Length: 53.82 Ft
Page Number: 17

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet

Better Together



ID: 2198

Size: 12"
Type: Concrete Segments (Unbolted)
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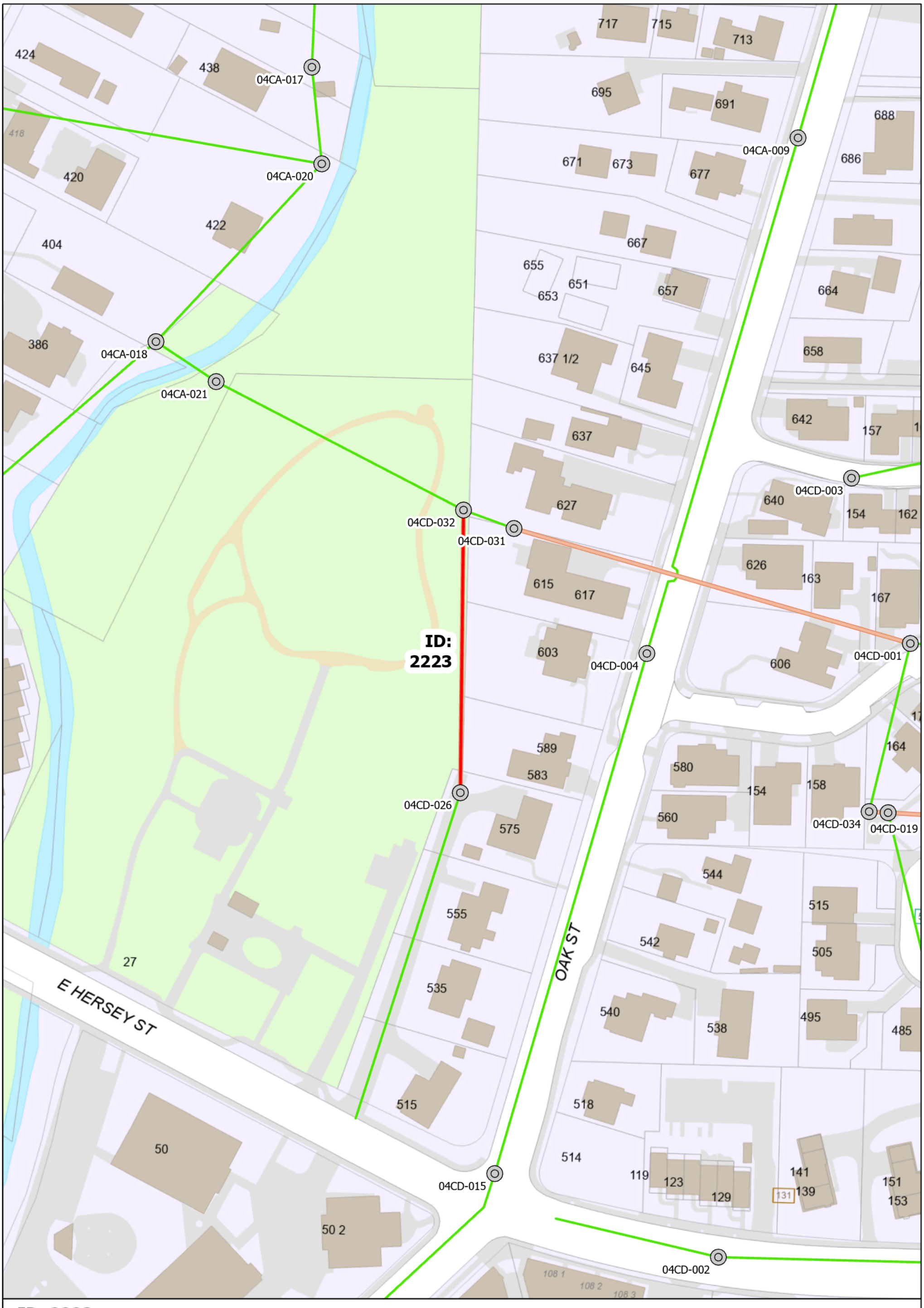
To: 04CC-030
Length: 145.12 Ft
Page Number: 18

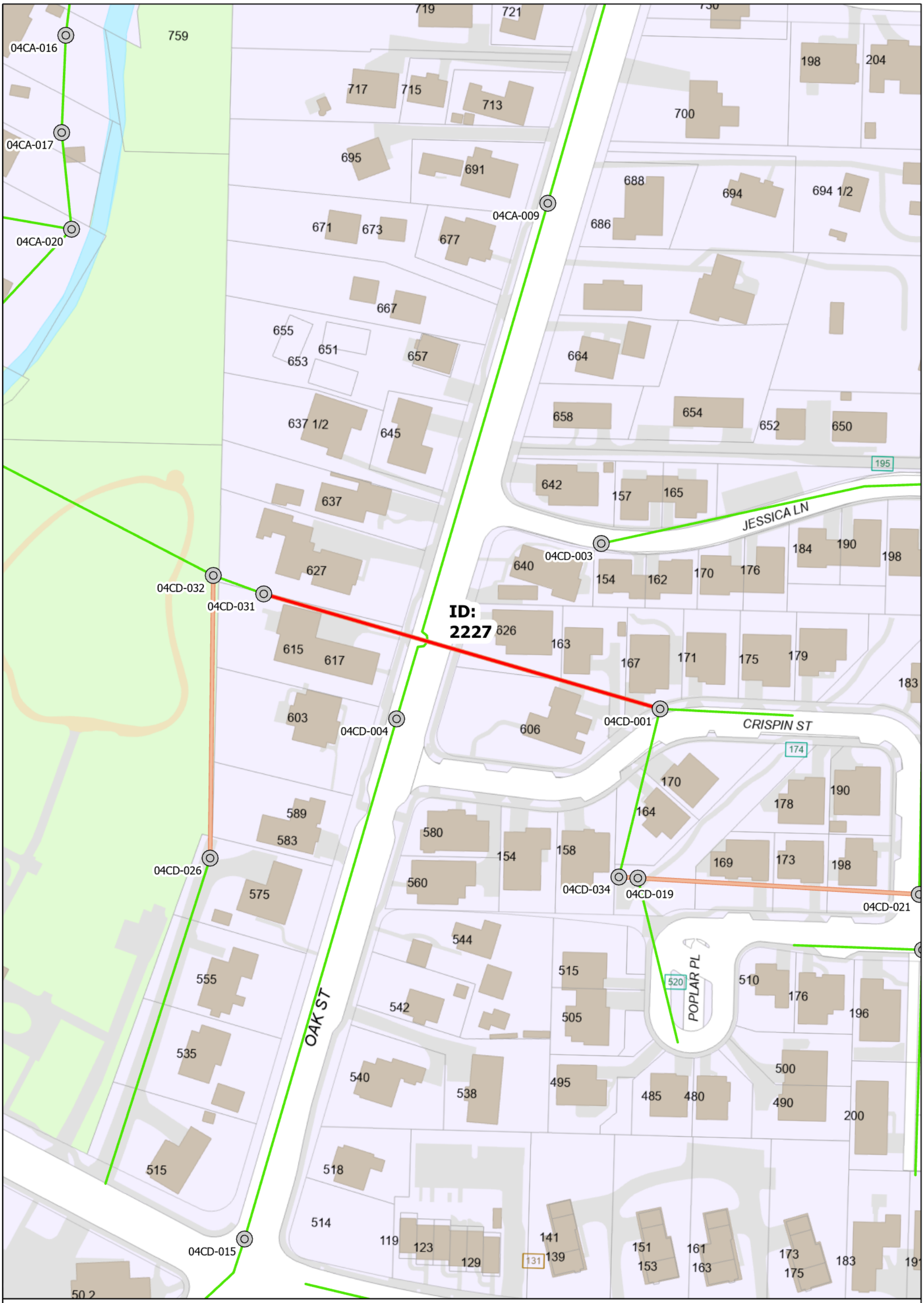


ID: 2223
Size: 6"
Type: Concrete Segments (Unbolted)
From: 04CD-026
To: 04CD-032
Length: 270.7 Ft
Page Number: 19

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet

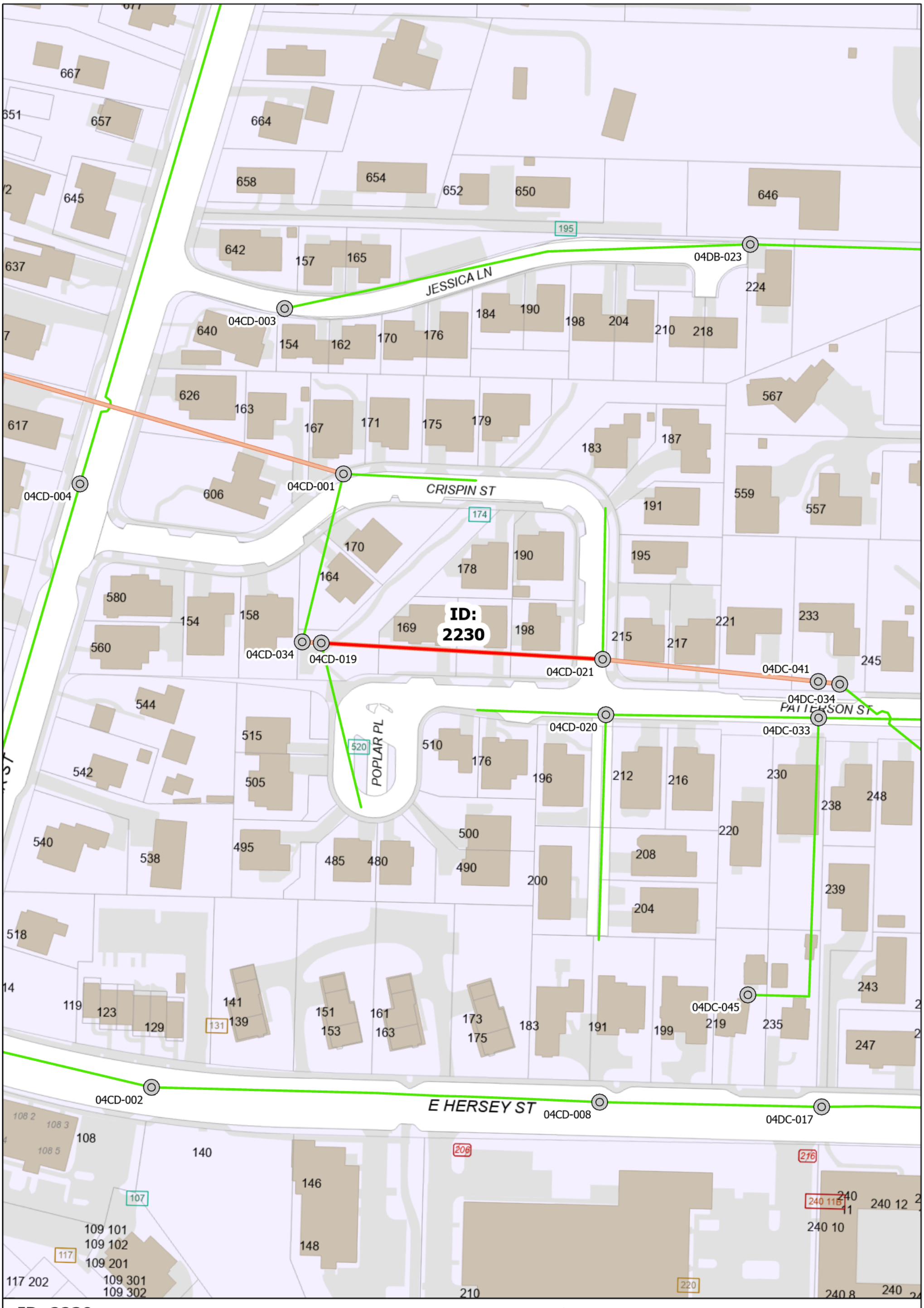


ID: 2227
Size: 10"
Type: Concrete Segments (Unbolted)
From: 04CD-001
To: 04CD-031
Length: 395.29 Ft
Page Number: 20

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet



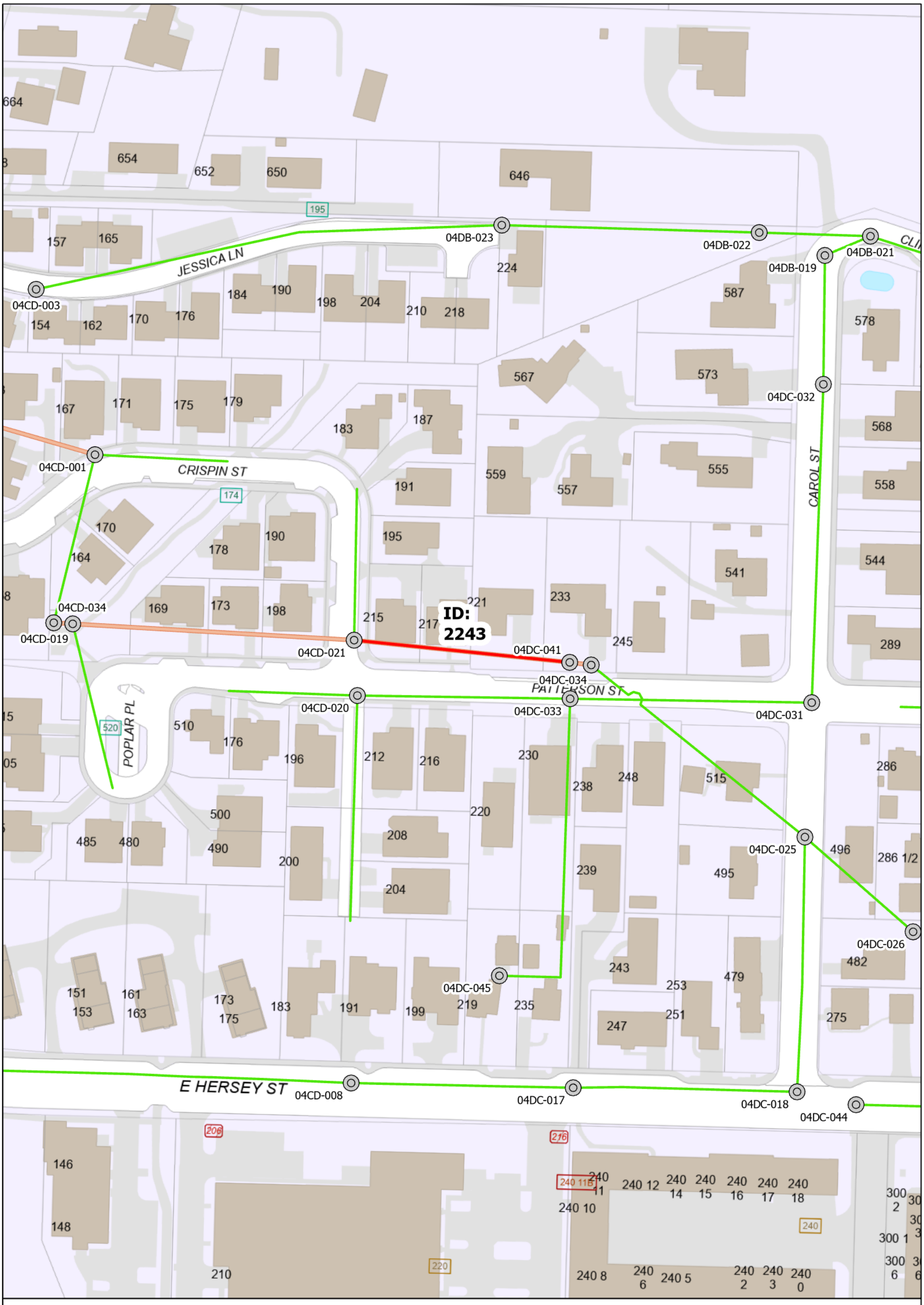
ID: 2230

Size: 10"
Type: Concrete Segments (Unbolted)
From: 04CD-021
To: 04CD-019
Length: 269.98 Ft
Page Number: 21

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet



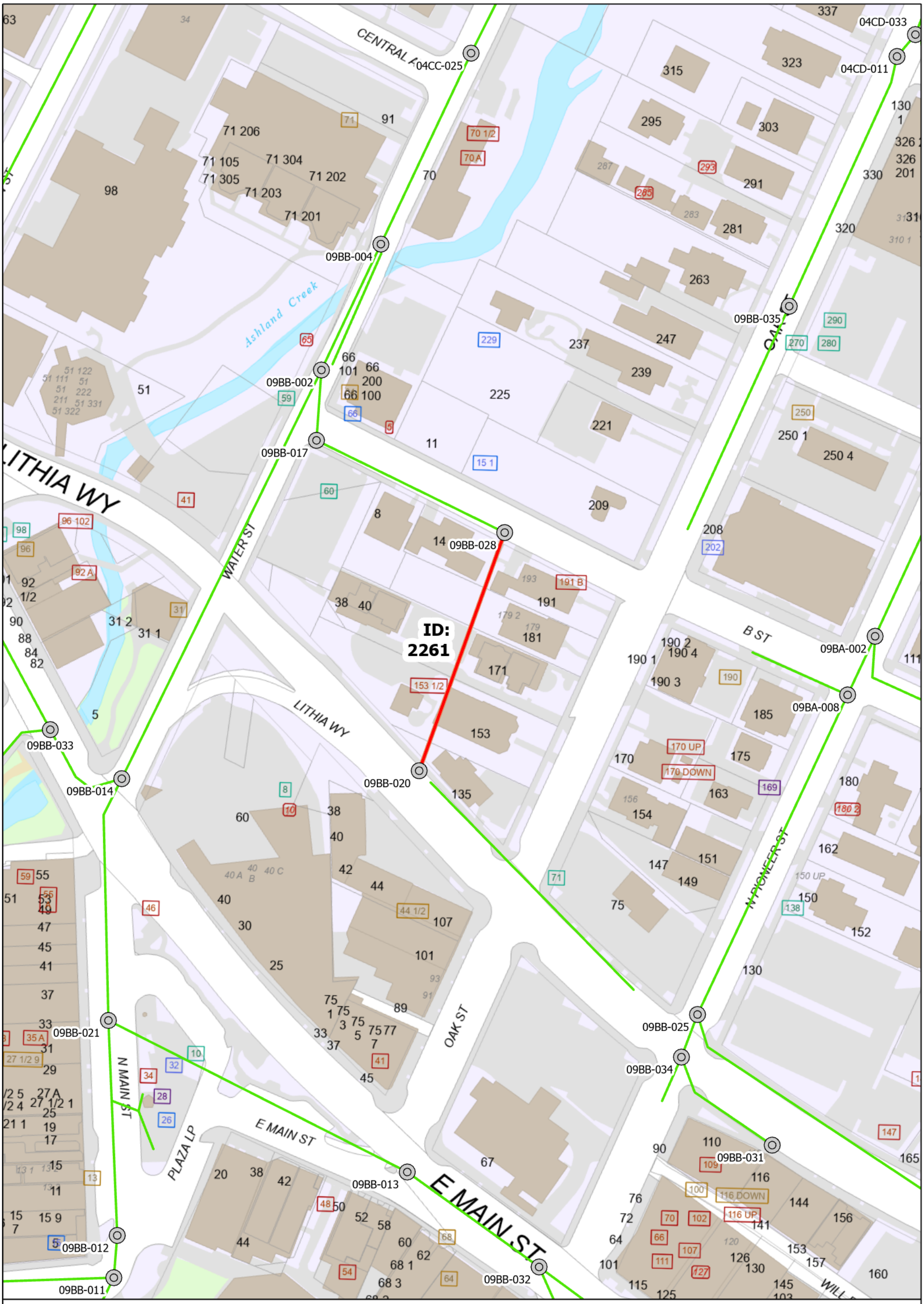
ID: 2243
Size: 10"
Type: Clay Tile
From: 04DC-041
To: 04CD-021
Length: 207.58 Ft
Page Number: 22

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet

Better Together



ID: 2261
Size: 6"
Type: Concrete Segments (Unbolted)
From: 09BB-020
To: 09BB-028
Length: 242.25 Ft
Page Number: 23

ID: 2539

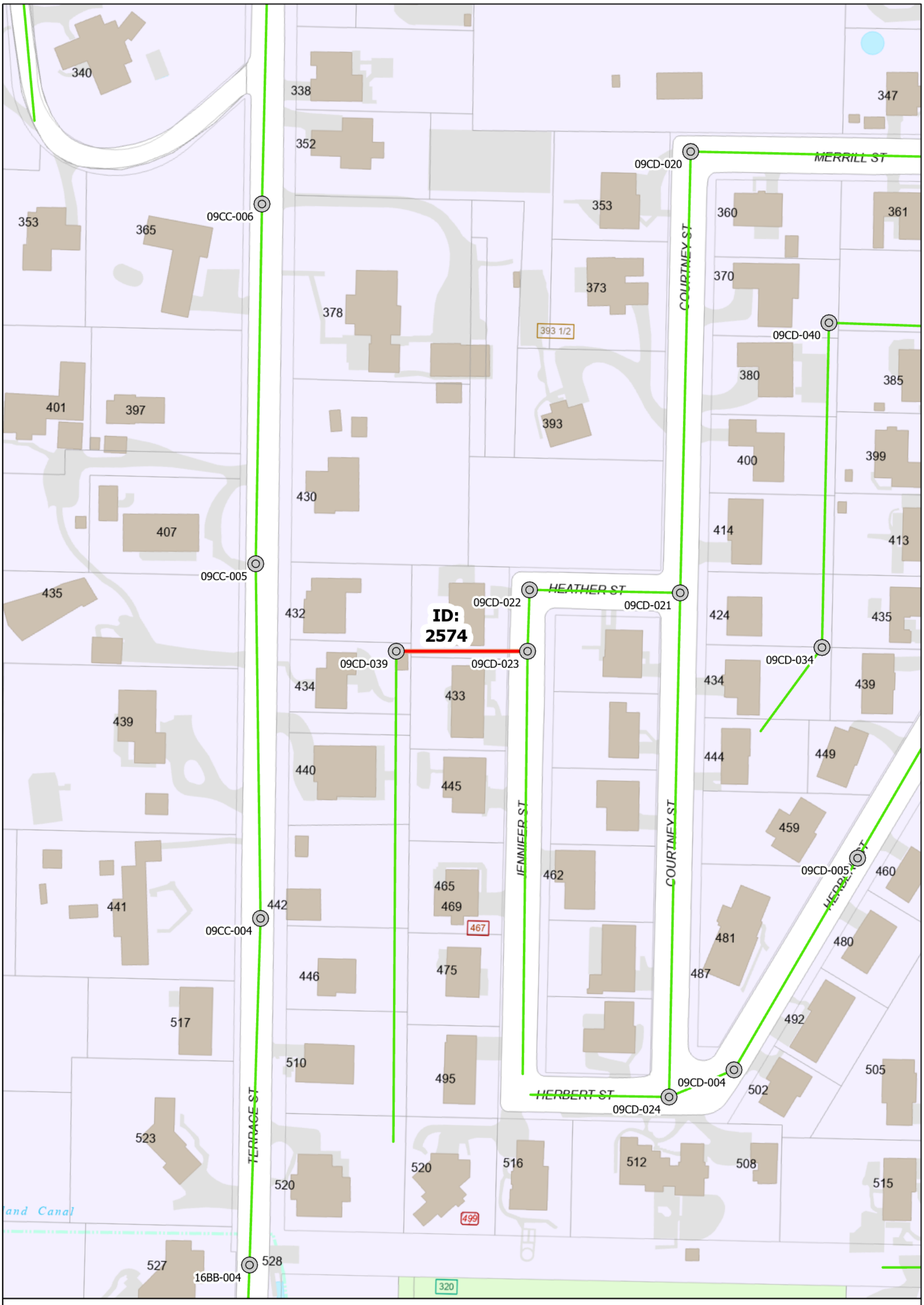
Size: 6"
Type: Clay Tile
From:
To: 09CA-005
Length: 281.06 Ft
Page Number: 24

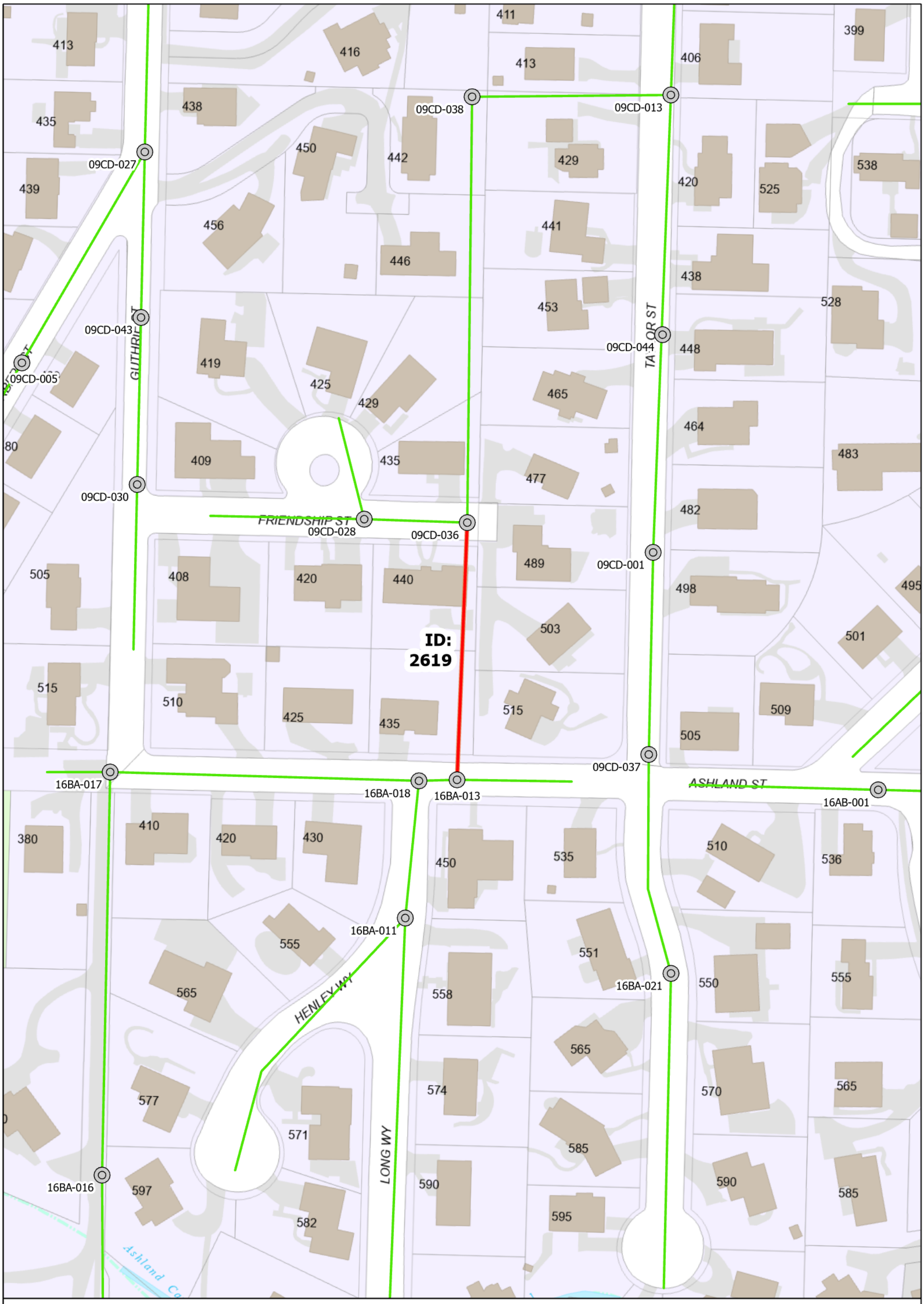
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet

Better Together


340
338
352
347
09CD-020
MERRILL ST
09CC-006
353
365
353
360
361
COURTNEY ST
370
373
378
393 1/2
09CD-040
380
385
401
397
393
400
399
430
407
09CC-005
435
414
413
HEATHER ST
09CD-022
09CD-021
ID:
2574
432
424
435
09CD-039
09CD-023
09CD-034
434
433
434
439
439
440
445
444
449
459
JENNIFER ST
COURTNEY ST
09CD-005
462
460
465
469
441
442
09CC-004
467
481
480
446
475
487
517
492
510
495
505
09CD-004
HERBERT ST
502
09CD-024
523
TERRACE ST
520
520
516
512
508
515
499
527
528
16BB-004
320
ID: 2574
Size: 6"
Type: Concrete Segments (Unbolted)
From: 09CD-039
To: 09CD-023
Length: 125.73 Ft
Page Number: 25
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together

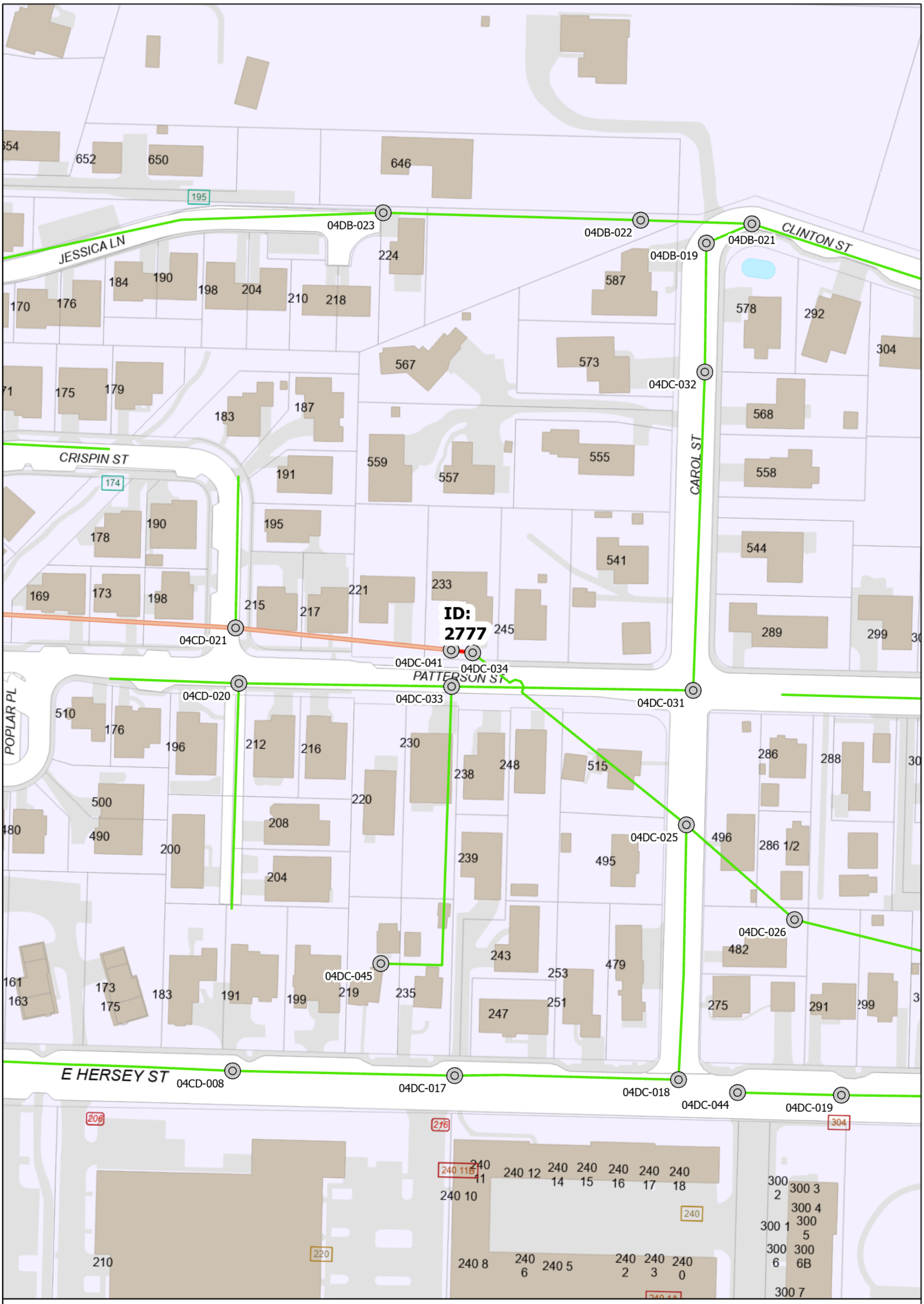


ID: 2619
Size: 6"
Type: Concrete Segments (Unbolted)
From: 16BA-013
To: 09CD-036
Length: 246.56 Ft
Page Number: 26

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet

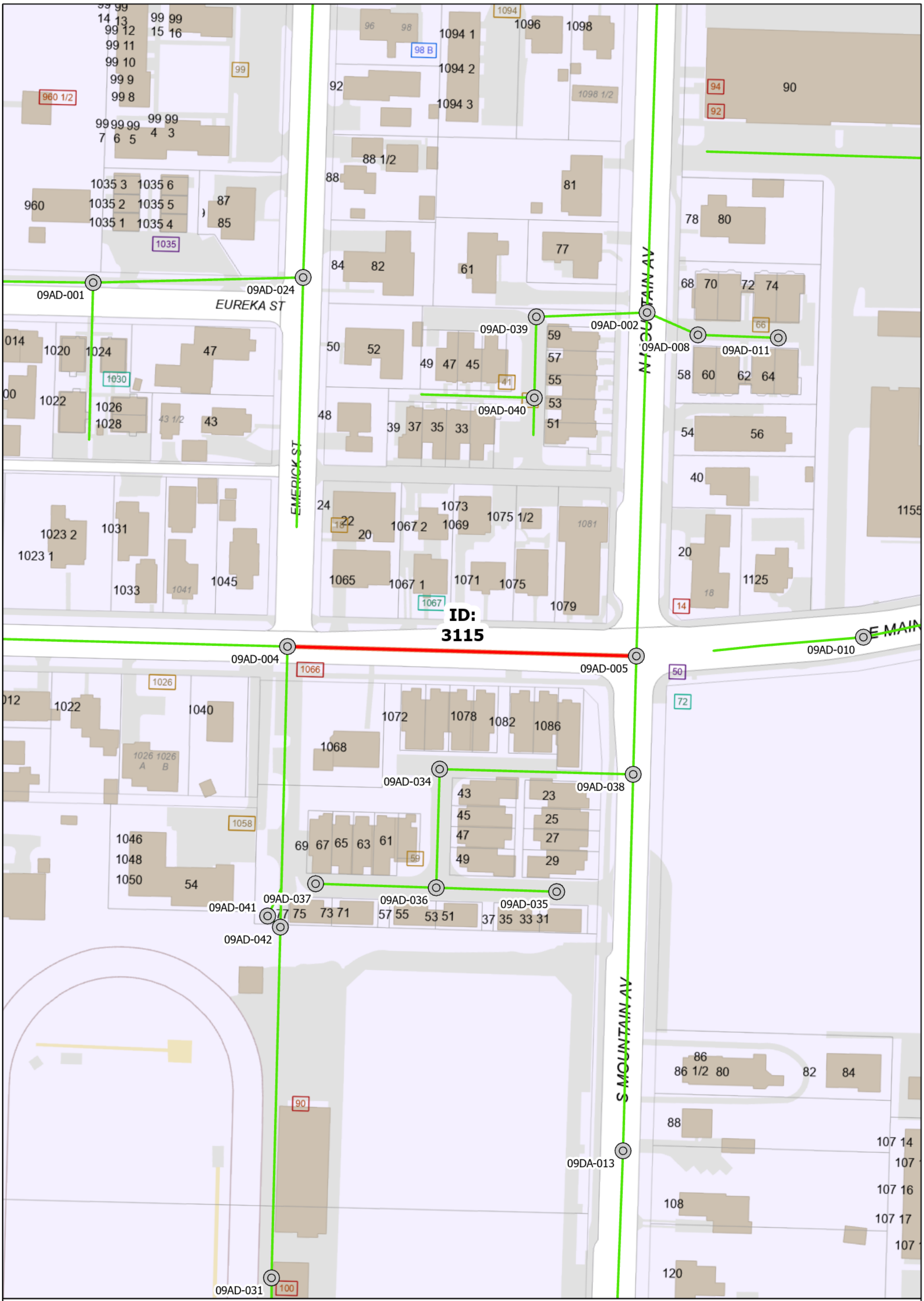


ID: 2777

Size: 10"
Type: Concrete Segments (Unbolted)
From: 04DC-034
To: 04DC-041
Length: 20.75 Ft
Page Number: 27

ID: 3104

Size: 8"
Type: Clay Tile
From: 09AC-033
To: 09DB-020
Length: 399.12 Ft
Page Number: 28



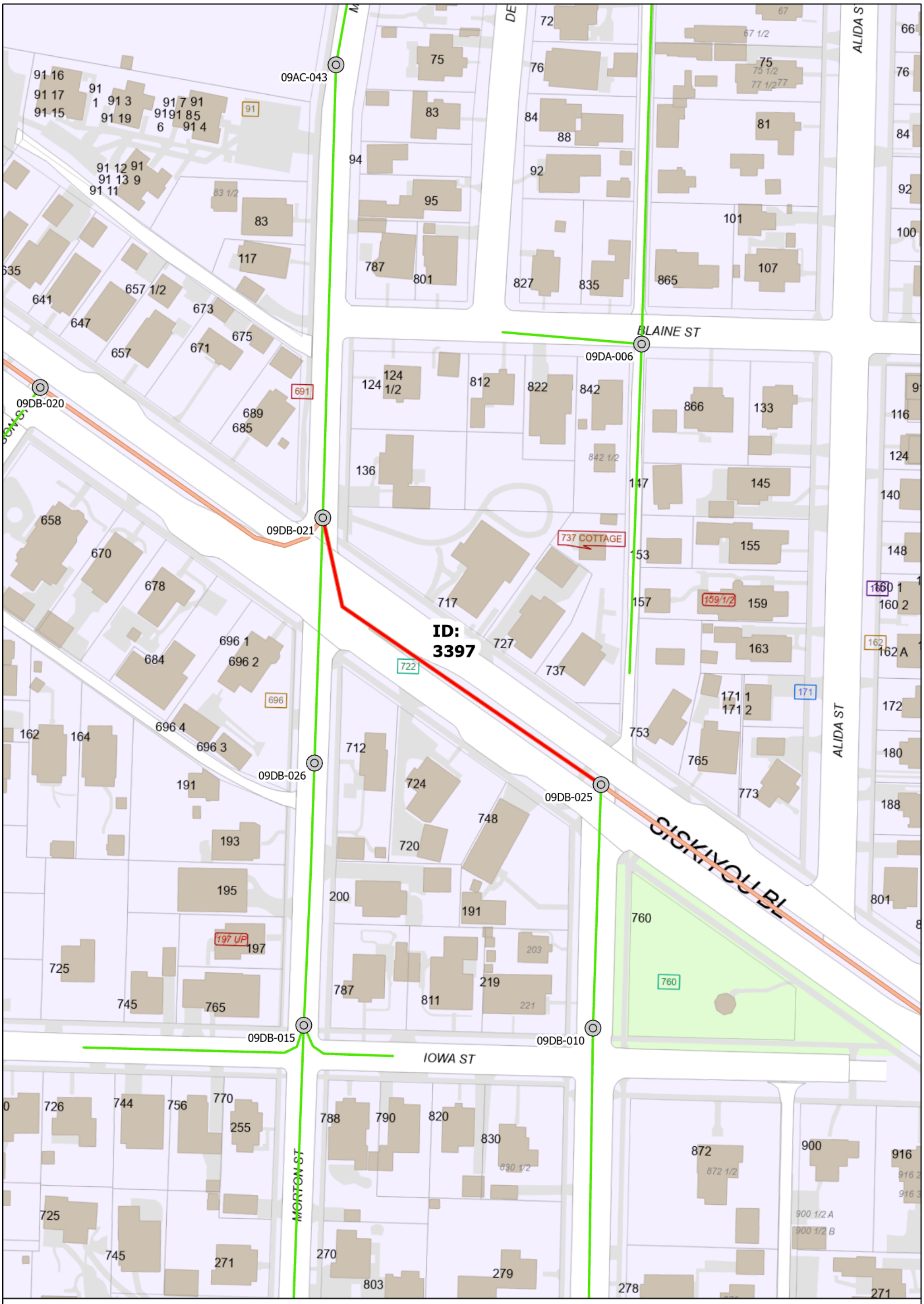
ID: 3115
Size: 8"
Type: Concrete Segments (Unbolted)
From: 09AD-004
To: 09AD-005
Length: 334.27 Ft
Page Number: 29

ID: 3323
Size: 8"
Type: Clay Tile
From: 09DB-020
To: 09DB-021
Length: 327.46 Ft
Page Number: 30

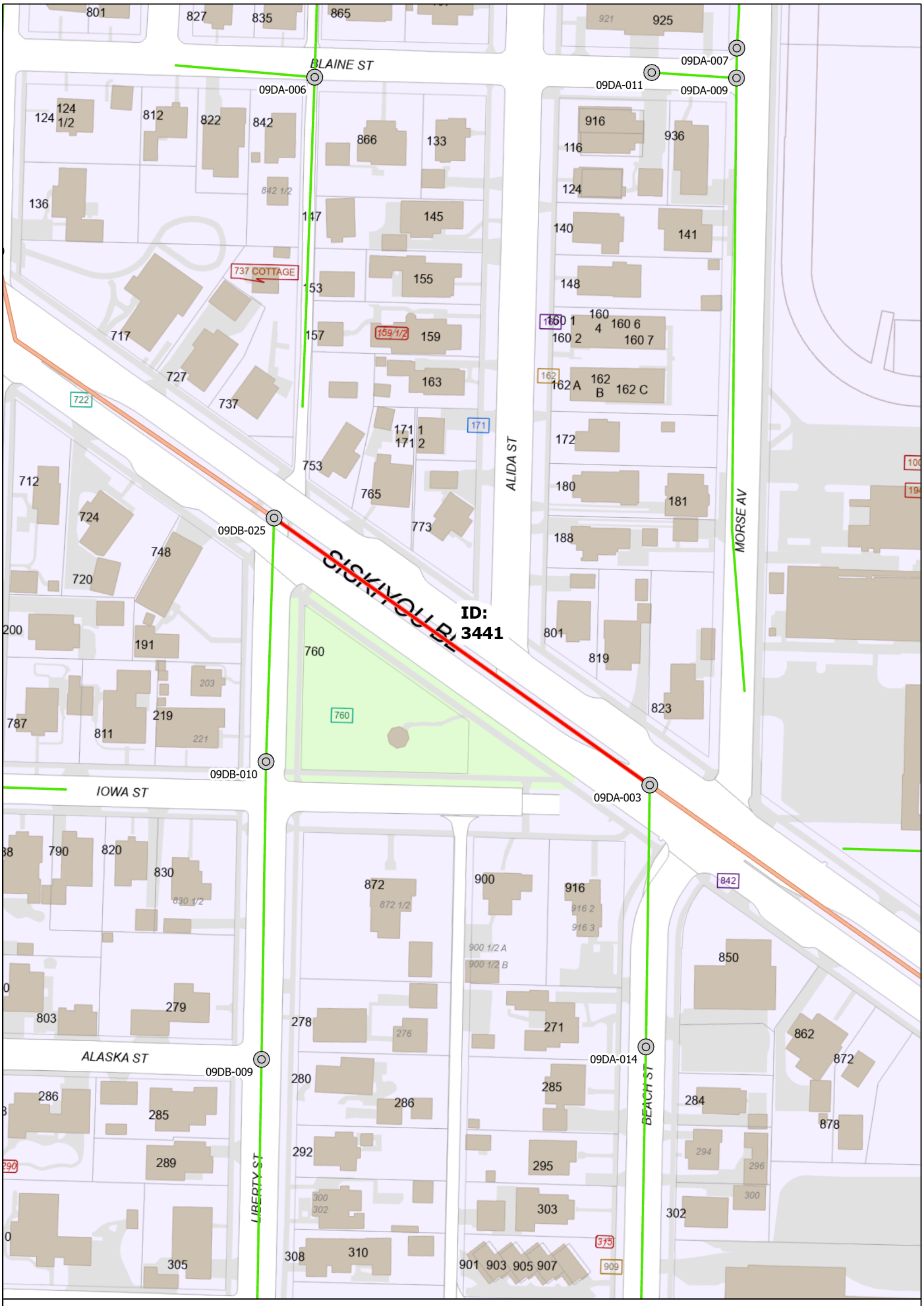
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

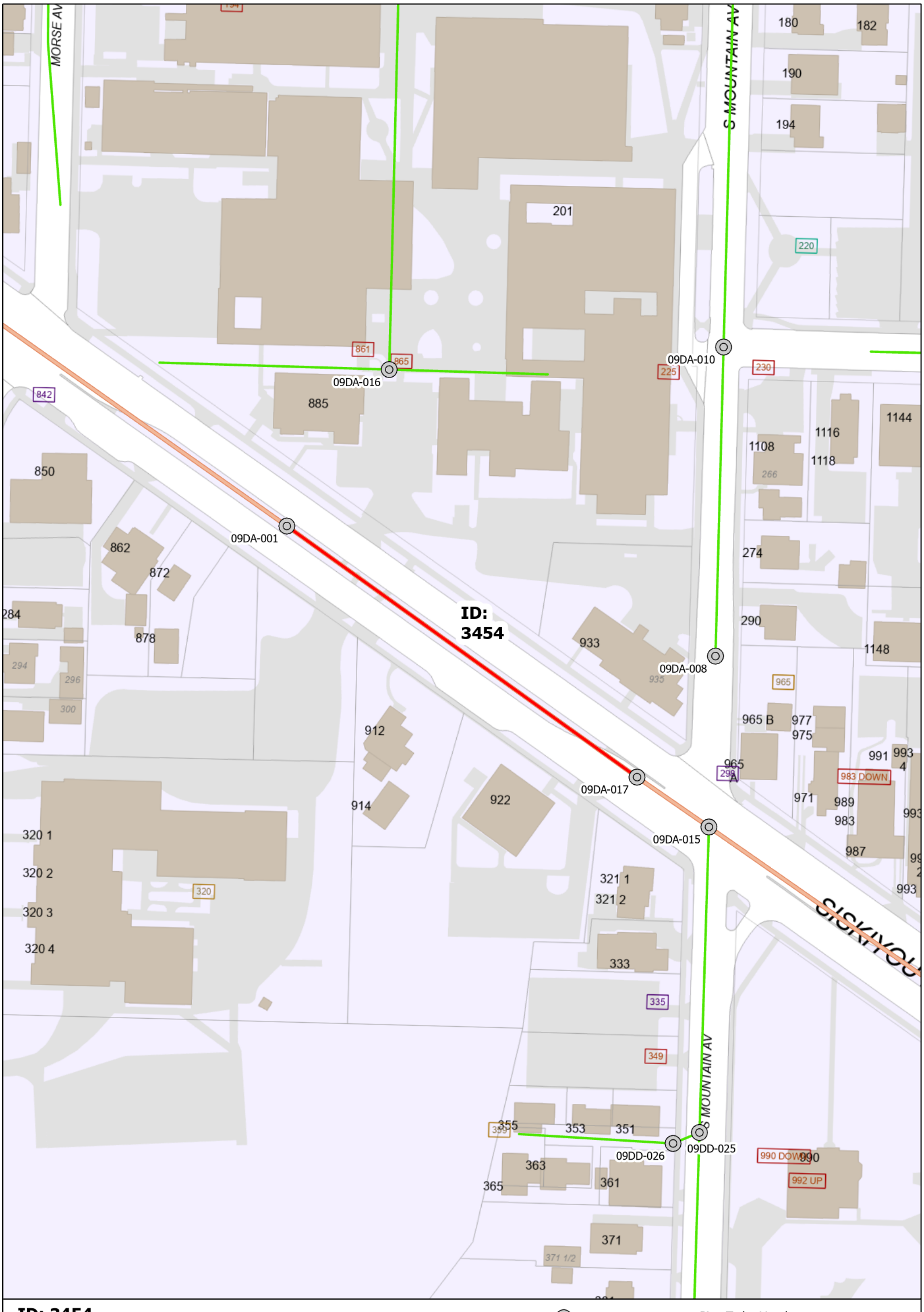
N

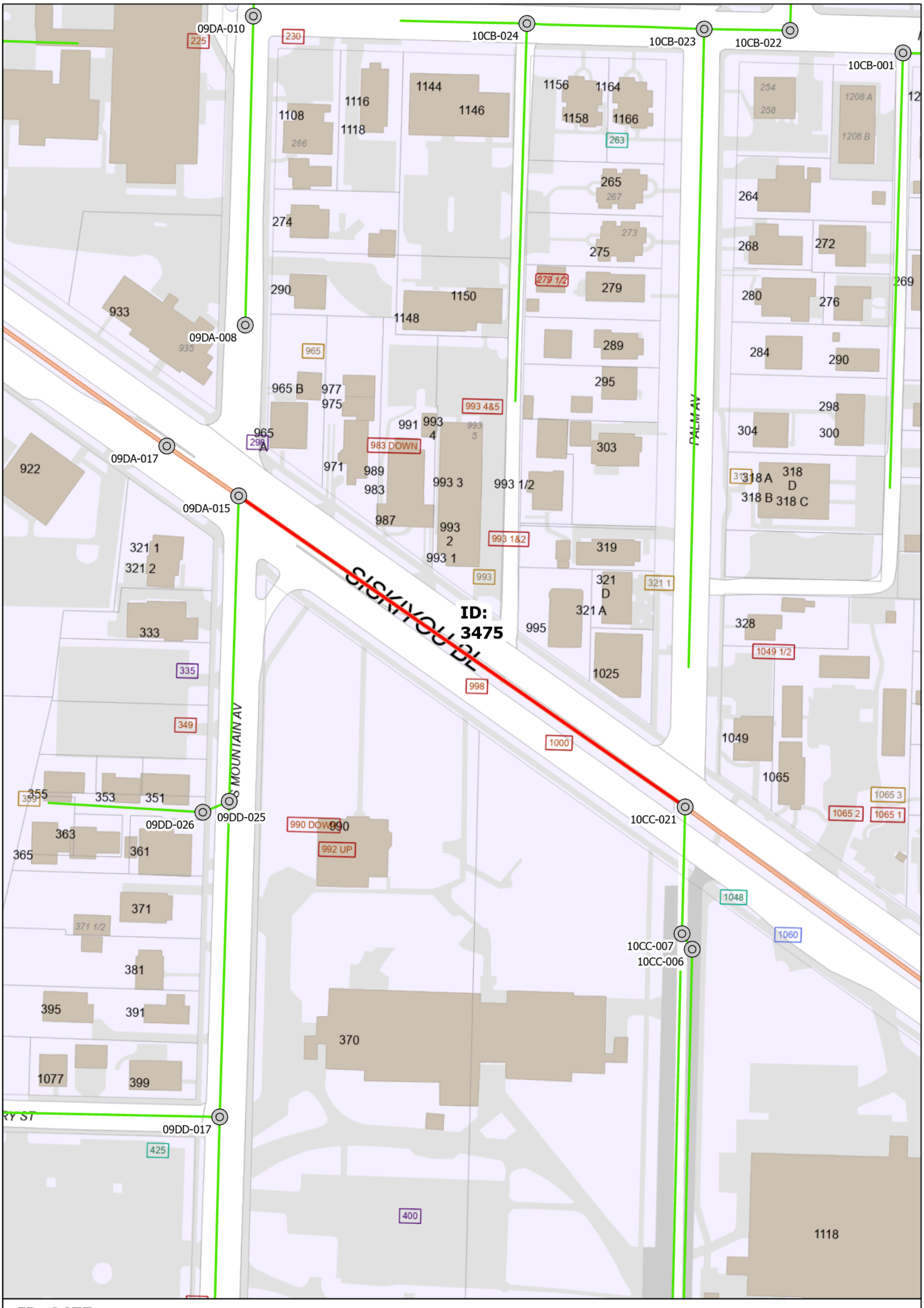
0 125 250 Feet



ID: 3397
Size: 8"
Type: Clay Tile
From: 09DB-025
To: 09DB-021
Length: 387.88 Ft
Page Number: 31


BLAINE ST
09DA-006
09DA-007
09DA-011
09DA-009
09DB-025
09DB-010
09DA-003
09DA-014
09DB-009
ID: 3441
IOWA ST
ALASKA ST
LIBERTY ST
BEACH ST
MORSE AV
ALIDA ST
737 COTTAGE
801
827
835
865
921
925
916
936
116
124
124 1/2
812
822
842
842 1/2
866
133
136
147
145
140
141
148
155
153
157
159
159 1/2
160 1
160 2
160 4
160 6
160 7
162
162 A
162 B
162 C
163
717
727
737
722
171
171 1
171 2
172
753
712
724
748
720
765
773
180
181
188
200
191
203
219
221
787
811
760
801
819
823
790
820
830
830 1/2
872
872 1/2
900
900 1/2 A
900 1/2 B
916 2
916 3
842
850
803
279
278
276
271
862
872
878
280
286
285
284
292
289
294
296
300
302
295
303
308
310
305
315
901 903 905 907
909
ID: 3441
Size: 8"
Type: Clay Tile
From: 09DA-003
To: 09DB-025
Length: 441.4 Ft
Page Number: 32
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together


MORSE AV
S MOUNTAIN AV
180
182
190
194
201
220
861
865
09DA-016
09DA-010
225
230
842
885
1144
1116
1108
1118
266
850
09DA-001
862
872
284
878
294
296
300
ID:
3454
933
935
09DA-008
274
290
1148
965
965 B
977
975
991
993
4
965
298
A
983 DOWN
971
989
983
987
912
914
922
09DA-017
09DA-015
320 1
320 2
320 3
320 4
320
321 1
321 2
333
335
349
355
359
353
351
09DD-026
09DD-025
363
365
361
371
371 1/2
990 DOWN
990
992 UP
S MOUNTAIN AV
ID: 3454
Size: 8"
Type: Clay Tile
From: 09DA-017
To: 09DA-001
Length: 412.67 Ft
Page Number: 33
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together

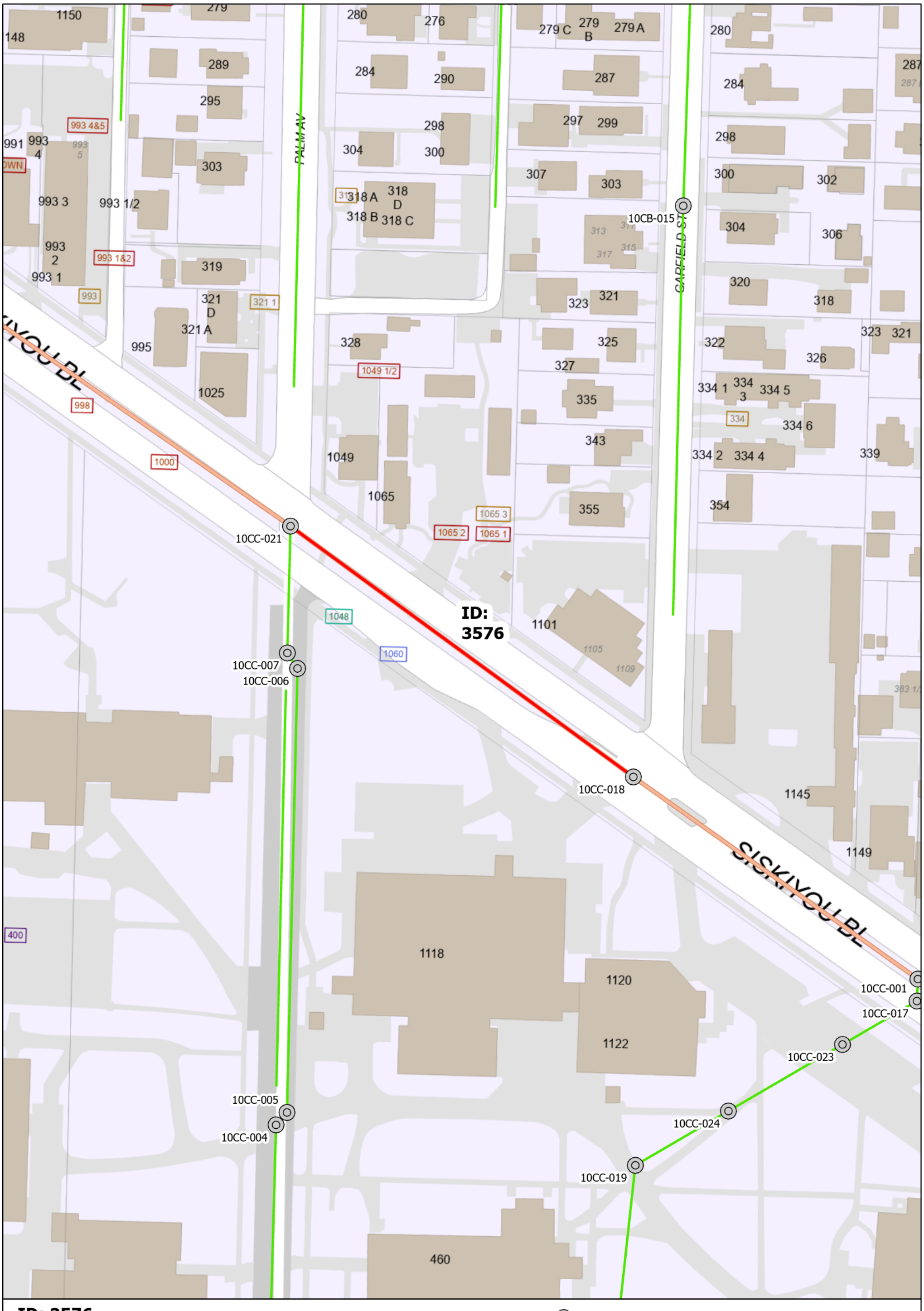


ID: 3475
Size: 8"
Type: Clay Tile
From: 10CC-021
To: 09DA-015
Length: 521.15 Ft
Page Number: 34

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet



ID: 3576

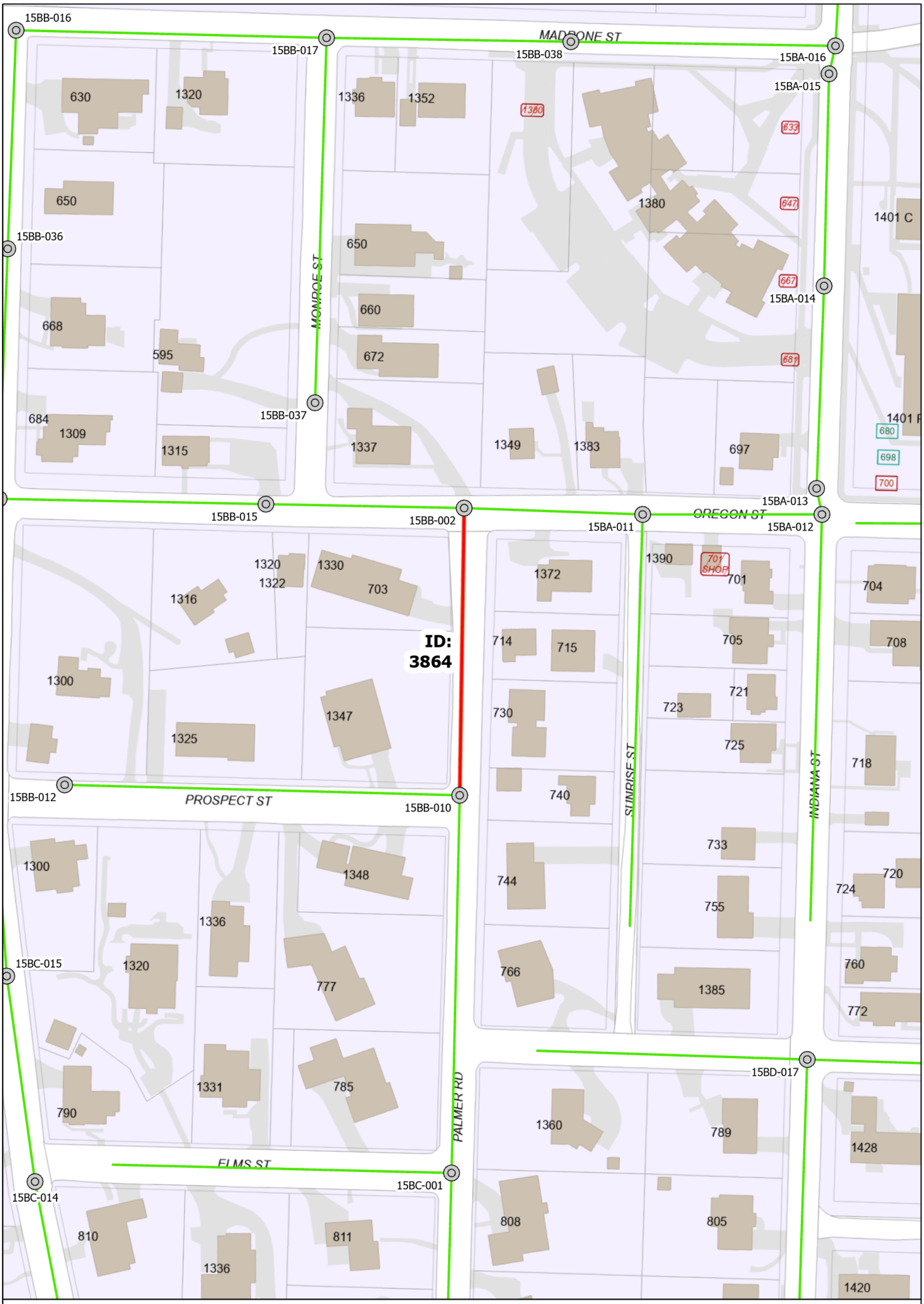
Size: 8"
Type: Clay Tile
From: 10CC-018
To: 10CC-021
Length: 406.82 Ft
Page Number: 35

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

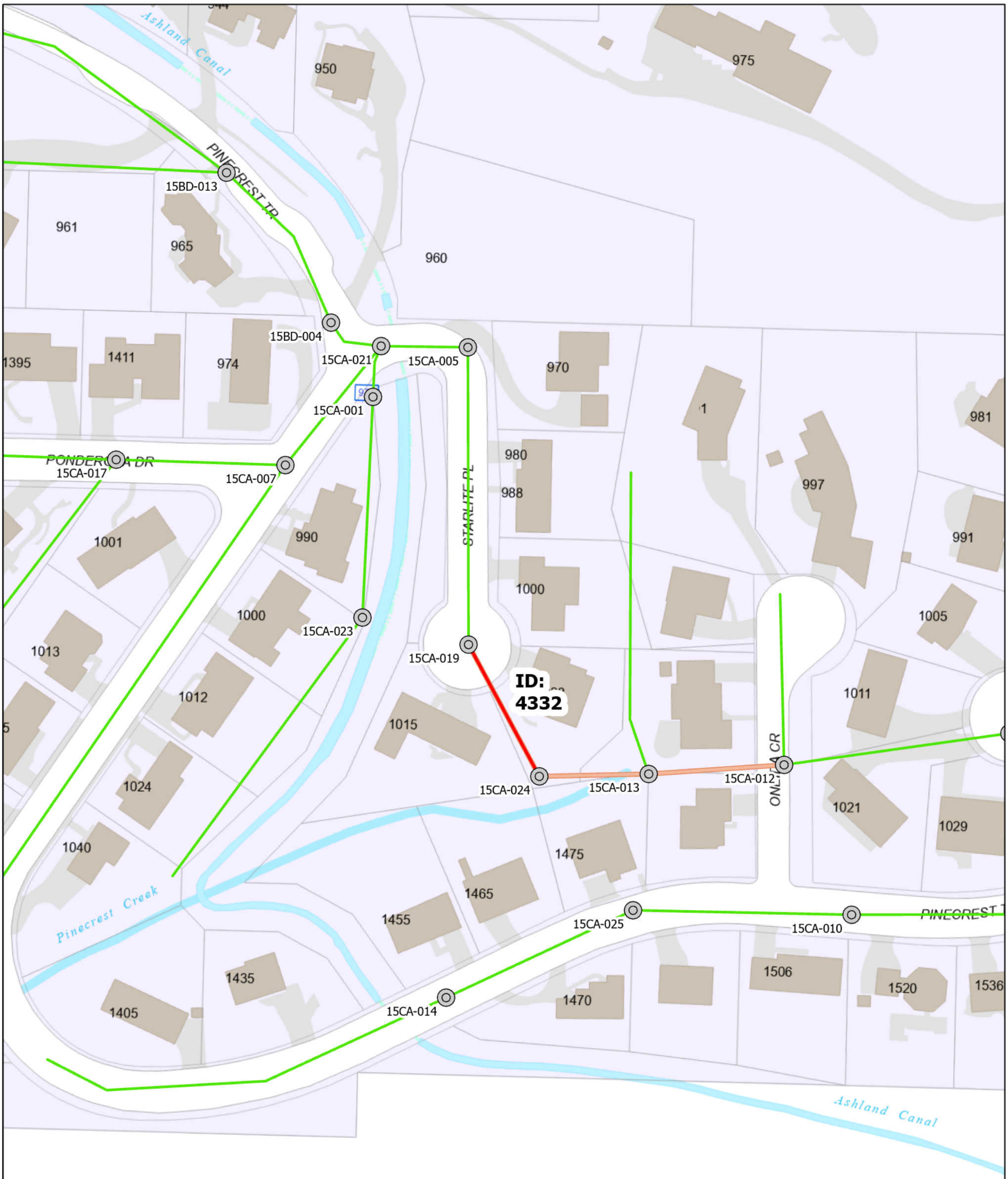
0 125 250 Feet

Better Together



ID: 3864

Size: 6"
Type: Clay Tile
From: 15BB-010
To: 15BB-002
Length: 274.98 Ft
Page Number: 36



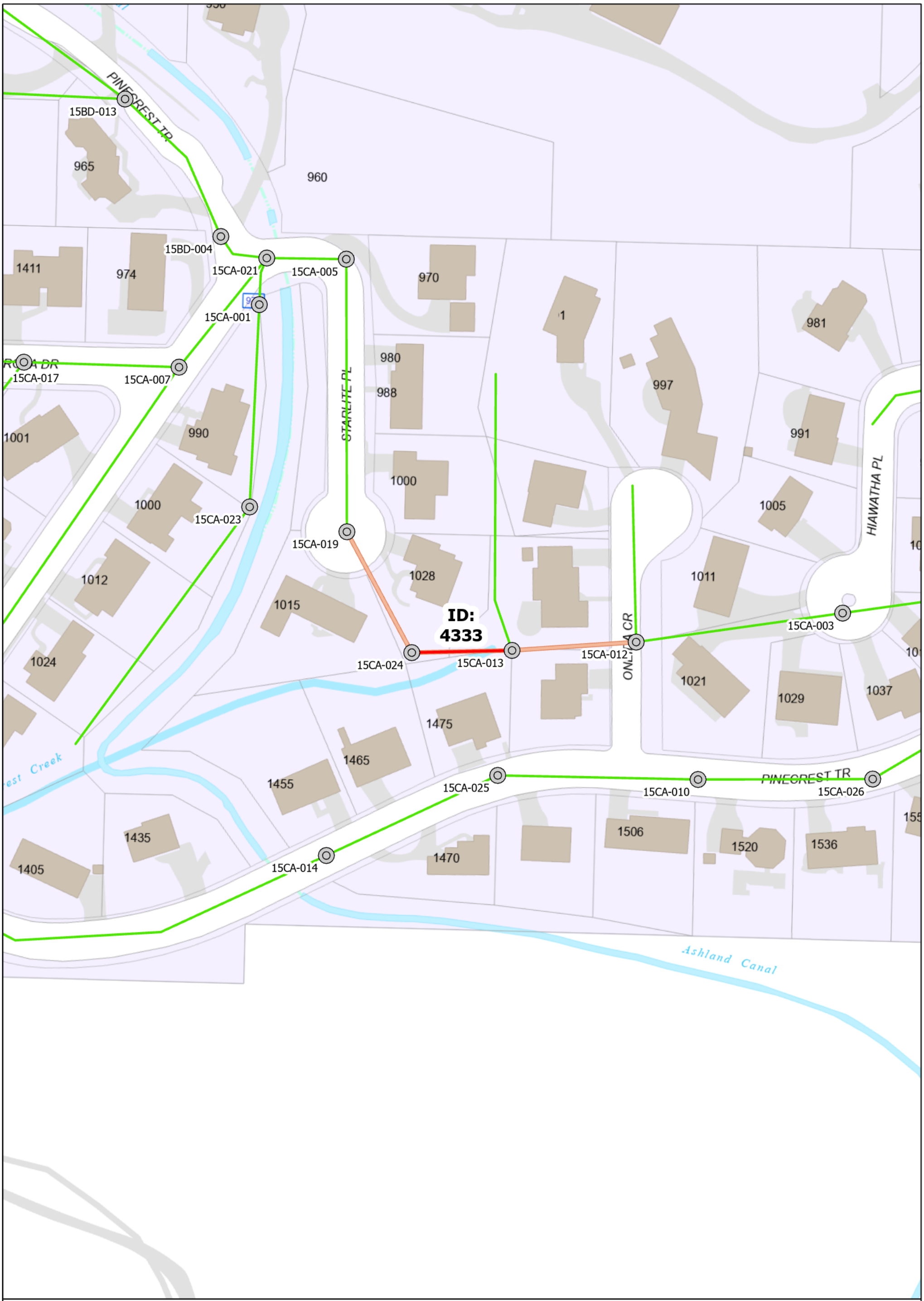
ID: 4332

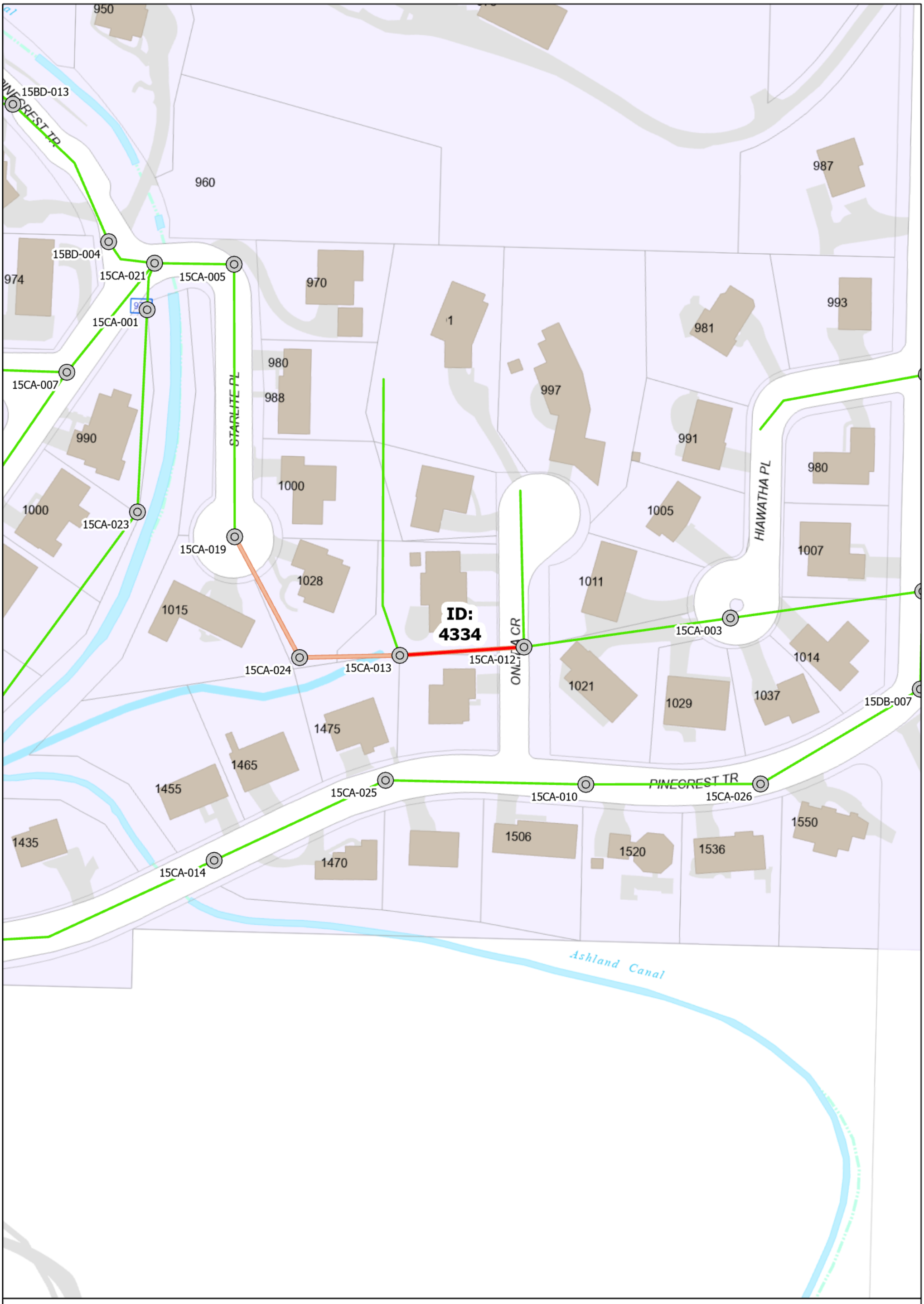
Size: 6"
Type: Concrete Segments (Unbolted)
From: 15CA-019
To: 15CA-024
Length: 131.34 Ft
Page Number: 37

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet


PINECREST TR
15BD-013
965
960
15BD-004
15CA-021
15CA-005
1411
974
970
15CA-001
981
980
15CA-017
15CA-007
997
988
STARLITE PL
1001
990
991
1000
15CA-023
1000
15CA-019
1005
1012
1028
1011
1015
ID:
4333
15CA-003
1024
15CA-024
15CA-013
15CA-012
1021
1029
1037
1475
1465
1455
15CA-025
15CA-010
PINECREST TR
15CA-026
1435
1506
1520
1536
1405
1470
15CA-014
Ashland Canal
ID: 4333
Size: 6"
Type: Concrete Segments (Unbolted)
From: 15CA-024
To: 15CA-013
Length: 96.07 Ft
Page Number: 38
ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined
N
0
125
250 Feet
Better Together

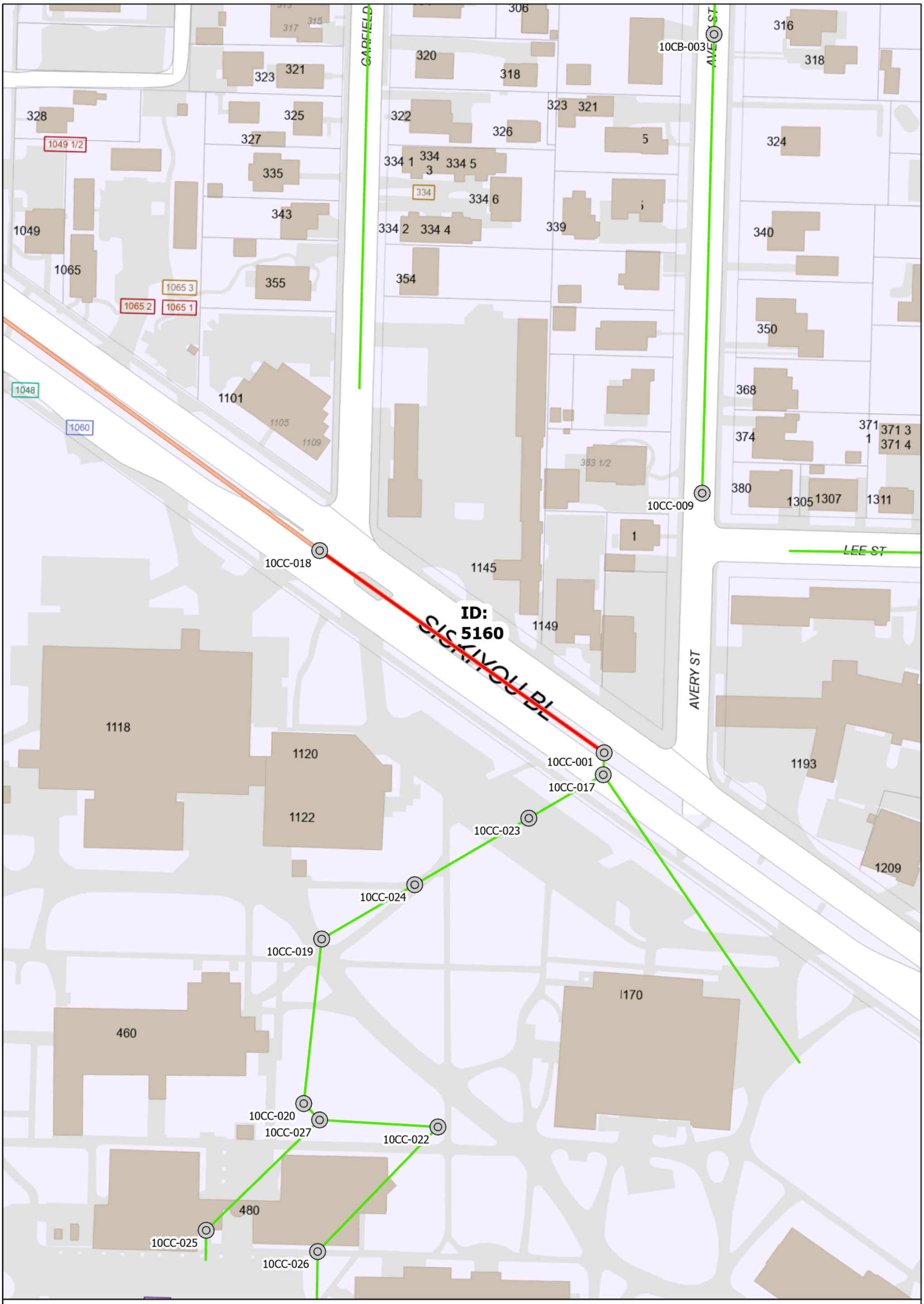


ID: 4334
Size: 6"
Type: Concrete Segments (Unbolted)
From: 15CA-013
To: 15CA-012
Length: 119.13 Ft
Page Number: 39

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet



ID: 5160

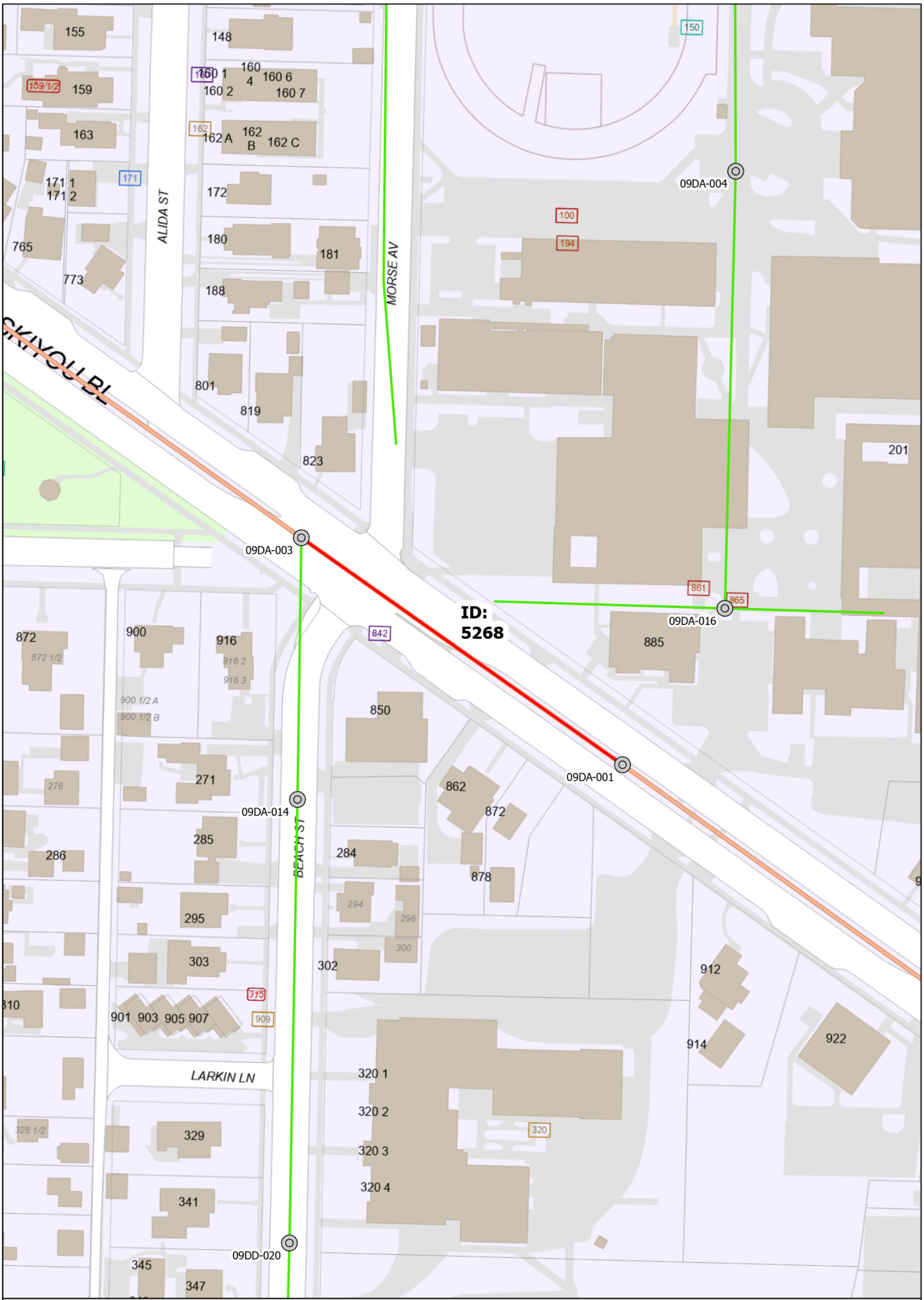
Size: 8"
Type: Clay Tile
From: 10CC-001
To: 10CC-018
Length: 334.24 Ft
Page Number: 43

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet

Better Together

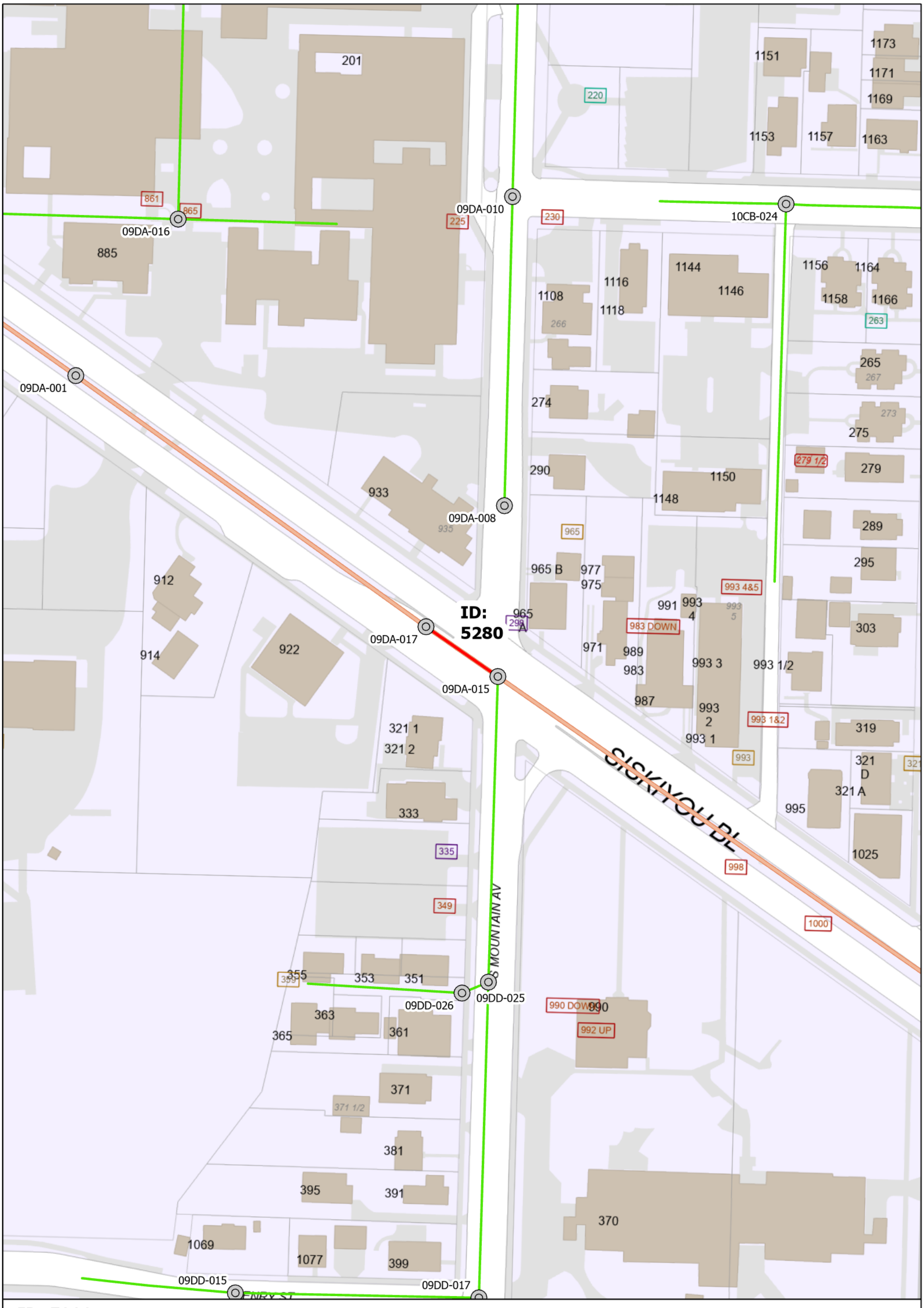


ID: 5268
Size: 8"
Type: Clay Tile
From: 09DA-001
To: 09DA-003
Length: 376.69 Ft
Page Number: 44

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

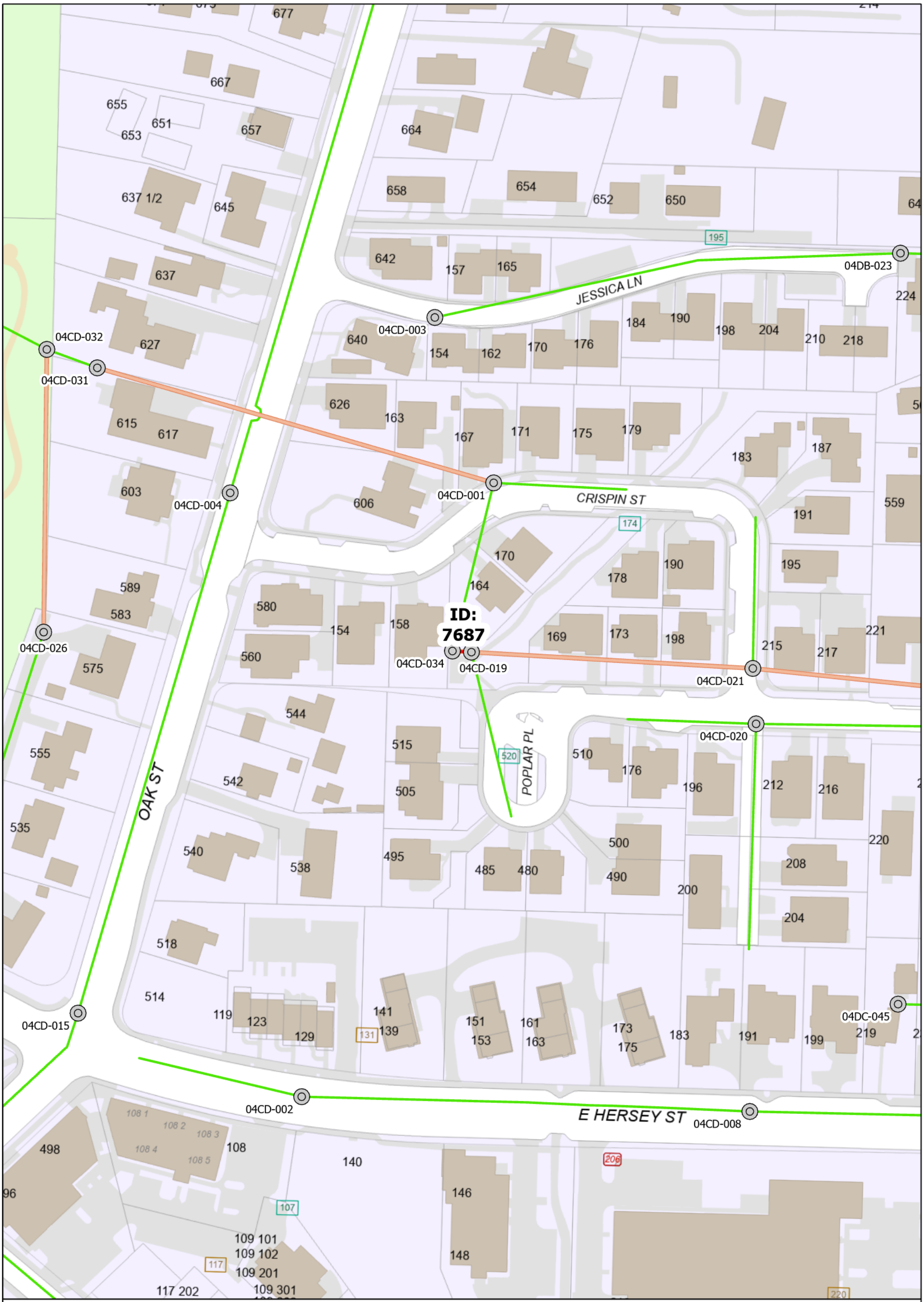
0 125 250 Feet



ID: 5280

Size: 8"
Type: Clay Tile
From: 09DA-015
To: 09DA-017
Length: 83.76 Ft

Page Number: 45



ID: 7687
Size: 0"
Type: Concrete Segments (Unbolted)
From: 04CD-019
To: 04CD-034
Length: 18.2 Ft
Page Number: 46

ssManhole
ssGravityMain
Pipe To be Lined
Pipe To be Lined

N

0 125 250 Feet

Better Together

ID: 5230

Size: 36"
Type: Corrugated Metal
From: 1009
To: 1715
Length: 334.88 Ft
Page Number: 1

N

0 125 250 Feet

Stormwater Inlet
Stormwater Manhole
Stormwater Main
To Be Lined
To Be Lined

Better Together

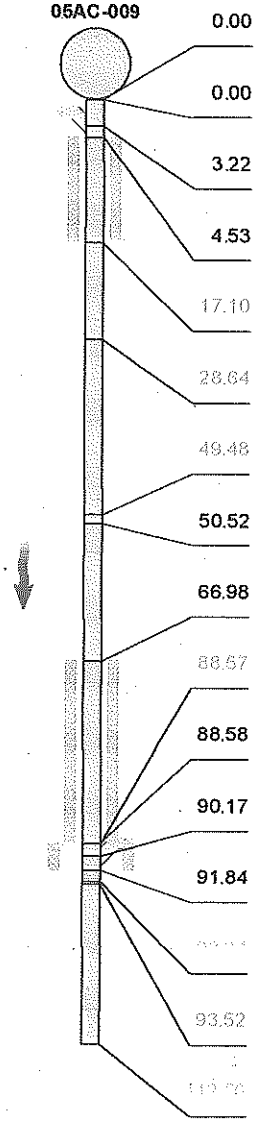
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
12/23/2024			jl	1	1217
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Downstream		155.0 '	155.0 '

City:	ashland	Drainage Area:		Upstream MH:	05AC-009
Street:	greenbriar 1217	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	05AC-016
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Arched	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Pipe (non-reinforced)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:

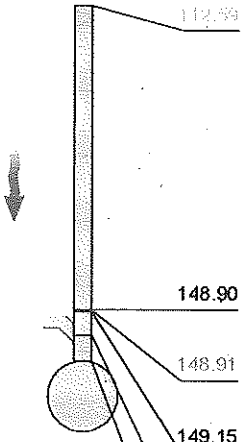


1:850	Distance		Code	Observation	Photo	Grade
05AC-009	0.00		AMH	Manhole / 05AC-009		
	0.00		MWL	Water Level, 10% of the vertical dimension		
	3.22		TB	Tap Break-In at 2 o'clock, 4inch dim / conc		
	4.53	S01	RFJ	Roots Fine Joint from 6 o'clock to 10 o'clock, Start, within 8 inch		
	17.10	F01	RFJ	Roots Fine Joint from 6 o'clock to 10 o'clock, Finish, within 8 inch		M1
	28.64		RFJ	Roots Fine Joint from 7 o'clock to 10 o'clock, within 8 inch		M1
	49.48		RFJ	Roots Fine Joint from 8 o'clock to 3 o'clock, within 8 inch		M1
	50.52		RPZ	Repair Other, within 8 inch / tin conc roof		
	66.98	S02	RFJ	Roots Fine Joint from 10 o'clock to 3 o'clock, Start, within 8 inch		
	88.57	F02	RFJ	Roots Fine Joint from 10 o'clock to 3 o'clock, Finish, within 8 inch		M1
	88.58	S03	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
	90.17		TF	Tap Factory Made at 10 o'clock, 4inch dim / pvc		
	91.84	F03	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
	[illegible]		[illegible]	[illegible]		[illegible]
	93.52		LR	Alignment Right, 10% changed		M1
	119.78		[illegible]	[illegible]		[illegible]

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
12/23/2024			jl	1	1217
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		155.0 '	155.0 '



1:850 Distance	Code	Observation	Photo	Grade
112.59	CM	Crack Multiple from 9 o'clock to 3 o'clock, 12inch defective		3
148.90	MMC	Material Change, Polyvinyl chloride / pvc manifold for outside drop mh		
148.91	JOL	Joint Offset Large, 3inch		52
149.15	MGO	General Observation / about 5 more feet outside drop		
152.00	TF	Tap Factory Made at 2 o'clock, 4inch dim / pvc		
155.01	AMH	Manhole / 05AC-016 drop mh		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
3121	321A	3321	5.0	16.0	21.0	2.5	1.3	1.5

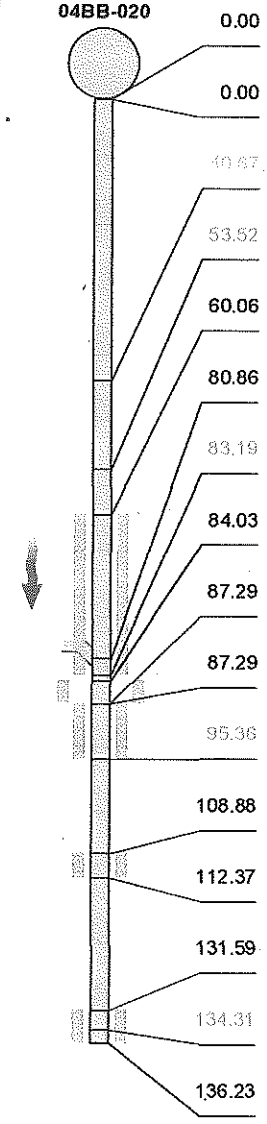
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
12/19/2024			jl	1	1393
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		136.3 '	136.3 '

City:	ashland	Drainage Area:		Upstream MH:	04BB-020
Street:	coventry 1393	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	04BB-007
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:



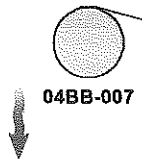
Distance		Code	Observation	Photo	Grade
0.00		AMH	Manhole / 04BB-020		
0.00		MWL	Water Level, 0% of the vertical dimension		
40.67		CM	Crack Multiple from 12 o'clock to 12 o'clock, 30inch defective [illegible]		S3
53.52		RFJ	Roots Fine Joint from 2 o'clock to 4 o'clock, within 8 inch		M1
60.06	S01	RFJ	Roots Fine Joint from 3 o'clock to 9 o'clock, Start, within 8 inch		
80.86		TB	Tap Break-In at 2 o'clock, 6inch dim / conc 6 reduced to 4		
83.19	F01	RFJ	Roots Fine Joint from 3 o'clock to 9 o'clock, Finish, within 8 inch		M1
84.03	S02	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
87.29	F02	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
87.29	S03	RFJ	Roots Fine Joint from 3 o'clock to 9 o'clock, Start, within 8 inch		
95.36	F03	RFJ	Roots Fine Joint from 3 o'clock to 9 o'clock, Finish, within 8 inch		M1
108.88	S04	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
112.37	F04	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
131.59	S05	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
134.31		LU	Alignment Up, 5% changed / fitting		M1
136.23	F05	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
12/19/2024			jl	1	1393
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		136.3 '	136.3 '

1:1029	Distance	Code	Observation	Photo	Grade
	136.30	AMH	Manhole / 04BB-007		



QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
3100	1900	3119	3.0	9.0	12.0	3.0	1.0	1.2

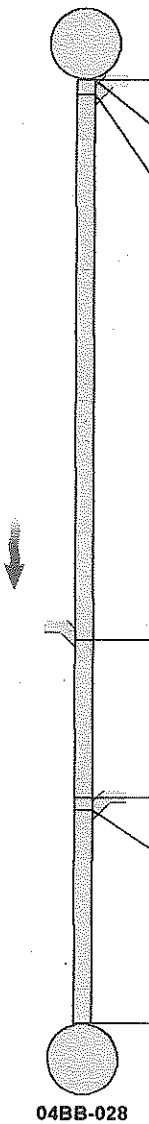
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
12/19/2024			jl	1	1461
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Jetting	Downstream		265.3 '	265.3 '

City:	ashland	Drainage Area:		Upstream MH:	04BB-040
Street:	nevada 1461	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	04BB-028
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	12 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:



1:2003 Distance	Code	Observation	Photo	Grade
0.00	AMH	Manhole / 04BB-040		
0.00	MWL	Water Level, 20% of the vertical dimension		
4.22	TB	Tap Break-In at 10 o'clock, 4inch dim / conc roots and tight rock intrusion		
157.44	TS	Tap Saddle at 3 o'clock, 4inch dim / pvc		
201.79	CL	Crack Longitudinal at 9 o'clock, 4inch defective, 0inch intrusion		S2
205.18	TB	Tap Break-In at 9 o'clock, 4inch dim / clay		
265.32	AMH	Manhole / 04BB-028		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
2100	0000	2100	2.0	0.0	2.0	2.0	0.0	2.0

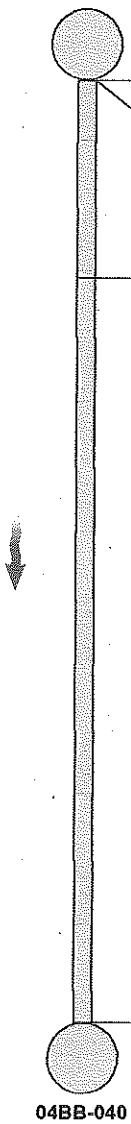
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
12/19/2024			jl	1	1458
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Jetting	Downstream		57.3 '	57.3 '

City:	ashland	Drainage Area:		Upstream MH:	04BB-036
Street:	nevada 1458	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	04BB-040
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	12 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:



1:433	Distance	Code	Observation	Photo	Grade
	0.00	AMH	Manhole / 04BB-036		
	0.00	MWL	Water Level, 20% of the vertical dimension		
	12.04	CL	Crack Longitudinal at 12 o'clock, 4inch defective, 0inch intrusion		S2
	57.26	AMH	Manhole / 04BB-040		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
2100	0000	2100	2.0	0.0	2.0	2.0	0.0	2.0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
12/19/2024			jl	1	1455
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Jetting	Downstream		117.2 '	117.2 '

City:	ashland	Drainage Area:		Upstream MH:	04BC-034
Street:	nevada 1455	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	04BB-044
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	12 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:

1:885	Distance	Code	Observation	Photo	Grade
04BC-034					
	0.00	AMH	Manhole / 04BC-034		
	0.00	MWL	Water Level, 20% of the vertical dimension		
	58.30	TB	Tap Break-In at 10 o'clock, 4inch dim / conc		
	117.19	AMH	Manhole / 04BB-044		
04BB-044					

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	0000	0000	0.0	0.0	0.0	0.0	0.0	0.0

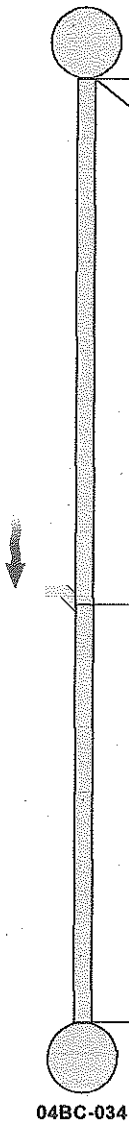
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
12/19/2024			jl	1	1454
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Jetting	Downstream		59.8 '	59.8 '

City:	ashland	Drainage Area:		Upstream MH:	04BC-033
Street:	nevada 1454	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	04BC-034
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	12 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:



1:452	Distance	Code	Observation	Photo	Grade
	0.00	AMH	Manhole / 04BC-033		
	0.00	MWL	Water Level, 20% of the vertical dimension		
	33.39	TS	Tap Saddle at 1 o'clock, 4inch dim / pvc		
	59.82	AMH	Manhole / 04BC-034		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	0000	0000	0.0	0.0	0.0	0.0	0.0	0.0

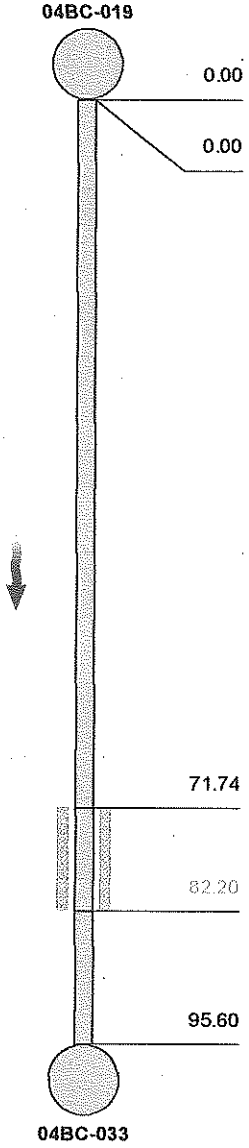
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
12/18/2024			jl	1	1453
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Jetting	Downstream		95.6 '	95.6 '

City:	ashland	Drainage Area:		Upstream MH:	04BC-019
Street:	nevada 1453	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	04BC-033
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	12 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:



1:722	Distance		Code	Observation	Photo	Grade
	0.00		AMH	Manhole / 04BC-019		
	0.00		MWL	Water Level, 10% of the vertical dimension		
	71.74	S01	MCU	Camera Underwater, Start		
	82.20	F01	MCU	Camera Underwater, Finish		M4
	95.60		AMH	Manhole / 04BC-033		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	4200	4200	0.0	8.0	8.0	0.0	4.0	4.0

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Tel:
Fax:
E-mail:

Inspection Report

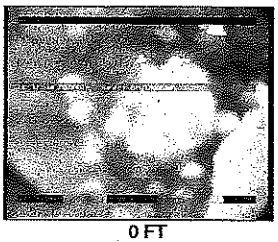
Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
8/9/2017			jeremy		16
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	randy 1551	Use of Sewer		Upstream MH	04bc-006
City	ashland	Drainage Area		Dowstream MH	04bc-032
Loc. details		Flow Control		Dir. of Survey	Downstream
Location Code		Length surveyed	148.86 ft	Section Length	148.86 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	12 inch
Year Rehabilitated		Material	Polyvinyl Chloride
Tape / Media No.	1551	Lining Method	

Add. Information :

1:500	Position	Code	Observation	Grade
04bc-006	0.00	AMH	Upstream Manhole, Survey Begins / mh	
	124.81	RFJ	Roots Fine Joint, from 10 to 02 o'clock, within 8 inches of joint: NO / roots	M 1
04bc-032	148.86	AMH	Downstream Manhole, Survey Ends / mh	



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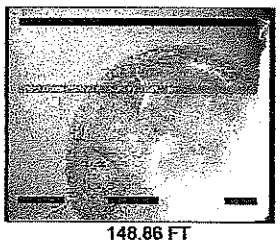


148.86 FT

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	1100	0	1	1	0	1	1

WinCan

Tel:
Fax:
E-mail:

Inspection Report

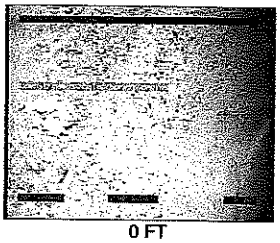
Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
8/7/2017			jeremy		6
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	cambridge 1553	Use of Sewer		Upstream MH	04bc-012
City	ashland	Drainage Area		Dowstream MH	04bc-035
Loc. details		Flow Control		Dir. of Survey	Upstream
Location Code		Length surveyed	134.31 ft	Section Length	134.31 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	12 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	1553	Lining Method	

Add. Information :

1:500	Position	Code	Observation	Grade
04bc-035	0.00	AMH	Downstream Manhole, Survey Begins / mh	
	25.49	TB	Tap Break-In, at 10 o'clock, -, within 8 inches of joint: NO, 4" / conc	
	39.39	TB	Tap Break-In, at 02 o'clock, -, within 8 inches of joint: NO, 4" / conc	
	113.86	RTJ	Roots Tap Joint, at 02 o'clock, 15 %, within 8 inches of joint: YESR / large tap root	M 2
04bc-012	134.31	AMH	Upstream Manhole, Survey Ends / mh	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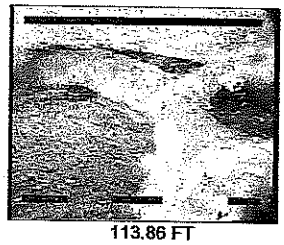
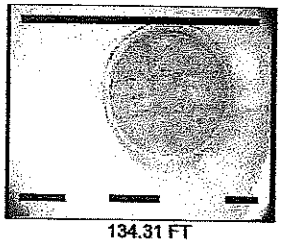

113.86 FT


134.31 FT

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	2100	0	2	2	0	2	2

WinCan

Tel:
Fax:
E-mail:

Inspection Report

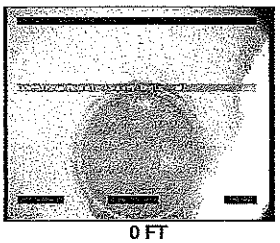
Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
8/7/2017			jeremy		7
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	cambridge 1552	Use of Sewer		Upstream MH	04bc-032
City	ashland	Drainage Area		Dowstream MH	04bc-035
Loc. details		Flow Control		Dir. of Survey	Upstream
Location Code		Length surveyed	142.41 ft	Section Length	142.41 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	12 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	1552	Lining Method	

Add. Information :

1:500	Position	Code	Observation	Grade
04bc-035	0.00	AMH	Downstream Manhole, Survey Begins / mh	
	87.04	RMJ	Roots Medium Joint, from 07 to 02 o'clock, 10 %, within 8 inches of joint: YESR / roots	M 3
04bc-032	142.41	AMH	Upstream Manhole, Survey Ends / mh	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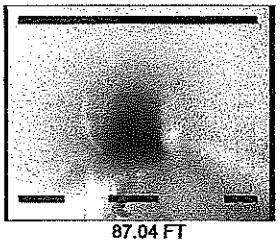
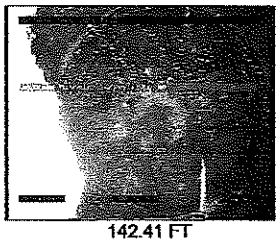

87.04 FT


142.41 FT

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	3100	0	3	3	0	3	3

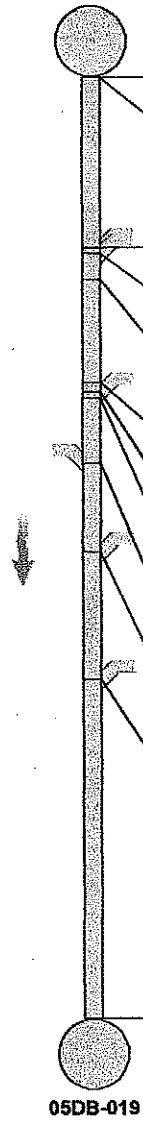
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
8/23/2022			jl	1	1627
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Downstream		360.5 '	360.5 '

City:	ashland	Drainage Area:		Upstream MH:	05DB-005
Street:	maple 1627	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	05DB-019
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:



1:2721 Distance	Code	Observation	Photo	Grade
0.00	AMH	Manhole / 05DB-005		
0.00	MWL	Water Level, 10% of the vertical dimension		
65.33	TS	Tap Saddle at 10 o'clock, 4inch dim / pvc		
67.67	TS	Tap Saddle at 10 o'clock, 4inch dim / pvc		
77.72	RFJ	Roots Fine Joint at 4 o'clock, within 8 inch		M1
117.04	RFJ	Roots Fine Joint at 4 o'clock, within 8 inch		M1
120.70	TBD	Tap Break-In Defective at 10 o'clock, 4inch dim, 2inch defective / conc roots		M3
123.03	RFJ	Roots Fine Joint from 4 o'clock to 8 o'clock, within 8 inch		M1
148.48	TB	Tap Break-In at 2 o'clock, 4inch dim / conc		
182.12	TB	Tap Break-In at 10 o'clock, 4inch dim / conc		
230.99	TB	Tap Break-In at 10 o'clock, 4inch dim / orange		
360.53	AMH	Manhole / 05DB-019		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	3113	3113	0.0	6.0	6.0	0.0	1.5	1.5

WinCan

Tel:
Fax:
E-mail:

Inspection Report

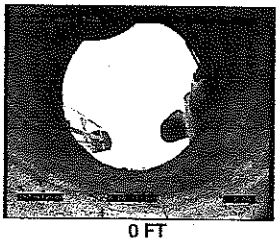
Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
10/9/2017			jeremy		3
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	maple 1646	Use of Sewer	Upstream MH 05db-019
City	ashland	Drainage Area	Dowstream MH 05db-029
Loc. details		Flow Control	Dir. of Survey Downstream
Location Code		Length surveyed 399.41 ft	Section Length 399.41 ft

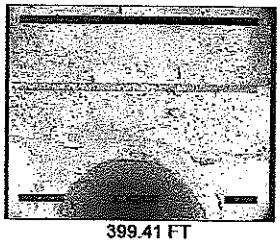
Purpose of Survey		Joint Length	
Year Laid		Dia./Height	6 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	1646	Lining Method	

Add. Information : REPLACE OR LINER Done

1:500	Position		Code	Observation	Grade
05db-019	0.00		AMH	Upstream Manhole, Survey Begins / mh	
	19.90		TF	Tap Factory Made, at 02 o'clock, -, within 8 inches of joint: NO, 4" / conc	
	40.41		TBI	Tap Break-In Intruding, at 10 o'clock, -, -, within 8 inches of joint: NO, 4", 2" / pvc	M 4
	40.47		MSA	Survey Abandoned / cant pass	
	40.47		C	Remarks: ***** Combined *****	
	40.47		C	Remarks: Inspection continued from other side	
	40.47		C	Remarks: Uninspected length: 0.0011 ft	
	40.47 358.94		C	⇧Remarks: Inspection continued from other side	
	40.47 358.94		C	⇧Remarks: ***** Combined *****	
	40.47 358.94		MSA	⇧Survey Abandoned / cant pass	
	40.50 358.91		TFI	⇧Tap Factory Made Intruding, at 10 o'clock, -, -, within 8 inches of joint: NO, 4", 2" / pvc	M 4
	52.41 347.00		TB	⇧Tap Break-In, at 02 o'clock, -, within 8 inches of joint: NO, 4" / orange	
	81.93 317.48	S1	RPR	⇧Repair Pipe Replaced, within 8 inches of joint: YES, Finish / pvc	
	85.92 313.49		TF	⇧Tap Factory Made, at 10 o'clock, -, within 8 inches of joint: NO, 4" / pvc	



0 FT



399.41 FT

WinCan

City :
Tel:
Fax:
Email:

Inspection Report

Date :	Job number :	Weather :	Operator : jeremy	Counter : 3	Section name :
Present :	Vehicle :	Camera :	Preset :	Cleaned : Not Known	Rate :

1:500 Position		Code	Observation	Rate
86.97 312.44	F1	RPR	Repair Pipe Replaced, within 8 inches of joint: YES, Start / pvc	
151.52 247.89		RPZ	Repair Other, within 8 inches of joint: NO / tin and conc	
151.79 247.62		TS	Tap Saddle, at 03 o'clock, -, within 8 inches of joint: NO, 4" / pvc	
163.22 236.19		TB	Tap Break-In, at 10 o'clock, -, within 8 inches of joint: NO, 4" / clay	
164.95 234.46		RPZ	Repair Other, within 8 inches of joint: NO / tin and conc	
227.98 171.43		TF	Tap Factory Made, at 02 o'clock, -, within 8 inches of joint: NO, 6", 4" / conc	
276.83 122.58		H	Hole, from 04 to 08 o'clock, within 8 inches of joint: YES / hole	S 5
277.39 122.02		HVV	Hole Void Visible, from 08 to 09 o'clock, within 8 inches of joint: NO / hole	S 5
279.43 119.98		H	Hole, from 02 to 04 o'clock, within 8 inches of joint: NO / hole	S 5
299.39 100.02		HVV	Hole Void Visible, from 09 to 09 o'clock, within 8 inches of joint: NO / hole	S 5
319.80 79.61		HSV	Hole Soil Visible, from 07 to 09 o'clock, within 8 inches of joint: NO / hole	S 5
326.41 73.00		TB	Tap Break-In, at 09 o'clock, -, within 8 inches of joint: NO, 4" / conc	
347.25 52.16		HVV	Hole Void Visible, from 03 to 05 o'clock, within 8 inches of joint: NO / large hole	S 5
382.47 16.94		TB	Tap Break-In, at 10 o'clock, -, within 8 inches of joint: NO, 4" / orange	
05db-029 399.41 0.00		AMH	Downstream Manhole, Survey Begins / mh	

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	4100	0	4	4	0	4	4

WinCan

Tel:
Fax:
E-mail:

Inspection Report

Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
4/7/2020			jeremy		14
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	oak 2198	Use of Sewer		Upstream MH	04cc-029
City	ashland	Drainage Area		Dowstream MH	04cc-030
Loc. details		Flow Control		Dir. of Survey	Downstream
Location Code		Length surveyed	153.39 ft	Section Length	153.39 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	12 inch
Year Rehabilitated		Material	Clay Tile (not vitrified clay)
Tape / Media No.	2198	Lining Method	

Add. Information :

1:392	Position		Code	Observation	Grade
04cc-029	0.00		AMH	Upstream Manhole, Survey Begins / mh	
	74.39		TFC	Tap Factory Made Capped, at 02 o'clock, -, within 8 inches of joint: NO, 4" / clay	
	84.07		TFC	Tap Factory Made Capped, at 10 o'clock, -, within 8 inches of joint: NO, 4" / clay	
	107.13	S1	LR	Alignment Right, 5 %, Start / sweep	M 1
	114.64		RFJ	Roots Fine Joint, from 08 to 12 o'clock, within 8 inches of joint: YES / roots	M 1
	127.92	S2	RFJ	Roots Fine Joint, from 10 to 02 o'clock, within 8 inches of joint: YES, Start / roots	M 1
	135.47	F2	RFJ	Roots Fine Joint, from 10 to 02 o'clock, within 8 inches of joint: YES, Finish	M 1
	153.39	F1	LR	Alignment Right, 5 %, Finish	M 1
04cc-030	153.39		AMH	Downstream Manhole, Survey Ends / mh	

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	1300	0	3	3	0	1	1

WinCan

Tel:
Fax:
E-mail:

Inspection Report

Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
4/7/2020			jeremy		13
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	0ak st 2197	Use of Sewer		Upstream MH	04cc-028
City	ashland	Drainage Area		Dowstream MH	04cc-029
Loc. details		Flow Control		Dir. of Survey	Downstream
Location Code		Length surveyed	117.84 ft	Section Length	117.84 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	12 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	2197	Lining Method	

Add. Information :

1:308	Position		Code	Observation	Grade
04cc-028	0.00		AMH	Upstream Manhole, Survey Begins / mh	
	6.06		B	Broken, from 02 to 03 o'clock, within 8 inches of joint: YES	S 4
	13.29	S1	RPR	Repair Pipe Replaced, within 8 inches of joint: YES, Start / pvc	
	16.34	F1	RPR	Repair Pipe Replaced, within 8 inches of joint: YES, Finish / pvc	
	24.01		RFJ	Roots Fine Joint, at 01 o'clock, within 8 inches of joint: YES / roots	M 1
	103.57		MMC	Material Change, Clay tile (not vitrified clay) / clay	
04cc-029	117.84		AMH	Downstream Manhole, Survey Ends / roots	

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
4100	1100	4	1	5	4	1	2.5

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Fax:
E-mail:

Inspection Report

Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
4/7/2020			Jeremy		12
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	oak 2196	Use of Sewer		Upstream MH	04cd-027
City	ashland	Drainage Area		Dowstream MH	04cd-028
Loc. details		Flow Control		Dir. of Survey	Downstream
Location Code		Length surveyed	158.20 ft	Section Length	175.51 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	12 inch
Year Rehabilitated		Material	Clay Tile (not vitrified clay)
Tape / Media No.	2196	Lining Method	

Add. Information :

1:406	Position		Code	Observation	Grade
04cd-027	0.00		AMH	Upstream Manhole, Survey Begins / mh	
	21.33	S1	RPR	Repair Pipe Replaced, within 8 inches of joint: YES, Start / pvc	
	35.90	F1	RPR	Repair Pipe Replaced, within 8 inches of joint: YES, Finish / pvc	
04cd-028	158.20		AMH	Downstream Manhole, Survey Ends / mh	

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	0000	0	0	0	0	0	0

Tel:
Fax:
E-mail:

Inspection Report

Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
6/30/2020			jeremy		60
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	crispi 2227	Use of Sewer		Upstream MH	04cd-001
City	ashland	Drainage Area		Dowstream MH	04cd-031
Loc. details		Flow Control		Dir. of Survey	Downstream
Location Code		Length surveyed	395.00 ft	Section Length	395.00 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	8 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	2227	Lining Method	

Add. Information :

1:994

Position	Code	Observation	Grade
0.00	AMH	Upstream Manhole, Survey Begins / mh	
68.40	TF	Tap Factory Made, at 12 o'clock, -, within 8 inches of joint: NO, 4" / conc	
180.54	TB	Tap Break-In, at 12 o'clock, -, within 8 inches of joint: NO, 4" / pvc	
198.80	TF	Tap Factory Made, at 12 o'clock, -, within 8 inches of joint: NO, 4" / conc	
383.73	MGO	General Observation / outside drop mh pipe	
395.00	AMH	Downstream Manhole, Survey Ends / drop mh	

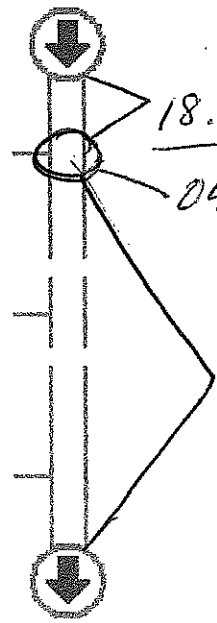
QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	0000	0	0	0	0	0	0

? 18.5

SS #: 2233

Date: 9/13/2010
Street Name: CRISPIN
Total Distance: 185.8
Type of Camera: New Shorty Cam!!
Size of Pipe: 10

Start Manhole Number: 04CD-019
End Manhole Number: ~~04CD-001~~ 04CD-034
Camera Direction: Downstream
Type Of Pipe: CONC



Manhole Number: 04CD-019

(18.2) M.H.

18.2' – SS – 7687

[redacted]

04CD-034

45.4
~~(63.6)~~ CN - Connection - Position: 12
Remark: 6"CONCTEE-90-CONC-ACTIVE-DRY

167.6'

(185.8) EI - End Inspection

Total Distance: 185.8

Manhole Number: 04CD-001

waiting on info from steve

Tel:
Fax:
E-mail:

Inspection Report

Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
11/30/2017			jeremy		42
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

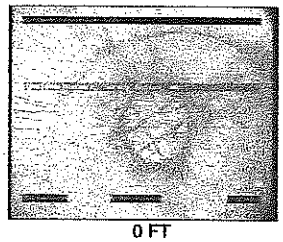
Street123	patterson 7687	Use of Sewer		Upstream MH	04cd-019
City	ashland	Drainage Area		Dowstream MH	04cd-024
Loc. details		Flow Control		Dir. of Survey	Downstream
Location Code		Length surveyed	18.96 ft	Section Length	18.96 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	10 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	7687	Lining Method	

Add. Information :

WEB-LINER

1:500	Position	Code	Observation	Grade
04cd-019	0.00	AMH	Upstream Manhole, Survey Begins / mh	
	2.14	IG	Infiltration Gusher, from 10 to 01 o'clock, within 8 inches of joint: NO	M 5
04cd-024	18.96	AMH	Downstream Manhole, Survey Ends / mh	



0 FT

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	5100	0	5	5	0	5	5

WinCan ✓

Tel:
Fax:
E-mail:

Inspection Report

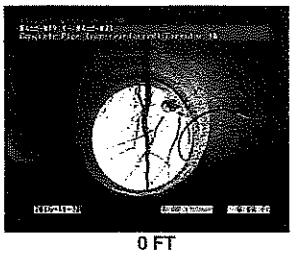
Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
11/30/2015			jeremy	2230	20
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street	patterson 2230	Use of Sewer		Upstream MH	04cd-021
City	ashland	Drainage Area		Dowstream MH	04cd-019
Loc. details		Flow Control		Dir. of Survey	~~Upstream~~ DOWNSTREAM
Location Code		Length surveyed	268.66 ft	Section Length	268.66 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	10 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	2230	Lining Method	

Add. Information : WAST ONLY

1:500	Position	Code	Observation	Grade
04cd-019	0.00	AMH	Downstream Manhole, Survey Begins / mh	
	46.92	IW	Infiltration Weeper, from 01 to 04 o'clock, within 8 inches of joint: YES	M 2
	54.25	IW	Infiltration Weeper, from 01 to 04 o'clock, within 8 inches of joint: YES	M 2
	69.68	IG	Infiltration Gusher, from 07 to 10 o'clock, within 8 inches of joint: YES	M 5
	75.59	CL	Crack Longitudinal, at 09 o'clock, within 8 inches of joint: NO / crack	S 2
	75.59	IR	Infiltration Runner, at 09 o'clock, within 8 inches of joint: NO	M 4
	156.21	IW	Infiltration Weeper, from 03 to 05 o'clock, within 8 inches of joint: YES	M 2
	178.05	HSV	Hole Soil Visible, from 10 to 11 o'clock, within 8 inches of joint: NO / hole	S 5
	194.56	RFJ	Roots Fine Joint, from 04 to 08 o'clock, within 8 inches of joint: YES / roots	M 2
	224.19	IW	Infiltration Weeper, from 02 to 04 o'clock, within 8 inches of joint: YES	M 2
	234.34	CC	Crack Circumferential, from 12 to 06 o'clock, within 8 inches of joint: YES	S 1
	239.83	IW	Infiltration Weeper, from 12 to 03 o'clock, within 8 inches of joint: YES	M 2
	244.24	ID	Infiltration Dripper, from 12 to 04 o'clock, within 8 inches of joint: YES	M 3
	246.96	IW	Infiltration Weeper, from 12 to 04 o'clock, within 8 inches of joint: YES	M 2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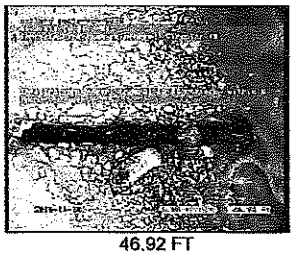
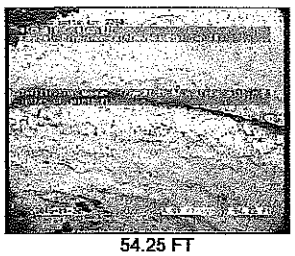

46.92 FT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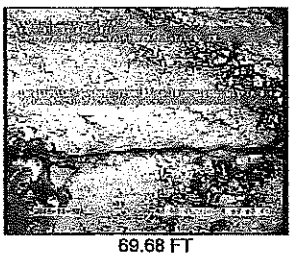
69.68 FT

City :
Tel:
Fax:
Email:

Inspection Report

Date :	Job number :	Weather :	Operator : jeremy	Counter : 20	Section name :
Present :	Vehicle :	Camera :	Preset :	Cleaned : Not Known	Rate :

1:500	Position	Code	Observation	Rate
	251.76	ID	Infiltration Dripper, at 12 o'clock, within 8 inches of joint: NO	M 3
04cd-021	268.66	AMH	Downstream Manhole, Survey Ends / mh	

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
5121	5141	8	29	37	2.67	3.64	3.64

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Tel:
Fax:
E-mail:

Inspection Report

Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
11/30/2017			jeremy		40
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	patterson 2243	Use of Sewer		Upstream MH	04dc-041
City	ashland	Drainage Area		Dowstream MH	04cd-021
Loc. details		Flow Control		Dir. of Survey	Downstream
Location Code		Length surveyed	212.55 ft	Section Length	213.00 ft

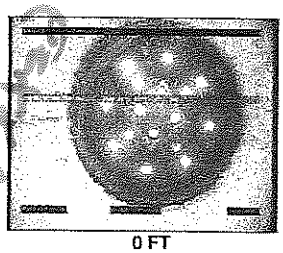
Purpose of Survey		Joint Length	
Year Laid		Dia./Height	10 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	2243	Lining Method	

Add. Information :

SPOT REPAIR

NEOSLINER

1:500	Position	Code	Observation	Grade
04dc-041	0.00	AMH	Upstream Manhole, Survey Begins / mh	
	6.00	TBD	Tap Break-In Defective, at 02 o'clock, -, , within 8 inches of joint: NO, 4" / clay, roots	M 3
	58.82	HVV	Hole Void Visible, from 01 to 05 o'clock, within 8 inches of joint: YES / hole void	S 5
	65.73	HVV	Hole Void Visible, from 03 to 09 o'clock, within 8 inches of joint: YES / whole bottom of pipe missing. large void. 2 foot hole	S 5
	65.99	MSA	Survey Abandoned / hole	
	65.99	C	Remarks: ***** Combined *****	
	65.99	C	Remarks: Inspection continued from other side	
	65.99	C	Remarks: Uninspected length: 0.4462 ft	
	66.43 146.57	C	⇧Remarks: Inspection continued from other side	
	66.43 146.57	C	⇧Remarks: ***** Combined *****	
	66.43 146.57	MSA	⇧Survey Abandoned / cant pass hole	
	66.43 146.57	HVV	⇧Hole Void Visible, from 04 to 08 o'clock, within 8 inches of joint: YES / large hole	S 5
	76.58 136.42	CL	⇧Crack Longitudinal, at 10 o'clock, within 8 inches of joint: YES / crack	S 2
	77.21 135.79	TS	⇧Tap Saddle, at 01 o'clock, -, within 8 inches of joint: NO, 4" / pvc	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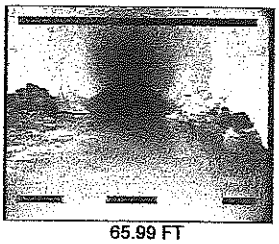
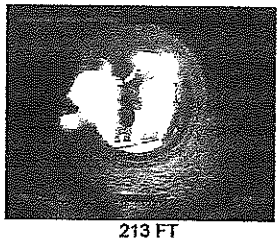

65.99 FT


213 FT

City :
Tel:
Fax:
Email:

Inspection Report

Date :	Job number :	Weather :	Operator : jeremy	Counter : 40	Section name :
Present :	Vehicle :	Camera :	Preset :	Cleaned : Not Known	Rate :

1:500 Position		Code	Observation	Rate
79.39 133.61		CL	Crack Longitudinal, at 09 o'clock, within 8 inches of joint: YES / crack	S 2
85.33 127.67		TS	Tap Saddle, at 10 o'clock, -, within 8 inches of joint: NO, 4" / pvc	
157.43 55.57	S1	RPR	Repair Pipe Replaced, within 8 inches of joint: YES, Finish / pvc	
163.46 49.54	F1	RPR	Repair Pipe Replaced, within 8 inches of joint: YES, Start / pvc	
213.00 0.00		AMH	Upstream Manhole, Survey Begins / mh	

04cd-02

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
[illegible]	2480	10	3	13	5	3	4.33

WinCan

Tel:
Fax:
E-mail:

Inspection Report

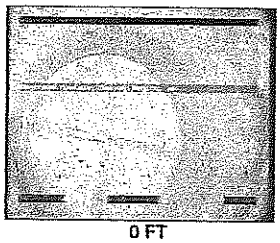
Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
11/30/2017			jeremy		39
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	patterson 2777	Use of Sewer		Upstream MH	04dc-034
City	ashland	Drainage Area		Dowstream MH	04dc-041
Loc. details		Flow Control		Dir. of Survey	Downstream
Location Code		Length surveyed	19.78 ft	Section Length	19.78 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	10 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	2777	Lining Method	

Add. Information :

1:500	Position	Code	Observation	Grade
04dc-034	0.00	AMH	Upstream Manhole, Survey Begins / mh	
04dc-041	19.78	AMH	Downstream Manhole, Survey Ends / mh	



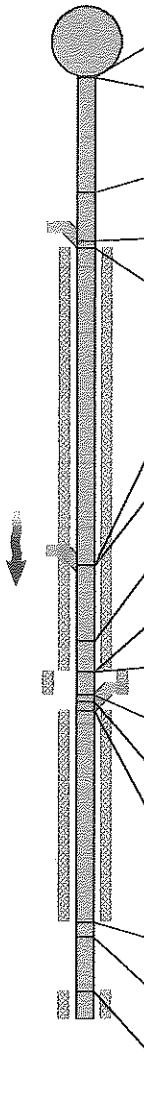
QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	0000	0	0	0	0	0	0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
6/18/2024			JL	1	2261
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		242.9 '	242.9 '

City:	ashland	Drainage Area:		Upstream MH:	09BB-020
Street:	lithia 2261	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09BB-028
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					

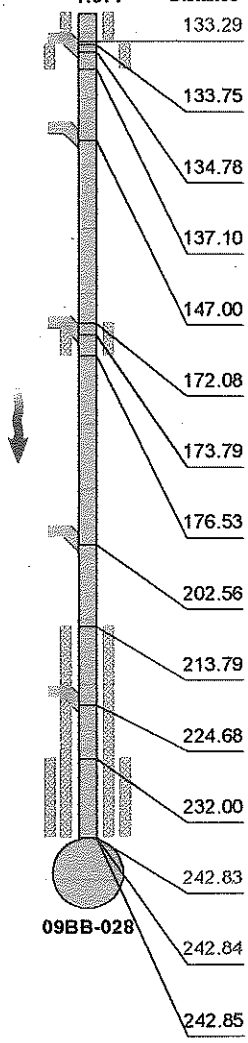


1:977	Distance		Code	Observation	Photo	Grade
09BB-020	0.00		AMH	Manhole / 09BB-020		
	0.00		MWL	Water Level, 0% of the vertical dimension		
	15.86		MMC	Material Change, Clay tile (vitrified clay) / conc to clay		
	22.48		TB	Tap Break-In at 2 o'clock, 4inch dim / conc		
	23.52	S01	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Start, within 8 inch		
	67.09		TB	Tap Break-In at 2 o'clock, 4inch dim / clay		
	67.17		RPZ	Repair Other, within 8 inch / tin conc roof 6x4		
	77.55		HVV	Hole Void Visible from 2 o'clock to 3 o'clock, 8inch defective, 0inch intrusion / above flow line		S5
	81.71	S02	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
	81.71	F01	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Finish, within 8 inch		M1
	84.87	F02	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
	85.80		TSD	Tap Saddle Defective at 10 o'clock, 4inch dim, 0inch defective / abs. roots		M2
	87.11	S03	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
	116.09	F03	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
	118.16		RFJ	Roots Fine Joint from 10 o'clock to 3 o'clock, within 8 inch		M1
	125.59	S04	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Start, within 8 inch		

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
6/18/2024			JL	1	2261
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Downstream		242.9 '	242.9 '



1:977 Distance		Code	Observation	Photo	Grade
133.29	F04	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Finish, within 8 inch		M1
133.75	S05	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
134.78		TS	Tap Saddle at 3 o'clock, 4inch dim / pvc		
137.10	F05	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
147.00		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
172.08	S06	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
173.79		TF	Tap Factory Made at 1 o'clock, 4inch dim / pvc		
176.53	F06	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
202.56		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim		
213.79	S07	RFJ	Roots Fine Joint from 10 o'clock to 3 o'clock, Start, within 8 inch		
224.68		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
232.00	S08	LL	Alignment Left, 5% changed, Start		
242.83	F07	RFJ	Roots Fine Joint from 10 o'clock to 3 o'clock, Finish, within 8 inch		M1
242.84	F08	LL	Alignment Left, 5% changed, Finish		M1
242.85		AMH	Manhole / 09BB-028		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
5100	211C	5121	5.0	25.0	30.0	5.0	1.0	1.2

WinCan ✓

Tel:
Fax:
E-mail:

Inspection Report

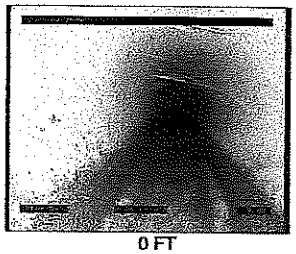
Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
10/17/2016			jeremy		25
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Not Known	

Street123	fairview 2539	Use of Sewer		Upstream MH	09ca-109
City	ashland	Drainage Area		Dowstream MH	09ca-005
Loc. details		Flow Control		Dir. of Survey	Upstream
Location Code		Length surveyed	281.43 ft	Section Length	281.43 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	6 inch
Year Rehabilitated		Material	Polyvinyl Chloride
Tape / Media No.	2539	Lining Method	

Add. Information :

1:500	Position		Code	Observation	Grade
09ca-005	0.00		AMH	Downstream Manhole, Survey Begins / mh	
	93.09		MMC	Material Change, Clay tile (not vitrified clay) / pvc turns into clay	
	104.80		TF	Tap Factory Made, at 10 o'clock, -, within 8 inches of joint: NO, 4" / clay	
	113.99		TF	Tap Factory Made, at 02 o'clock, -, within 8 inches of joint: NO, 4" / clay	
	113.99		CM	Crack Multiple, from 04 to 08 o'clock, within 8 inches of joint: YES / crack	S 3
	132.03		RPZ	Repair Other, within 8 inches of joint: NO / tin conc	
	147.04		TFC	Tap Factory Made Capped, at 10 o'clock, -, within 8 inches of joint: NO, 4" / clay	
	167.32		TFC	Tap Factory Made Capped, at 10 o'clock, -, within 8 inches of joint: NO, 4" / clay	
	169.09		TB	Tap Break-In, at 12 o'clock, -, within 8 inches of joint: NO, 4" / clay	
	173.14		TFC	Tap Factory Made Capped, at 02 o'clock, -, within 8 inches of joint: NO, 4" / clay	
	197.55	S1	RFJ	Roots Fine Joint, from 09 to 04 o'clock, within 8 inches of joint: YES, Start / roots	M 1
	198.54		TB	Tap Break-In, at 02 o'clock, -, within 8 inches of joint: NO, 4" / orange	
	208.44	F1	RFJ	Roots Fine Joint, from 09 to 04 o'clock, within 8 inches of joint: YES, Finish	M 1
	213.80		RFJ	Roots Fine Joint, from 07 to 09 o'clock, within 8 inches of joint: YES / roots	M 1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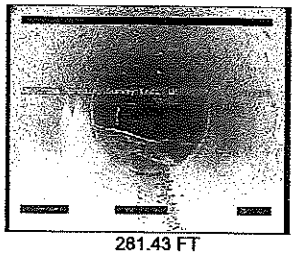

281.43 FT

City : ashland

WinCan

City :
Tel:
Fax:
Email:

Inspection Report

Date :	Job number :	Weather :	Operator : jeremy	Counter : 25	Section name :
Present :	Vehicle :	Camera :	Preset :	Cleaned : Not Known	Rate :

1:500 Position		Code	Observation	Rate
214.74		TFC	Tap Factory Made Capped, at 11 o'clock, -, within 8 inches of joint: NO, 4" / clay	
216.33		TFC	Tap Factory Made Capped, at 02 o'clock, -, within 8 inches of joint: NO, 4" / clay	
218.09	S2	RFJ	Roots Fine Joint, from 08 to 04 o'clock, within 8 inches of joint: YES, Start / roots	M 1
220.82		TBD	Tap Break-In Defective, at 03 o'clock, -, , within 8 inches of joint: NO, 4" / orange roots	M 3
223.00	F2	RFJ	Roots Fine Joint, from 08 to 04 o'clock, within 8 inches of joint: YES, Finish	M 1
255.50	S3	RFJ	Roots Fine Joint, from 07 to 05 o'clock, within 8 inches of joint: YES, Start / roots	M 1
255.50		TBD	Tap Break-In Defective, at 10 o'clock, -, , within 8 inches of joint: NO, 4", 4" / roots	M 3
263.56	F3	RFJ	Roots Fine Joint, from 07 to 05 o'clock, within 8 inches of joint: YES, Finish	M 1
263.56		TFC	Tap Factory Made Capped, at 10 o'clock, -, within 8 inches of joint: NO, 4" / clay	
269.67		TFC	Tap Factory Made Capped, at 02 o'clock, -, within 8 inches of joint: NO, 4" / clay	
277.06		HSV	Hole Soil Visible, from 04 to 05 o'clock, within 8 inches of joint: NO, 4ft / hole in pipe	S 5
278.50		TB	Tap Break-In, at 02 o'clock, -, within 8 inches of joint: NO, 4" / orange	
09ca-109 281.43		AMH	Upstream Manhole, Survey Ends / LH	

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
5131	3214	8	10	18	4	1.67	2.25

#11

ID
2574

#11
2597
09CC-005
442
440
434
432
2600
09CD-039
465
469
445
433
2574
425
2601
2575
JENNIFER ST
09CD-023
09CD-022
HEATHER ST
462
2576
2602
COURTNEY ST
09CD-101
09CD-102
09CD-021
444
434
424
414

Tel:
Fax:
E-mail:

Inspection Report

Date	P/O. No.	Weather	Surveyor's Name	Pipe Segment Reference	Section No.
3/14/2017			jeremy		23
Certificate No.	**Survey Customer**	**System Owner**	**Date Cleaned**	**Pre-Cleaning**	**Sewer Category**
1				Heavy Cleaning	

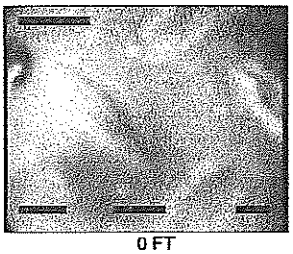
Street123	jennifer 2574	Use of Sewer		Upstream MH	09cd-039
City	ashland	Drainage Area		Dowstream MH	09cd-023
Loc. details		Flow Control		Dir. of Survey	Downstream
Location Code		Length surveyed	126.09 ft	Section Length	126.10 ft

Purpose of Survey		Joint Length	
Year Laid		Dia./Height	6 inch
Year Rehabilitated		Material	Concrete Pipe (non-reinforced)
Tape / Media No.	2574	Lining Method	

Add. Information :

WET

1:500	Position		Code	Observation	Grade
09cd-039	0.00		AMH	Downstream Manhole, Survey Begins / mh	
	56.52		RFJ	Roots Fine Joint, from 09 to 03 o'clock, within 8 inches of joint: YES / roots	M 1
	67.50		RMJ	Roots Medium Joint, from 10 to 04 o'clock, 40 %, within 8 inches of joint: YESR / roots, possible service??	M 3
	74.94		RFJ	Roots Fine Joint, from 10 to 02 o'clock, within 8 inches of joint: YES / roots	M 1
	97.63		LU	Alignment Up, 25 %	M 4
	105.00		MSA	Survey Abandoned / nearly vertical, cant pass	
	105.00		C	Remarks: ***** Combined *****	
	105.00		C	Remarks: Inspection continued from other side	
	105.00		C	Remarks: Uninspected length: 0.0069 ft	
	105.01 21.09		C	⇑Remarks: Inspection continued from other side	
	105.01 21.09		C	⇑Remarks: ***** Combined *****	
	105.01 21.09		MSA	⇑Survey Abandoned / deflection	
	105.01 21.09		LD	⇑Alignment Down, 50 % / cant pass	M 4
	107.17 18.93	S1	RPR	⇑Repair Pipe Replaced, within 8 inches of joint: YES, Finish / pvc	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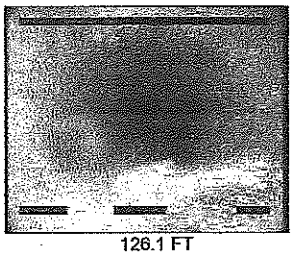

126.1 FT

City :
Tel:
Fax:
Email:

Inspection Report

Date :	Job number :	Weather :	Operator : jeremy	Counter : 23	Section name :
Present :	Vehicle :	Camera :	Preset :	Cleaned : Heavy Cleaning	Rate :

1:500	Position		Code	Observation	Rate
	115.95 10.15		TS	Tap Saddle, at 02 o'clock, -, within 8 inches of joint: NO, 4" / pvc	
	119.10 7.00	F1	RPR	Repair Pipe Replaced, within 8 inches of joint: YES, Start / pvc	
	124.10 2.00		RMJ	Roots Medium Joint, from 09 to 03 o'clock, 15 %, within 8 inches of joint: YESR / roots	M 3
09cd-023	126.10 0.00		AMH	Upstream Manhole, Survey Begins / mh	

QSR	QMR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	4131	0	9	9	0	2.25	2.25

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
2/15/2022			MC	1	2619
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Downstream		250.9 '	250.9 '

City:	ashland	Drainage Area:		Upstream MH:	16BA-013
Street:	Ashland St 2619	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09CD-036
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Other	Sewer Use:	Sanitary Sewage Pipe	Total gallons used:	0.0
Pipe size:	6 x 6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:

1:1894	Distance	Code	Observation	Photo	Grade
16BA-013					
	0.0	MWL	Water Level, 5% of the vertical dimension		
	0.0	AMH	Manhole / 16BA-013		
	113.4	TBA	Tap Break-in Activity at 9 o'clock, dia/height: 4inch / clay		
	118.6	TBA	Tap Break-in Activity at 9 o'clock, dia/height: 4inch / clay		
	121.4	TBA	Tap Break-in Activity at 3 o'clock, dia/height: 4inch / clay		
	157.5	BVV	Broken,Void Visible at 2 o'clock / 2"		S5
	169.1	RPR	Point Repair Replacement / pvc, 3' each way from center		
	197.7	TBA	Tap Break-in Activity at 3 o'clock, dia/height: 4inch / clay		
	250.9	AMH	Manhole / 09CD-036		
09CD-036					

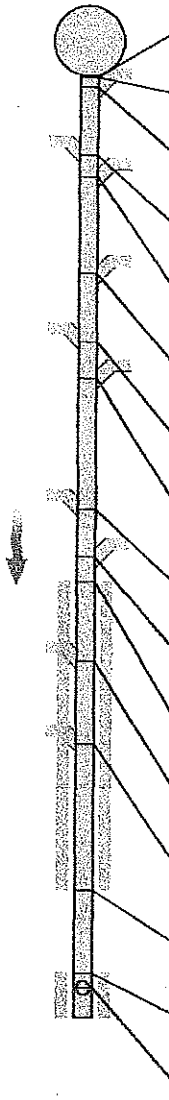
QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
5100	0000	5100	5.0	0.0	5.0	5.0	0.0	5.0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
2/8/2022			jl	1	3323
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		335.8 '	335.8 '

City:	ashland	Drainage Area:		Upstream MH:	09DB-020
Street:	siskiyou 3323	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09DB-021
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Other	Sewer Use:		Total gallons used:	0.0
Pipe size:	8 x 8 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					

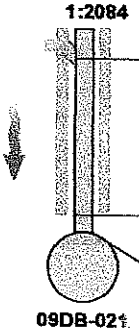


1:2084	Distance		Code	Observation	Photo	Grade
09DB-020	0.00		AMH	Manhole / 09DB-020		
	0.00		MWL	Water Level, 10% of the vertical dimension		
	3.24		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
	23.27		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
	29.44		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
	58.05		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
	78.09		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
	88.66		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
	127.02		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
	141.24		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
	148.55	S01	DAGS	Deposits Attached Grease, 5% of cross sectional area from 4 o'clock to 8 o'clock, Start		
	171.58		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
	195.91		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
	238.62	F01	DAGS	Deposits Attached Grease, 5% of cross sectional area from 4 o'clock to 8 o'clock, Finish		IM2
	263.06	S02	LL	Alignment Left, 5% changed, Start / sweep		
	267.20		TS	Tap Saddle at 12 o'clock, 4inch dim / pvc		

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
2/8/2022			jl	1	3323
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		335.8 '	335.8 '



1:2084 Distance		Code	Observation	Photo	Grade
284.99		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
330.59	F02	LL	Alignment Left, 5% changed, Finish / sweep		M
335.80		AMH	Manhole / 09DB-021		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	2B1A	2B1A	0.0	50.0	50.0	0.0	1.6	1.6

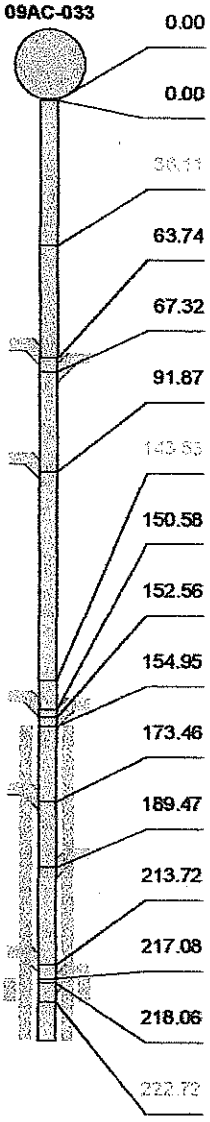
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
2/8/2022			jl	1	3104
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		399.0 '	399.0 '

City:	ashland	Drainage Area:		Upstream MH:	09AC-033
Street:	siskiyou 3104	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09DB-020
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Other	Sewer Use:		Total gallons used:	0.0
Pipe size:	0 x 8 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:

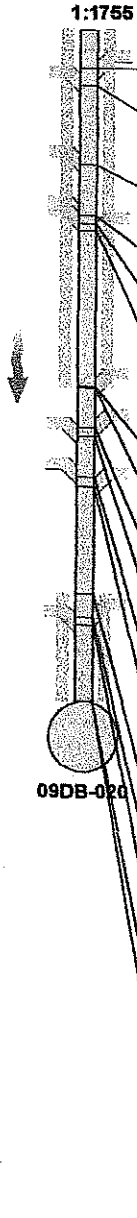


1:1755	Distance		Code	Observation	Photo	Grade
09AC-033	0.00		AMH	Manhole / 09AC-033		
	0.00		MWL	Water Level, 10% of the vertical dimension		
	36.11		RFJ	Roots Fine Joint from 7 o'clock to 8 o'clock, within 8 inch		M1
	63.74		TFC	Tap Factory Made Capped at 3 o'clock, 4inch dim / clay		
	67.32		TFC	Tap Factory Made Capped at 9 o'clock, 4inch dim		
	91.87		TFC	Tap Factory Made Capped at 3 o'clock, 4inch dim / clay		
	143.53		CM	Crack Multiple from 11 o'clock to 1 o'clock		S3
	150.58		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
	152.56		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
	154.95	S01	DAGS	Deposits Attached Grease, 5% of cross sectional area from 4 o'clock to 8 o'clock, within 8 inch, Start		
	173.46		TF	Tap Factory Made at 3 o'clock, 4inch dim / clay		
	189.47		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
	213.72		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
	217.08	S02	RFJ	Roots Fine Joint from 3 o'clock to 9 o'clock, Start, within 8 inch		
	218.06		TFC	Tap Factory Made Capped at 9 o'clock, 4inch dim / clay		
	222.72	F02	RFJ	Roots Fine Joint from 3 o'clock to 9 o'clock, Finish, within 8 inch		M1

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
2/8/2022			jl	1	3104
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		399.0 '	399.0 '



Distance		Code	Observation	Photo	Grade
242.27		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
246.46		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
266.01		TB	Tap Break-In at 2 o'clock, 4inch dim / conc		
278.57		TB	Tap Break-In at 2 o'clock, 4inch dim / clay		
280.75		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
282.37		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
320.96		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
321.32	F01	DAGS	Deposits Attached Grease, 5% of cross sectional area from 4 o'clock to 8 o'clock, within 8 inch, Finish		M2
331.12		TS	Tap Saddle at 10 o'clock, 4inch dim / pvc		
333.25		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
343.36		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
345.85		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
372.22	S03	DAGS	Deposits Attached Grease, 5% of cross sectional area from 4 o'clock to 8 o'clock, Start		
377.99		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
379.97		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
398.98	F03	DAGS	Deposits Attached Grease, 5% of cross sectional area from 4 o'clock to 8 o'clock, Finish		M2
398.98		AMH	Manhole / 09DB-020		

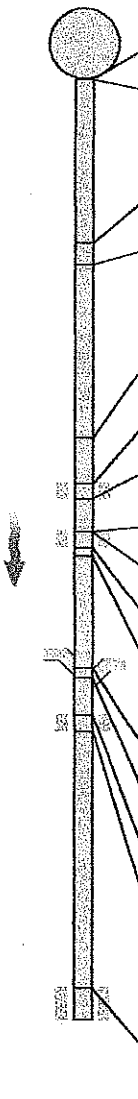
QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
3100	2F12	312F	3.0	78.0	81.0	3.0	2.0	2.0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
9/12/2023			jl	1	3115
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Downstream		331.1 '	331.1 '

City:	ashland 3115	Drainage Area:		Upstream MH:	09AD-004
Street:	e. main 3115	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09AD-005
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	8 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					



1:1467	Distance		Code	Observation	Photo	Grade
09AD-004	0.00		AMH	Manhole / 09AD-004		
	0.00		MWL	Water Level, 10% of the vertical dimension		
	33.75		HVV	Hole Void Visible from 4 o'clock to 5 o'clock		S5
	38.34		HVV	Hole Void Visible from 1 o'clock to 3 o'clock		S5
	74.21		HVV	Hole Void Visible from 3 o'clock to 5 o'clock		S5
	83.64	S01	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
	86.81	F01	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
	83.61		HV	Hole from 4 o'clock to 5 o'clock		S3
	93.73	S02	CM	Crack Multiple from 11 o'clock to 4 o'clock, Start		
	97.03	F02	CM	Crack Multiple from 11 o'clock to 4 o'clock, Finish		S3
	98.72		SAM	Surface Aggregate Missing from 4 o'clock to 6 o'clock / soon will be hole		S4
	121.74		TF	Tap Factory Made at 3 o'clock, 4inch dim / conc		
	123.67		TF	Tap Factory Made at 9 o'clock, 4inch dim / conc		
	131.54	S03	CL	Crack Longitudinal at 3 o'clock, Start		
	134.82	F03	CL	Crack Longitudinal at 3 o'clock, Finish		S2
	187.80	S04	CM	Crack Multiple from 10 o'clock to 3 o'clock, Start		

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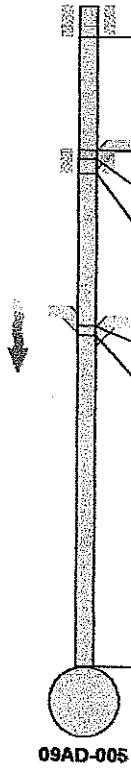
Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
9/12/2023			jl	1	3115
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		331.1 '	331.1 '



1:1467 Distance		Code	Observation	Photo	Grade
100.65	P04	CM	Crack Multiple from 10 o'clock to 3 o'clock, Finish		S3
224.25	S05	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
225.91		TS	Tap Saddle at 10 o'clock, 4inch dim / pvc		
228.95	F05	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
260.70		TF	Tap Factory Made at 2 o'clock, 4inch dim / conc		
262.61		TF	Tap Factory Made at 10 o'clock, 4inch dim / conc		
331.15		AMH	Manhole / 09AD-005		

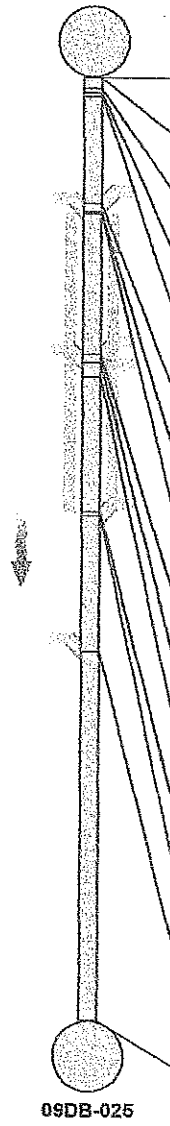
QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
5341	0000	5341	36.0	0.0	36.0	3.6	0.0	3.6

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
10/18/2021			jl	1	3399
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		238.7 '	238.7 '

City:	ashland	Drainage Area:		Upstream MH:	09DB-010
Street:	liberty 3399	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09DB-025
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					



Distance		Code	Observation	Photo	Grade
0.00		AMH	Manhole / 09DB-010		
0.00		MWL	Water Level, 10% of the vertical dimension		
3.00		MSC	Shape or Size Change, 6inch dim, 8inch dim / 8x6 pvc ecc		
4.00		RFJ	Roots Fine Joint from 7 o'clock to 5 o'clock, within 8 inch	M1	
5.00		MMC	Material Change, Clay tile (vitrified clay) / pvc out of mh changes to clay		
32.25		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / roots coming in		
34.14		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / roots		
34.72	S02	RMJ	Roots Medium Joint from 8 o'clock to 4 o'clock, 15% lost, Start, within 8 inch		
70.19		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim		
73.42		TFD	Tap Factory Made Defective at 2 o'clock, 4inch dim, 6inch defective / full of roots	M2	
76.05		TB	Tap Break-In at 10 o'clock, 4inch dim / pvc		
110.06	S03	RMJ	Roots Medium Joint from 8 o'clock to 4 o'clock, 15% lost, Finish, within 8 inch	M3	
111.10		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / roots		
145.55		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim		
238.72		AMH	Manhole / 09DB-025		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	3B21	3B21	0.0	48.0	48.0	0.0	2.8	2.8

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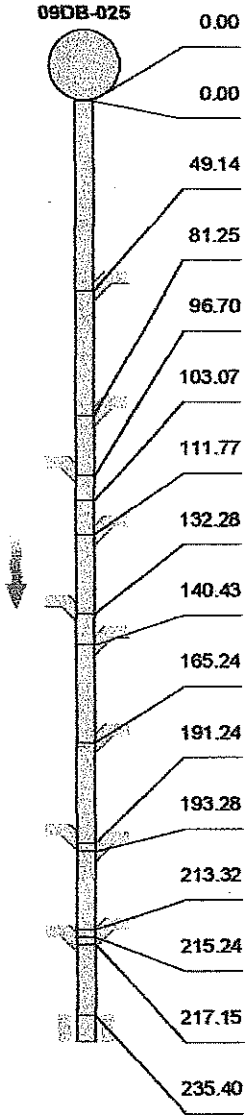
Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
3/1/2022			jl	1	3397
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Downstream		384.1 '	384.1 '

City:	ashland	Drainage Area:		Upstream MH:	09DB-025
Street:	siskiyou 3397	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09DB-021
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Other	Sewer Use:		Total gallons used:	0.0
Pipe size:	8 x 8 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					

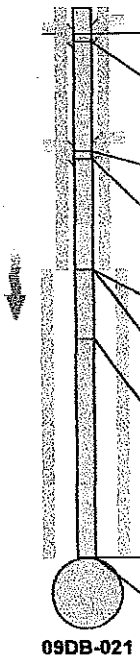


Distance		Code	Observation	Photo	Grade
0.00		AMH	Manhole / 09DB-025		
0.00		MWL	Water Level, 30% of the vertical dimension		
49.14		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
81.25		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
96.70		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
103.07		RPZ	Repair Other / tin conc roof		
111.77		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
132.28		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
140.43		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
165.24		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
191.24		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
193.28		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
213.32		RPZ	Repair Other / tin conc roof		
215.24		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
217.15		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
235.40	S01	DAGS	Deposits Attached Grease, 5% of cross sectional area from 4 o'clock to 8 o'clock, Start		

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
3/1/2022			jl	1	3397
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Downstream		384.1 '	384.1 '



Distance		Code	Observation	Photo	Grade
249.23		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
251.08		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
279.33		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
281.45		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
309.83	F01	DAGS	Deposits Attached Grease, 5% of cross sectional area from 4 o'clock to 8 o'clock, Finish		M2
309.83	S02	LR	Alignment Right, 5% changed, Start / sweep		
327.75		HVV	Hole Void Visible from 7 o'clock to 9 o'clock, 6inch defective / large void outside of pipe		S5
384.14	F02	LR	Alignment Right, 5% changed, Finish / sweep		M1
384.14		AMH	Manhole / 09DB-021		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
5100	2B1B	512B	5.0	45.0	50.0	5.0	1.5	1.6

#15

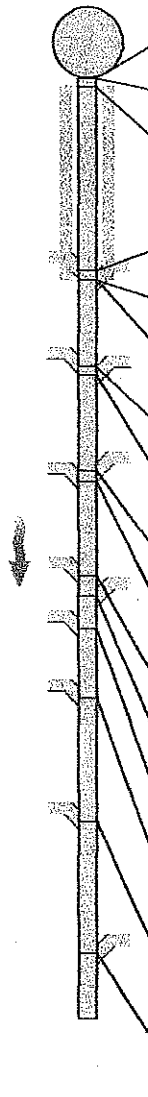
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
3/1/2022			jl	1	3441
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Downstream		441.4 '	441.4 '

City:	ashland	Drainage Area:		Upstream MH:	09DA-003
Street:	siskiyou 3441	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09DB-025
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Other	Sewer Use:		Total gallons used:	0.0
Pipe size:	8 x 8 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:



1:1647 Distance		Code	Observation	Photo	Grade
0.00		AMH	Manhole / 1		
0.00		MWL	Water Level, 40% of the vertical dimension		
2.00	S01	DAGS	Deposits Attached Grease, 5% of cross sectional area from 3 o'clock to 9 o'clock, within 8 inch, Start		
44.78		TFD	Tap Factory Made Defective at 2 o'clock, 4inch dim, 2inch defective / clay roots		M2
46.93		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
46.93	F01	DAGS	Deposits Attached Grease, 5% of cross sectional area from 3 o'clock to 9 o'clock, within 8 inch, Finish		M2
66.92		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
68.95		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
91.09		TB	Tap Break-In at 10 o'clock, 4inch dim / steel		
93.69		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
115.47		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
120.27		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
127.87		TS	Tap Saddle at 2 o'clock, 4inch dim / pvc		
143.89		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
172.36		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
202.82		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		

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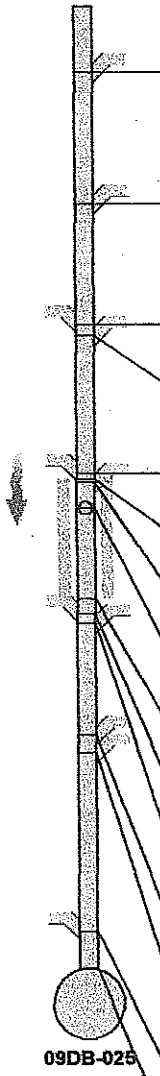
Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
3/1/2022			jl	1	3441
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		441.4 '	441.4 '



1:1647 Distance		Code	Observation	Photo	Grade
233.54		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
263.98		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
292.18		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
294.63		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
326.68		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
328.01	S02	IS	Infiltration Stain from 4 o'clock to 9 o'clock, Start / at joints		
328.80		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
334.84		TB	Tap Break-In at 12 o'clock, 2inch dim / steel		
355.66	F02	IS	Infiltration Stain from 4 o'clock to 9 o'clock, Finish / at joints		
359.30		TF	Tap Factory Made at 2 o'clock, 47inch dim / clay		
361.31		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
387.45		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
391.57		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
432.82		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
441.40		AMH	Manhole / 09DB-025		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	2A00	2A00	0.0	20.0	20.0	0.0	2.0	2.0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
9/27/2021			jl	1	5280
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		85.0 '	85.0 '

City:	ashland	Drainage Area:		Upstream MH:	09DA-015
Street:	siskiyou 5280	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09DA-017
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:

1:642	Distance	Code	Observation	Photo	Grade
09DA-015					
	0.00	AMH	Manhole / 09DA-015		
	0.00	MWL	Water Level, 40% of the vertical dimension		
	22.90	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
	85.00	AMH	Manhole / 09DA-017		
09DA-017					

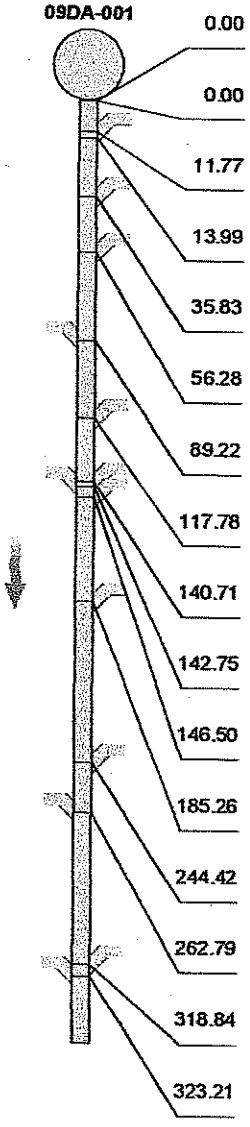
QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	0000	0000	0.0	0.0	0.0	0.0	0.0	0.0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
2/14/2022			jl	1	5268
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		376.5 '	376.5 '

City:	ashland	Drainage Area:		Upstream MH:	09DA-001
Street:	siskiyou 5268	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09DA-003
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Other	Sewer Use:		Total gallons used:	0.0
Pipe size:	8 x 8 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					

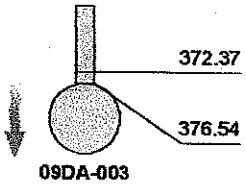


Distance	Code	Observation	Photo	Grade
0.00	AMH	Manhole / 09DA-001		
0.00	MWL	Water Level, 30% of the vertical dimension		
11.77	TF	Tap Factory Made at 10 o'clock, 4inch dim / pvc		
13.99	MMC	Material Change, Clay tile (vitrified clay) / pvc out of mh to clay		
35.83	TF	Tap Factory Made at 10 o'clock, 4inch dim / abs stubbed in to clay wye		
56.28	TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
89.22	TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
117.78	TB	Tap Break-In at 10 o'clock, 4inch dim / clay		
140.71	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
142.75	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
146.50	TB	Tap Break-In at 10 o'clock, 4inch dim / clay		
185.26	TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
244.42	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
262.79	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
318.84	TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
323.21	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
2/14/2022			jl	1	5268
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		376.5 '	376.5 '

1:2625	Distance	Code	Observation	Photo	Grade
	372.37	MMC	Material Change, Polyvinyl chloride / pvc into MH		
	376.54	AMH	Manhole / 09DA-003		

09DA-003

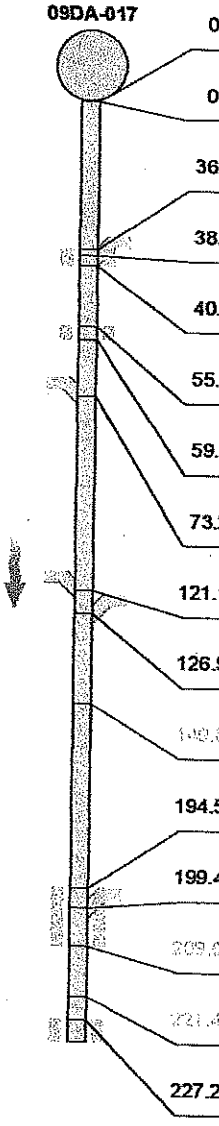
QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	0000	0000	0.0	0.0	0.0	0.0	0.0	0.0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
2/14/2022			jl	1	3454
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		412.2 '	412.2 '

City:	ashland	Drainage Area:		Upstream MH:	09DA-017
Street:	siskiyou 3454	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09DA-001
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Other	Sewer Use:		Total gallons used:	0.0
Pipe size:	8 x 8 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					

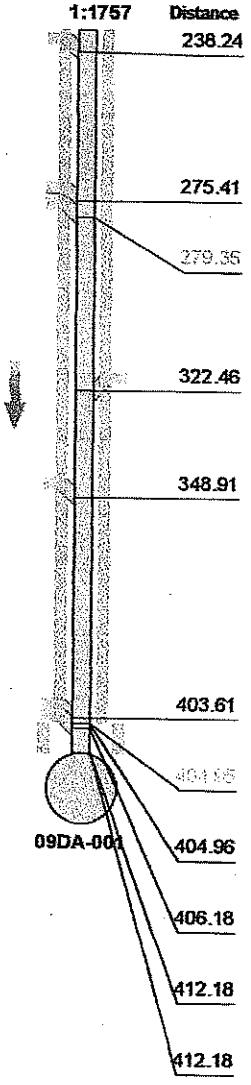


1:1757	Distance		Code	Observation	Photo	Grade
09DA-017	0.00		AMH	Manhole / 09DA-017		
	0.00		MWL	Water Level, 30% of the vertical dimension		
	36.79	S01	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
	38.40		TF	Tap Factory Made at 10 o'clock, 4inch dim / pvc		
	40.91	F01	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
	55.86	S02	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
	59.16	F02	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
	73.24		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
	121.14		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
	126.94		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
	140.07		CC	Crack Circumferential from 7 o'clock to 9 o'clock	S1	
	194.51	S03	RFJ	Roots Fine Joint from 8 o'clock to 4 o'clock, Start, within 8 inch		
	199.45		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
	209.62	F03	RFJ	Roots Fine Joint from 8 o'clock to 4 o'clock, Finish, within 8 inch	M1	
	221.42		RFJ	Roots Fine Joint from 7 o'clock to 4 o'clock, within 8 inch	M1	
	227.29	S04	RFJ	Roots Fine Joint from 7 o'clock to 4 o'clock, Start, within 8 inch		

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
2/14/2022			jl	1	3454
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		412.2 '	412.2 '



Distance		Code	Observation	Photo	Grade
238.24		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
275.41		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay roots		
279.35		TFD	Tap Factory Made Defective at 2 o'clock, 4inch dim, 2inch defective / conc, roots	M2	
322.46		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
348.91		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
403.61		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
404.55	F04	SRJ	Roots Pipe Joint from 7 o'clock to 4 o'clock, Finish, within 8 inch	M1	
404.96	S05	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
406.18		TF	Tap Factory Made at 2 o'clock, 4inch dim / pvc		
412.18	F05	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
412.18		AMH	Manhole / 09DA-001		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
1100	211G	211G	1.0	42.0	43.0	1.0	1.0	1.0

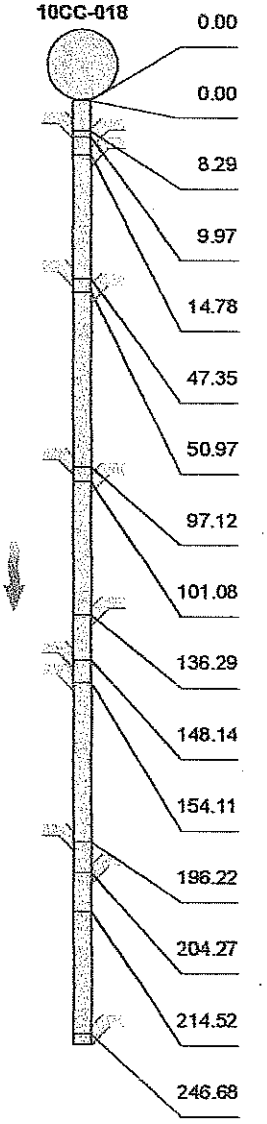
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
9/8/2021			jl	1	3576
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		292.4 '	292.4 '

City:	ashland	Drainage Area:		Upstream MH:	10CC-018
Street:	siskiyou 3576	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	10CC-021
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:

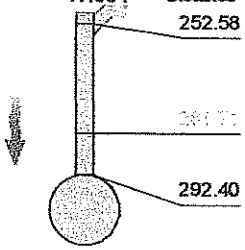


1:1884 Distance	Code	Observation	Photo	Grade
0.00	AMH	Manhole / 10CC-018		
0.00	MWL	Water Level, 10% of the vertical dimension		
8.29	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
9.97	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
14.78	TB	Tap Break-In at 11 o'clock, 4inch dim / orange		
47.35	TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
50.97	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
97.12	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
101.08	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
136.29	TB	Tap Break-In at 10 o'clock, 4inch dim / clay		
148.14	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
154.11	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
196.22	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
204.27	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
214.52	RPZ	Repair Other / tin conc		
246.68	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
9/8/2021			jl	1	3576
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Downstream		292.4 '	292.4 '



Distance	Code	Observation	Photo	Grade
252.58	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
284.72	CRM	Crack Multiple from 10 o'clock to 2 o'clock, 8inch defective, Roots Intrusion		4.3
292.40	AMH	Manhole / 10CC-021		

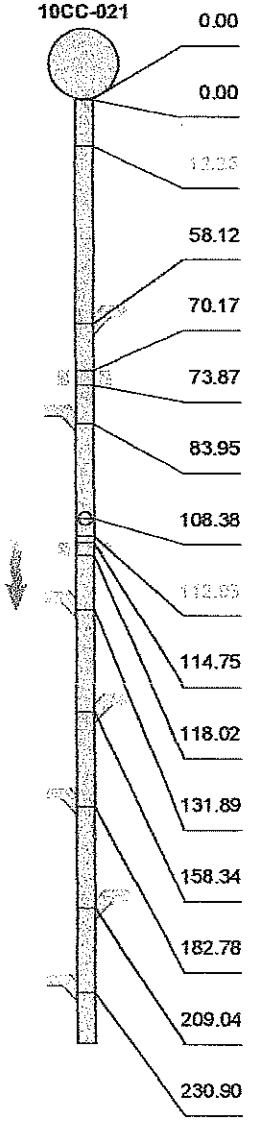
QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
3100	0000	3100	3.0	0.0	3.0	3.0	0.0	3.0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
9/9/2021			jl	1	3475
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		523.3 '	523.3 '

City:	ashland	Drainage Area:		Upstream MH:	10CC-021
Street:	siskiyou 3475	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	09DA-015
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					

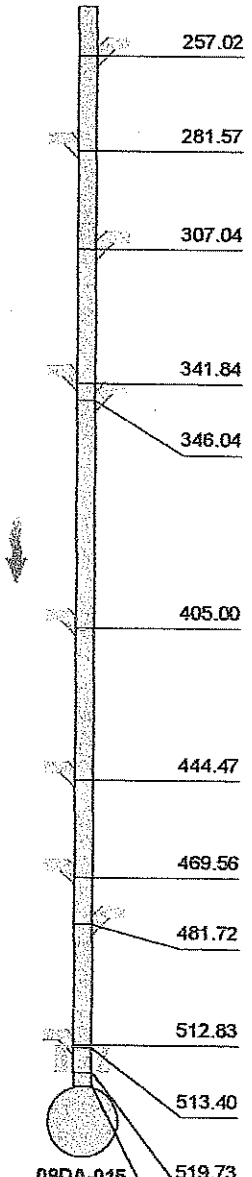


1:1842	Distance		Code	Observation	Photo	Grade
10CC-021	0.00		AMH	Manhole / 1		
	0.00		MWL	Water Level, 10% of the vertical dimension		
	12.35		RFJ	Route Fine Joint from 10 o'clock to 2 o'clock, within 8 inch		M1
	58.12		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
	70.17	S01	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
	73.87	F01	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
	83.95		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
	108.38		TB	Tap Break-In at 12 o'clock, 4inch dim / clay		
	112.85		RFJ	Route Fine Joint from 11 o'clock to 2 o'clock, within 8 inch		M1
	114.75	S02	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
	118.02	F02	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
	131.89		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
	158.34		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
	182.78		TF	Tap Factory Made at 2 o'clock, 4inch dim / clay		
	209.04		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
	230.90		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
9/9/2021			jl	1	3475
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		523.3 '	523.3 '



1:1842 Distance		Code	Observation	Photo	Grade
257.02		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
281.57		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
307.04		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
341.84		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
346.04		TF	Tap Factory Made at 10 o'clock, 4inch dim / clay		
405.00		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
444.47		TB	Tap Break-In at 2 o'clock, 4inch dim / conc		
469.56		TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
481.72		TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
512.83	S03	RPR	Repair Point Pipe Replaced, within 8 inch, Start / pvc		
513.40		TS	Tap Saddle at 2 o'clock, 4inch dim / pvc		
519.73	F03	RPR	Repair Point Pipe Replaced, within 8 inch, Finish / pvc		
523.26		AMH	Manhole / 09DA-015		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	1200	1200	0.0	2.0	2.0	0.0	1.0	1.0

#18

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
3/20/2023			JL	1	3864
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		280.2 '	280.2 '

City:	ashland	Drainage Area:		Upstream MH:	15BB-010
Street:	palmer 3864	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	15BB-002
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					

1:2115	Distance		Code	Observation	Photo	Grade
15BB-010						
	0.00		AMH	Manhole / 15BB-010		
	0.00		MWL	Water Level, 0% of the vertical dimension		
	71.32		TS	Tap Saddle at 10 o'clock, 4inch dim / pvc		
	83.54		RFJ	Roots Fine Joint at 3 o'clock, within 8 inch	M1	
	86.88	S01	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Start, within 8 inch		
	101.33	F01	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Finish, within 8 inch	M1	
	133.62		RFJ	Roots Fine Joint from 11 o'clock to 1 o'clock, within 8 inch	M1	
	143.49	S02	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Start, within 8 inch		
	161.42	F02	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Finish, within 8 inch	M1	
	161.43		TB	Tap Break-In at 10 o'clock, 4inch dim / orange		
	217.12		RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, within 8 inch	M1	
	238.93	S03	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Start, within 8 inch		
	264.89	F03	RFJ	Roots Fine Joint from 10 o'clock to 2 o'clock, Finish, within 8 inch	M1	
	280.18		AMH	Manhole / 15BB-002		
15BB-002						

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	1B00	1B00	0.0	15.0	15.0	0.0	1.0	1.0

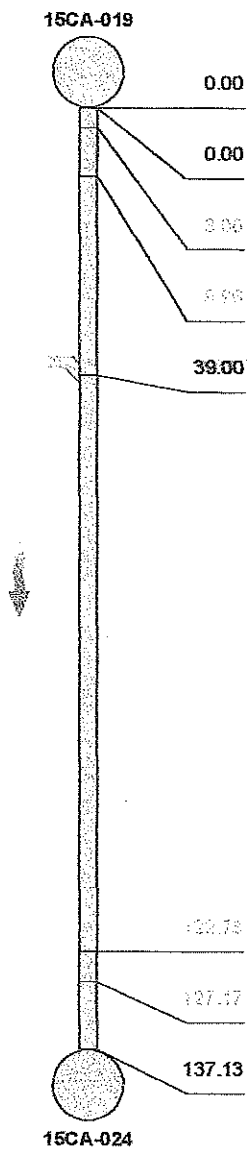
WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
8/9/2021			jl	1	4332
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		137.1 '	137.1 '

City:	ashland	Drainage Area:		Upstream MH:	15CA-019
Street:	starlite 4332	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	15CA-024
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:



Distance	Code	Observation	Photo	Grade
0.00	AMH	Manhole / 15CA-019		
0.00	MWL	Water Level, 0% of the vertical dimension		
3.00	RFJ	Roots Fine Joint from 3 o'clock to 9 o'clock, within 8 inch		M1
5.96	RFJ	Roots Fine Joint from 3 o'clock to 9 o'clock, within 8 inch		M1
39.00	TB	Tap Break-In at 2 o'clock, 4inch dim / conc		
122.78	RFJ	Roots Fine Joint from 3 o'clock to 9 o'clock, within 8 inch		M1
127.17	CC	Crack Circumferential from 12 o'clock to 12 o'clock, 1inch defective, 0inch intrusion.		R1
137.13	AMH	Manhole / 15CA-024		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
1100	1300	1400	1.0	3.0	4.0	1.0	1.0	1.0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
8/9/2021			jl	1	4333
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Upstream		97.2 '	97.2 '

City:	ashland	Drainage Area:		Upstream MH:	15CA-024
Street:	oneida 4333	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	15CA-013
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			

Additional Info:

1:734 Distance		Code	Observation	Photo	Grade
15CA-013					
0.00		MWL	Water Level, 10% of the vertical dimension		
0.00		AMH	Manhole / 15CA-013		
2.44		RFJ	Roots Fine Joint from 12 o'clock to 4 o'clock, within 8 inch		M1
13.44		RFJ	Roots Fine Joint from 8 o'clock to 4 o'clock, within 8 inch		M1
35.00		TS	Tap Saddle at 12 o'clock, 4inch dim / pvc		
38.98	P01	RFJ	Roots Fine Joint from 9 o'clock to 3 o'clock, Start, within 8 inch		M1
60.10	P01	RFJ	Roots Fine Joint from 9 o'clock to 3 o'clock, Finish, within 8 inch		M1
68.68	S02	RFJ	Roots Fine Joint from 9 o'clock to 3 o'clock, Start, within 8 inch		
95.71	F02	RFJ	Roots Fine Joint from 9 o'clock to 3 o'clock, Finish, within 8 inch		M1
97.20		AMH	Manhole / 15CA-024		
15CA-024					

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	1700	1700	0.0	7.0	7.0	0.0	1.0	1.0

#19

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
8/9/2021			jl	1	4334
Year laid:	**Pre-cleaning:**	**Direction:**	**Pipe Joint Length:**	**Total Length:**	**Length Surveyed:**
	Not Known	Upstream		123.6 '	123.6 '

City:	ashland	Drainage Area:		Upstream MH:	15CA-013
Street:	oneida 4334	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	15CA-012
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	6 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Concrete Segments (unbolted)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					

1:934	Distance	Code	Observation	Photo	Grade
15CA-012					
	0.00	AMH	Manhole / 15CA-012		
	0.00	MWL	Water Level, 10% of the vertical dimension		
	33.78	TB	Tap Break-In at 10 o'clock, 4inch dim / conc		
	71.31	TB	Tap Break-In at 2 o'clock, 4inch dim / conc		
	113.44	RFJ	Route Pipe Joint from 3 o'clock to 4 o'clock, within 6 inch		M
	123.63	AMH	Manhole / 15CA-013		
15CA-013					

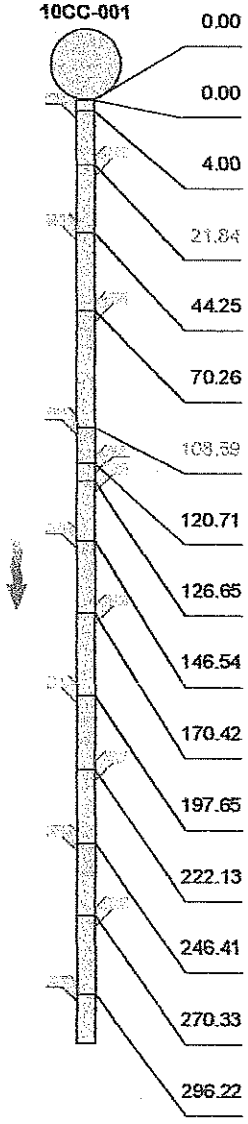
QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	1100	1100	0.0	1.0	1.0	0.0	1.0	1.0

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
9/8/2021			jl	1	5160
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		451.0 '	451.0 '

City:	ashland	Drainage Area:		Upstream MH:	10CC-001
Street:	siskiyou 5160	Media Label:		Up Rim to Invert:	0.0
Location Code:		Flow Control:		Downstream MH:	10CC-018
Location Details:		Sheet Number:		Down Rim to Invert:	0.0
Pipe shape:	Circular	Sewer Use:		Total gallons used:	0.0
Pipe size:	8 "	Sewer Category:	SEC	Joints passed:	0
Pipe material:	Clay Tile (not vitrified clay)	Purpose:		Joints failed:	0
Lining Method:		Owner:			
Additional Info:					

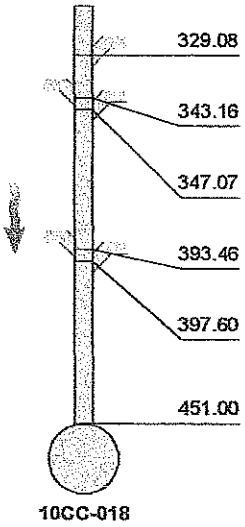


1:2360 Distance	Code	Observation	Photo	Grade
0.00	AMH	Manhole / 10CC-001		
0.00	MWL	Water Level, 10% of the vertical dimension		
4.00	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
21.84	TBC	Tap Break-In Capped at 9 o'clock, 4inch dim	M2	
44.25	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim		
70.26	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
108.39	TFD	Tap Factory Made Defective at 3 o'clock, 4inch dim, 2inch defective / clay roots	M2	
120.71	TFC	Tap Factory Made Capped at 9 o'clock, 4inch dim / clay		
126.65	TB	Tap Break-In at 10 o'clock, 4inch dim / conc		
146.54	TS	Tap Saddle at 3 o'clock, 4inch dim / pvc		
170.42	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
197.65	TFC	Tap Factory Made Capped at 3 o'clock, 4inch dim / clay		
222.13	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
246.41	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
270.33	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
296.22	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		

WinCan

Inspection report

Date:	Work Order:	Weather:	Surveyed By:	Certificate Number:	Pipe Segment Ref.:
9/8/2021			ji	1	5160
Year laid:	Pre-cleaning:	Direction:	Pipe Joint Length:	Total Length:	Length Surveyed:
	Not Known	Downstream		451.0 '	451.0 '



1:2360 Distance	Code	Observation	Photo	Grade
329.08	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
343.16	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
347.07	TFC	Tap Factory Made Capped at 10 o'clock, 4inch dim / clay		
393.46	TFC	Tap Factory Made Capped at 2 o'clock, 4inch dim / clay		
397.60	TFC	Tap Factory Made Capped at 9 o'clock, 4inch dim / clay		
451.00	AMH	Manhole / 10CC-018		

QSR	QMR	QOR	SPR	MPR	OPR	SPRI	MPRI	OPRI
0000	2200	2200	0.0	4.0	4.0	0.0	2.0	2.0

SEWER PIPES		
ID	Upstream Depth (ft)	Downstream Depth (ft)
1217	5.99	
1393	4.08	4.74
1453	8.8	
1454		
1455		
1458		
1461		5.45
1551	6.02	
1552		
1553		5.88
1627	4.58	4.39
1646	4.29	5.59
2196	9.8	
2197		
2198		8.58
2223	6.7	4.58
2227	10.76	13.6
2230	7.8	9.16
2243	4.46	7.8
2261		2.7
2539		5.46
2574	6.6	4.04
2619	7	4
2777	4.28	4.38
3104	7	9.7
3115	4.12	5.12
3323	9.8	9.46
3397	8.8	9.42
3441	7.4	8.8
3454	7.36	8.04
3475	7.06	7.68
3576	6.12	7.06
3864	4.94	5.24
4332	5.7	
4333		
4334		5.88
5160	8.04	6.1
5268	8.08	7.4
5280	7.74	7.24
7687	9.34	10.36
STORM PIPES		
ID	Upstream Depth (ft)	Downstream Depth (ft)
5230	9.02	

Council Business Meeting

Date: April 21, 2026

Agenda Item	Social Service Grant Awards
Department	Community Development
From	Linda Reid, Housing Program Manager

TIME ESTIMATE
30 minutes

CATEGORY
Action Needed - Motion to approve an action

SUMMARY
The City advertised the availability of a total of $99,000 for Social Services funding for the fiscal 2025-26 biennium. Social Services grant money is funded through the General Fund. The City received ten applications totaling over $236,000 in response to the request for proposals.

POLICIES, PLANS & GOALS SUPPORTED

- The Strategic Plan for the Use of Social Service Grant funds
- Council Values:
    1. Community affordability, including in available housing and childcare
    2. Regional cooperation, including in support for public safety and homelessness

BACKGROUND AND ADDITIONAL INFORMATION
In December of 2014, the Council adopted the Strategic Plan for the use of Social Service Grant funds which altered the recommendation process for the City's Social Service Grant Program to include a review and recommendation by the Housing and Human Services Commission. The Strategic Plan for the use of Social Service Grant funds is intended to provide guidance for applicants and assistance to elected and appointed officials by providing a framework for allocating resources and for tracking progress on identified goals and community priorities. The Strategic Plan for the Use of Social Service Grant funds identified five priorities and six strategies to guide funding decisions. The review of grant applications in consideration of the strategic priorities allows these funds to best support proposals that leverage community collaboration and promote community safety, health and wellbeing. The Housing and Human Services Commission utilized the priorities and strategies identified in the strategic plan as a framework for their allocation decisions.

ADVISORY COMMITTEE RECOMMENDATIONS
The Housing and Human Services Advisory Committee reviewed the applications and made a funding recommendation at their regular meeting on February 26, 2026. The Housing and Human Services Advisory Commission Recommendations for awards totaling the $134,000 available are as follows:

- Ashland Emergency Food Bank-$7,500
- Center for Non-Profit Legal Services-$5,100
- Community Works Inc. (Dunn House)-$10,180
- Jackson County SART-$7,220
- RVCOC- Food and Friends-$8,740
- Rogue Valley Mentoring-$4,500
- OHRA-$25,100
- Southern Oregon Jobs with Justice-$8,060

- St. Vincent De Paul-$15,900
- United Way-$6,700

FISCAL IMPACTS

The biennium budget process has earmarked allocations for the Social Service Grant funding in the sum of $99,000. This allocation means there is no additional financial impact on the City arising from this designated funding. Should the Council decide not to award the funds, they would remain unspent. The 2025-26 biennium budget process has already allocated these funds, and if not disbursed, they could either stay unallocated throughout the remainder of the biennium or be redirected via a supplemental budget process.

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move to accept the Housing and Human Services Advisory Committee's award recommendations. Allocating the social service grant funds as follows.

- Ashland Emergency Food Bank-$7,500
- Center for Non-Profit Legal Services-$5,100
- Community Works Inc. (Dunn House)-$10,180
- Jackson County SART-$7,220
- RVCOC- Food and Friends-$8,740
- Rogue Valley Mentoring-$4,500
- OHRA-$25,100
- Southern Oregon Jobs with Justice-$8,060
- St. Vincent De Paul-$15,900
- United Way-$6,700

REFERENCES & ATTACHMENTS

1. Social Service Grant Applications-All_Redacted
2. Strategic_Plan_For_Social_Service_Grant_Funds_2014_Adopted

City of Ashland Social Service Grant Program

Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Ashland Emergency Food Bank **DATE:** 2/3/2026

OTHER NAMES ORGANIZATION KNOWN BY (DBA) Ashland Community Food Bank

ADDRESS 560 Clover Lane Ashland Oregon 97520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Removing Transportation Barriers to Food Access in Ashland

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? • Supports to increase accessibility and availability of transportation c

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ _____
GRANT CONTACT (If other than Executive Director listed below)
Name _____
Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION
Name Catie Mahoney
Telephone 484 947 4346 **E-mail** director@ashlandcfb.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Signature of Board President

Interim: John Wallar
Type Name

Signature of Executive Director/CEO

Catie Mahoney
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Ashland Community Food Bank

PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

1. **Program/project is: new __ established/continuingX__ pilot __ If pilot, expected duration _____**

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*

   We serve families living in Ashland or Talent and surrounding rural areas with 97520 or 97540 zip code. 85% Ashland residents, 15% Talent residents

3. What will this funding enable?

   This funding will enable a wider variety of food to be offered for our home delivery program and provide the opportunity for additional households to enroll in our home delivery program. This would help to expand our services to new geographical regions, increase our capacity for serving families outside of our standard hours, address language barriers, and reduce stigma associated with food access.

4. Number of volunteers this program/project will engage: 94

   Number of paid program employees this program/project will engage: 3

5. Total number volunteer's agency utilizes: 156

   Total number of paid agency employees: 4

6. Outline key strategies of the project/program with timeline and staff structure.

The Ashland Community Food Bank's no-cost grocery home delivery program directly advances the City of Ashland Social Service Grant Program mission to improve the lives, health, and wellbeing of Ashland residents, particularly those who are most vulnerable. This program addresses the Strategic Priority of increasing accessibility and availability of transportation options by removing transportation barriers to essential nutrition for frail seniors, people with disabilities, individuals with mental health challenges, and low-income households. For residents who are unable to drive, afford transportation, or safely use existing transit options, grocery delivery functions as a critical transportation support, ensuring access to healthy food while promoting housing stability, physical health, and the ability to safely remain in the community. This program leverages established community infrastructure and proven service capacity to provide a ready-to-proceed, cost-effective solution to a documented community Households will be elligible to receive home deliveries twice per month for 12 months, a to
We will: • Expand our referral partnerships with other organizations in the area to identify households in need services • Train all staff members to conduct enrollment and delivery for the home delivery program
• Conduct evaluation to assess project outcomes
Community engagement will take place through volunteer and internship opportunities to support the project.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

   We will use qualitative and quantitative data collection methods to evaluate: service reach, reduction in barriers, and operational capacity.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Ashland Community Food Bank
PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. **mission statement, purpose(s) and how this program/project fits with your mission.**
b. **your organization's unique qualifications to accomplish your program outcomes?**
c. **what approach is your agency taking to serve clients and train staff on trauma informed care?**

2. **What:**
   a. **issues(s) is the project/program intended to impact,**
   b. **strategy for change your program will be based on,**
   c. **evidence that the project/program will be successful in the proposed setting, and**
   d. **what tool(s) will you use to measure outcomes?**

3. **How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)**

a. Our mission is: "In solidarity with our community, the Ashland Community Food Bank sustainably provides food at no cost to all those in need living in Ashland and Talent, while increasing awareness of food insecurity. We serve all people with dignity."

b. This initiative fits our mission as it creates a dignified way for community members facing transportation and access barriers to receive food support. Food access is foundational for health and well-being, addressing a core need and increasing quality of life for vulnerable populations. We have been offering home delivery services to the community and are uniquely poised to expand this initiative as we have the infrastructure, volunteer capacity, and community partnerships in place to do so. In 2025, 7% of all the food distributed by the Food Bank was done via home delivery.

c. Ashland Community Food Bank policies and procedures are rooted in a client-centered approach. Our volunteers and staff go through extensive trauma-informed care training, and in 2026 we expanded these training courses to include monthly workshops with breakout sessions. Additionally, we regularly seek feedback from clients and make program modifications to best suite community needs. The primary languages of our client base are English and Spanish, and thus all our materials are available in English and Spanish, and we have bilingual support on site for services.

2. a. This transportation intervention supports community members with mental and physical health issues, aging adults, and low-income working families.

b. This method of food access eliminates the need for vulnerable populations to travel, reduces physical and mobility barriers, and ensures services are available to those who have previously not been reached.

c. Given the success of the existing home delivery program, along with the potential to collaborate with additional social service and health partners for referrals, and the additional transportation challenges with bus routes being cut, this is a timely intervention.

d. Success measurements will include number of households served, number of total people served, number of home deliveries completed, number of volunteers trained to conduct home deliveries, For quantitative data, we will use our Pantry Soft software which tracks data related to clients, visits, and types/pounds of food distributed. Additionally, we will collect qualitative and quantitative data from participant feedback surveys.

3. This program would allow for additional collaboration between social service agencies and healthcare providers to best serve vulnerable populations. It would also reduce the number of external resources needed for those currently struggling to get to the Food Bank, including having to use multiple modalities of transportation, and/or requiring Valley Lift services. It would also create additional engagement opportunities for those seeking to volunteer in the community.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Ashland Community Food Bank
PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): 01/01/2023-12/31/2024 b. Administration & Fundraising expense: $ _____ _____%

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990, Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense	$ 506,341	
d. **Total expenses**:	$ 506,341	
e. Sources of **revenue**:		
Memberships/ individual contributions	$ 621,096	96 %
Raised through fundraising activities	$	%
Government	$	%
Foundations	$	%
United Way	$	%
Fees for Service	$	%
Other (reimbursements, payments, bequests, etc.)	$ 27,103	4 %
f. **Total revenue:**	$ 648,199	

2. What is the highest level of financial reporting required by your funders?
   Balance sheet, Profit and Loss Statement, program budget
3. Briefly describe your sustainability outlook for the project/program in the future.
   We will continue to train volunteers and operate the program with minimal staff oversight/support. For food and supply purchasing, we will utilize general operating funds and offset with grant and foundation support.

4. a. Total organizational annual budget **current ongoing** fiscal year: 619,341

   b. Total program/project budget current ongoing fiscal year: 98,303

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, **2026,** to June 30, **2027**(*If Applicable)

RECIPIENT AGENCY Ashland Community Food Bank * January 1, 2026-December 31, 2027

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$	$
Jackson County Funds	$	$
CDBG (identify)	$	$
Other State or Federal Funds	$	$
United Way Funds	$	$
Other Funds (identify)	$620,000	$
SUB TOTALS	$ 620,000	$
TOTAL REVENUE (Pending & Secured)		$ 620,000
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$217200
Total Benefits		$4800
TOTAL PERSONNEL SERVICES		$ 222,000
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Food purchases		$250625
Depreciation		$12552
Insurance		$20588
Utilities		$15600
Vehicle		$10800
Other expenses		$41261
TOTAL MATERIALS & SERVICES		$ 399,341
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		$ 0
TOTAL EXPENDITURES (Sum of A, B & C)		$ 619,341

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, **2026** to June 30, **2027 (*If Applicable)**

RECIPIENT AGENCY Ashland Community Food Bank * January 1, 2026-December 31, 2027

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$	$
Jackson County Funds	$	$
CDBG (identify)	$	$
Other State or Federal Funds	$	$
United Way Funds	$	$
Other Funds (identify)	$ 6,000 + General operating	$ 16,000
SUB TOTALS	$	$
TOTAL REVENUE (Pending & Secured)		**$**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 16,000
Total Benefits		$
TOTAL PERSONNEL SERVICES		**$**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Utilities		$ 2,652
Vehicle and fuel		$ 1,836
		$
Food purchases		$ 42, 606.25
Other expenses		$ 7,014.37
Insurance and background checks		$ 1,870
TOTAL MATERIALS & SERVICES		**$**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$**
TOTAL EXPENDITURES (Sum of A, B & C)		**$ 71, 978.62**

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Ashland Community Food Bank

PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

I.

II.

		# Whole Program	*# Ashland*	
Gender				
Age*	Female	258	230	
	Male	264	235	
	Other	2846 * prefer not to say	2533 * prefer not to say	
	Totals	3,375 total	2,998 total	
	0 to 5			
	6 to 12			
	13 to 17			
	18 to 30			Under 18: 669
	31 to 40			Between 18-62: 1952
	41 to 50			
	51 to 61			
	62 +		579	
	Unknown			
	Total		3,200	

*at point of entry for service

*175 not reported

IV. Race/Ethnicity

	#Whole Program	*Ethnicity Hispanic/Latino**	*# Ashland*
White			
Black/African American			
American Indian/Alaskan Native			
Native Hawaiian/other Pacific Islander			
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial			
Other			
Totals			

**We do not collect this information

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Ashland Community Food Bank

PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

1. **Number of board members required in bylaws?** **Minimum** 8 **Maximum** 12
2. **Number of board members currently active?** **# Voting** 9 **Vacancies** ____
3. **Average percentage board meeting attendance (over last completed year):** 95 **%**
4. **Percent of board in attendance required for a quorum:** 66 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
Executive	4
Governance	3
Facilities	3
Finance	4

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	7	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial	2	2
Other		
Totals	9	2

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

2026 Board of Directors Roster

- Elections to take place in early 2026, appointment of chairs may differ based on results.

Name	Professional Experience
Denise Deneaux	Retired Teacher and Executive Assistant
Pam Lucas *Board Treasurer*	Retired, Business Manager, Ashland School District
Elva Manquera-DeShields	Science Communications, Outreach, and DEIJ Manager - Klamath Bird Observatory
Natalie Mettler	Senior Services Superintendent, Senior Services Division, Ashland Park & Rec
Stef Seffinger *Board President*	Independent Artist Former Ashland Parks and Recreation Commissioner; Former Ashland City Council
Joyce Van Anne	Retired Early Education Specialist
Richard Spencer *Board Secretary*	Retired - Marketing/Communication
Sara Koenig	Retired National Park Service Biologist
John Wallar *Board Vice Presdient*	Retired Business owner; Facilities management
Pam Greenwood	Retired US Forest Service and Law Enforcement; 27 years with US Forest Service

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: MAR 07 2006

Employer Identification Number:
[redacted]
DLN:
[redacted]

ASHLAND EMERGENCY FOOD BANK
1135 VILLAGE GREEN DR
ASHLAND, OR 97520-0000

Contact Person:
EDWINA O PERKINS ID# 31229
Contact Telephone Number:
(877) 829-5500
Public Charity Status:
509(a)(2)

Dear Applicant:

Our letter dated March 2002, stated you would be exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code, and you would be treated as a public charity, rather than as a private foundation, during an advance ruling period.

Based on the information you submitted, you are classified as a public charity under the Code section listed in the heading of this letter. Since your exempt status was not under consideration, you continue to be classified as an organization exempt from Federal income tax under section 501(c)(3) of the Code.

Publication 557, Tax-Exempt Status for Your Organization, provides detailed information about your rights and responsibilities as an exempt organization. You may request a copy by calling the toll-free number for forms, (800) 829-3676. Information is also available on our Internet Web Site at www.irs.gov.

If you have general questions about exempt organizations, please call our toll-free number shown in the heading.

Please keep this letter in your permanent records.

Sincerely yours,

Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Letter 1050 (DO/CG)

Balance Sheet Comparison - YTD

Ashland Emergency Food Bank

As of December 31, 2025

DISTRIBUTION ACCOUNT	TOTAL			
	AS OF DECEMBER 31, 2025	AS OF DECEMBER 31, 2024 (PY)	$ CHANGE (PY)	% CHANGE (PY)
Assets				
Current Assets				
Bank Accounts				
Edward Jones Account	35.20	35.20	0.00	0.0 %
Key Bank Checking	287,034.25	291,729.20	-4,694.95	-1.61 %
Key Bank Savings 2408	265,669.28	88,169.28	177,500.00	201.32 %
Rogue Credit Union 3258	118,383.96		118,383.96	
Rogue Credit Union Money Market 3232	115,000.00		115,000.00	
Total for Bank Accounts	**$786,122.69**	**$379,933.68**	**$406,189.01**	**106.91 %**
Accounts Receivable				
Other Current Assets	**$827,500.85**	**$801,209.35**	**$26,291.50**	**3.28 %**
Total for Current Assets	**$1,613,623.54**	**$1,181,143.03**	**$432,480.51**	**36.62 %**
Fixed Assets	**$411,855.00**	**$424,410.00**	**-$12,555.00**	**-2.96 %**
Other Assets	**$67,273.89**	**$53,081.00**	**$14,192.89**	**26.74 %**
Total for Assets	**$2,092,752.43**	**$1,658,634.03**	**$434,118.40**	**26.17 %**
Liabilities and Equity				
Liabilities				
Current Liabilities	**$34,002.03**	**$20,431.53**	**$13,570.50**	**66.42 %**
Long-term Liabilities				
Total for Liabilities	**$34,002.03**	**$20,431.53**	**$13,570.50**	**66.42 %**
Equity				
Net Assets	1,579,664.43	1,466,095.04	113,569.39	7.75 %
Net Income	419,032.91	141,857.84	277,175.07	195.39 %
Grant/Fund Balances				
Anna May Foundation Grant	1,293.55	0.00	1,293.55	
Ashland Com Health-Outreach	6,462.33	0.00	6,462.33	
Ashland Co-op Grant	0.00	4,000.00	-4,000.00	-100.0 %
Ashland Co-op Restricted Diet G	254.54	254.54	0.00	0.0 %
CareOregon Grant	**$0.00**	**$358.83**	**-$358.83**	**-100.0 %**
Carpenter Grant	4,118.50	0.00	4,118.50	
Chaney Grant	2,775.00	0.00	2,775.00	
Isaac Lindsay Fund	121.00	121.00	0.00	0.0 %
Marie Lamfrom Grant	24,998.00		24,998.00	
OR Community Foundation Grants	**$5,000.00**	**$10,515.25**	**-$5,515.25**	**-52.45 %**
Roundhouse Foundation Grant Bal	13,114.38	15,000.00	-1,885.62	-12.57 %
Trinity Food/Produce Grant	1,915.76	0.00	1,915.76	
Total for Grant/Fund Balances	**$60,053.06**	**$30,249.62**	**$29,803.44**	**98.53 %**
Total for Equity	**$2,058,750.40**	**$1,638,202.50**	**$420,547.90**	**25.67 %**
Total for Liabilities and Equity	**$2,092,752.43**	**$1,658,634.03**	**$434,118.40**	**26.17 %**

City of Ashland Social Service Grant Program

Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Opportunities for Housing, Resources and Assistance **DATE:** 02/12/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) OHRA

ADDRESS PO Box 1133 Ashland OR 94520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Ashland Community Housing Program

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Assistance to obtain and/or retain housing

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ $ 110,000

GRANT CONTACT (If other than Executive Director listed below)

Name _____

Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION

Name Dan Cano

Telephone (541) 531-0669 **E-mail** danc@ohrahelps.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Catherine D. Gerbracht
Signature of Board President

Dan Cano
Signature of Executive Director/CEO

Catherine Gerbracht
Type Name

Dan Cano
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

1. **Program/project is:** **new** ☐ **established/continuing** ☑
   pilot ☐ **If pilot, expected duration** _____

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*

   City of Ashland

3. What will this funding enable?
   This funding will enable OHRA to deliver Ashland focused case management, navigation and housing support services that keep working families and vulnerable individuals housed, and link unhoused residents to services and housing supports.

4. Number of volunteers this program/project will engage: 10

   Number of paid program employees this program/project will engage: 10

5. Total number volunteer's agency utilizes: 40

   Total number of paid agency employees: 50

6. Outline key strategies of the project/program with timeline and staff structure.
   OHRA's strategy is to carve out an Ashland focused program designed to best respond to the needs of unhoused and housing threatened Ashland residents.
   The program will allocate a navigator who will leverage community resources, collaborations, and regional partnerships to access rent assistance, deposit assistance, and utility assistance. These activities have a direct and positive impact on getting or keeping Ashland residents housed.
   OHRA will utilize The OHRA Center, which is the region's largest drop-in resource center and shelter. The Center is known to the community and key to helping at-risk residents access services from our 60+ agency partners including La Clinica, Maslow Project, DHS, and Jackson County Mental Health.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

   Our request is for $110,000 of this we will use $60,000 for a resource navigator's wages and benefits and $50,000 for rent deposit, one-time rental assistance and/or utilities assistance.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Opportunities for Housing Resources and Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. **mission statement, purpose(s) and how this program/project fits with your mission.**
b. **your organization's unique qualifications to accomplish your program outcomes?**
c. **what approach is your agency taking to serve clients and train staff on trauma informed care?**

2. What:

a. **issues(s) is the project/program intended to impact,**
b. **strategy for change your program will be based on,**
c. **evidence that the project/program will be successful in the proposed setting, and**
d. **what tool(s) will you use to measure outcomes?**

3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

Mission, Purpose and Program Fit: OHRA helps low-income people build better lives. By offering hope and access to social service resources, we encourage those in need on the path to self-sufficiency. OHRA's purpose is embedded in our mission statement; we work with low-income people by building trusting relationships, we connect them to appropriate resources, through our Resource Center or our network of more than 60 partners to help them on a path so sustainability. The proposed program is a continuation of services and methods OHRA has provided since its inception. This program will pay for a navigator who is trained to establish relationships with the target population, and through supports and linkages to services the project offers hope, access, and movement toward sustainability. These funds will be used to support Ashland residents exclusively.

Approach: Resource navigators build trust and understanding with people who are unhoused, unstably housed, and who are guests visiting OHRA's resource centers. This trauma informed approach increases the navigator's influence on the community member to engage in services that address the immediate and longer-term challenges they face. OHRA's staff receive regular and up to date training on trauma informed practices through professional trainers and in-house mentoring.

Issues the project/program intended to impact: This program addresses all 4 challenges identified in Ashland's Strategic Plan for Social Services. These challenges include 1) providing more effective services options for high need individuals with challenging behaviors, 2) increasing services to vulnerable populations struggling with disabilities, mental health, or elder care; 3) increase housing supports/options for working families; and 4) linking families and individuals to transitional housing.

These challenges continue to be present in Ashland, and in many ways have increased. Over 75% of individuals who OHRA contacts at the Night Lawn and shelters have some co-occurring symptoms related to cognitive or mental health challenges. Working families continue to struggle to maintain affordable housing; and more seniors need rent assistance and support. We see this daily in our shelters and outreach programs.

Strategy for Change: Our service model is based on navigators building a trusting relationship with guests and assisting them to address personal, social, health, and other barriers to stability. OHRA's continuous development of strategic partners is also critical to keeping residents housed and linking guests to services.

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance
PROGRAM/PROJECT TITLE Ashland Community Housing Program

Continue from previous page (if needed):

Evidence that the project/program will be successful: OHRA has delivered comprehensive social services to Ashland since 2014. Between 4/1/21 and 6/30/25, OHRA navigators helped 575 unhoused families (880 individuals including 121 children) find permanent housing and assisted 1,381 families threatened with eviction (2,944 individuals including 1,106 children) to remain housed.

By leveraging these funds to provide targeted and specialized services using proven strategies, OHRA will successfully keep or re-house a significant number of Ashland families and individuals and link unhoused residents to critical services.

Tool(s) to measure outcomes: OHRA uses the states' Homeless Management Information System to track engagement notes and progress, while program expense procedures document how and where funds are spent. Using these tools, OHRA will track and report the number of unhoused residents we house, the number of residents we help to stay housed, and the funds spent for emergency deposit, back-rent, and utility assistance.

We will also perform follow-up contacts at 6 and 12 months to determine the status of the households we assist and the number of other services delivered (e.g. life skills education, utilities assistance, referrals to other services).

Benefit to the community as a whole: In 2025, OHRA deepened its collaboration with the Ashland Police Department, leaders on the City Council, neighborhood leaders, and community advocates to increase coordination that has led to increased capacity and services for residents in crisis. However, OHRA's capacity to continue its work relies on financial support and partnerships with the City and its residents. By the city investing this funding in ORHA, we can continue to be a catalyst and resource hub for addressing our city's social services challenges.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Opportunities for Housing, Resources abd Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2022 -06/2023

   b. Administration & Fundraising expense: $ 372,901 15.8 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

   c. Program expense $ 1,991,802

   d. **Total expenses**: **$** 2,364,703

   e. Sources of **revenue**:

Memberships/ individual contributions	$0	%
Raised through fundraising activities	$	%
Government	$1,705,089	57.8 %
Foundations	$1,242,973	42.1 %
United Way	$0	%
Fees for Service	$0	%
Other (reimbursements, payments, bequests, etc.)	$2,880	0.1 %

   f. **Total revenue**: **$** 2,950,942

2. What is the highest level of financial reporting required by your funders?
   Federal single audit

3. Briefly describe your sustainability outlook for the project/program in the future.
   OHRA will continue to leverage funds from the state, private foundations and private donors to maintain capacity. Critical to this is our fundraising and grant-writing infrastructure, which gives us the capacity to seek funding for successful programs. The City also has been a critical part of our sustainability as well, as we work closely with City Council and staff to partner on state and future federal grants to increase housing options for Ashland's most vulnerable.

4. a. Total organizational annual budget **current ongoing** fiscal year: 3,109,956

   b. Total program/project budget current ongoing fiscal year: 1,456,798

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, **2026,** to June 30, **2027**(*If Applicable)

RECIPIENT AGENCY Opportunities for Housing Resources and Assistance

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$0	$0
City of Ashland Funds	$ 110,000	$
Jackson County Funds	$	$
CDBG (identify)	$	$
Other State or Federal Funds	$ 1,750,000	$ 895,000
United Way Funds	$ 0	$ 0
Other Funds (Grants, gifts, carry-over)	$ 1,200,000	$ 200,000
SUB TOTALS	$ 3,060,000	$ 945,000
TOTAL REVENUE (Pending & Secured)		**$ 4,005,000**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$2,540,266
Total Benefits		$216,882
TOTAL PERSONNEL SERVICES		$2,757,147
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Barrier Reduction (Rent/utilities assistance, other guest assistance etc)		$217,044
Shelter and Shower Trailer		$605,072
Training		$13,325
Outreach and Donor Communications		$12,813
Accounting, Insurance and Board Expenses		$182,450
Depreciation		$211,654
TOTAL MATERIALS & SERVICES		$1,242,357
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		$0
TOTAL EXPENDITURES (Sum of A, B & C)		**$ 3,999,505**

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, **2026** to June 30, **2027 (*If Applicable)**

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$ 0	$ 0
City of Ashland Funds	$ 110,000	$
Jackson County Funds	$ 0	$ 0
CDBG (identify)	$ 0	$ 0
Other State or Federal Funds	$ 380,000	$ 895,000
United Way Funds	$ 0	$ 0
Other Funds (Grants, gifts and carry-over)	$ 90,000	$ 200,000
SUB TOTALS	$ 580,000	$ 915,000
TOTAL REVENUE (Pending & Secured)		**$ 1,495,000**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$1,027,893
Total Benefits		$125,218
TOTAL PERSONNEL SERVICES		**$1,153,057**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Barrier Reduction (Rent/utilities assistance, other assistance etc.)		$217,044
Training		$3,075
Utilities		$37,413
Supplies		$64,179
Insurance		$18,450
		$
TOTAL MATERIALS & SERVICES		**$340,161**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$0**
TOTAL EXPENDITURES (Sum of A, B & C)		**$ 1,493,218**

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

			# Whole Program	*# Ashland*
I.	**Gender**			
	Age*	Female	950	298
		Male	957	341
		Other	125	25
II.		**Totals**		
		0 to 5	142	49
		6 to 12	190	59
		13 to 17	124	47
		18 to 30	268	97
		31 to 40	382	128
		41 to 50	349	101
		51 to 61	292	98
		62 +	209	77
		Unknown	86	9
		Total	2042	665

***at point of entry for service**

IV. Race/Ethnicity

	#Whole Program	*Ethnicity Hispanic/Latino**	*# Ashland*
White	1445	132	485
Black/African American	62	1	28
American Indian/Alaskan Native	49	13	18
Native Hawaiian/other Pacific Islander	25	0	8
American Indian/Alaskan Native and White	45	5	7
Black/African American and White American Indian/Alaskan Native and Black/African American	43	0	14
	4	1	0
Other Multi Racial	223	183	73
Other	89	0	28
Totals	1985	335	662

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

1. **Number of board members required in bylaws?** **Minimum** 7 **Maximum** 17
2. **Number of board members currently active?** **# Voting** 13 **Vacancies** 0
3. **Average percentage board meeting attendance (over last completed year):** 90 **%**
4. **Percent of board in attendance required for a quorum:** 51 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
Executive Committee	6+1 staff member
Finance Committee	4+1 staff member
Board Development and Governance Committee	4+1 staff member
Development Committee	5+1 staff member

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	11	1
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White	1	
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other		
Totals	12	1

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

There are 4 bi-lingual board members.

City of Ashland Social Service Grant Program

Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Center for NonProfit Legal Services, Inc **DATE:** 2/9/2026

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 225 W Main St, Medford, OR 97501
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Removing Legal Barriers to Self Sufficiency

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Legal Aid to Remove Barriers to Housing

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ 15,000

GRANT CONTACT (If other than Executive Director listed below)

Name _____

Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION

Name Debra F. J. Lee

Telephone 541-779-7292 **E-mail** debralee@cnpls.net

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Colette Boehmer Digitally signed by Colette Boehmer Date: 2026.02.13 12:04:01 -08'00'
Signature of Board President

Colette Boehmer
Type Name

Debra F. J. Lee Digitally signed by Debra F. J. Lee Date: 2026.02.13 12:04:42 -08'00'
Signature of Executive Director/CEO

Debra F. J. Lee
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

1. **Program/project is:** **new** ☐ **established/continuing** ☑
   pilot ☐ **If pilot, expected duration** _____

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*

   for NonProfit Legal Services (CNPLS) requests funding to continue providing critical life-changing civil legal representation for elder and indigent residents of the City of Ashland

3. What will this funding enable?

   This funding will allow CNPLS attorneys to remove legal barriers to fair, safe, and affordable housing, to access to income and health care for Ashland's veterans, seniors, disabled, and indigent residents at risk of homelessness. CNPLS' attorneys protect tenants' legal rights and access to health care and income through legal education, negotiation, administrative hearings and court representation.

4. Number of volunteers this program/project will engage: 2

   Number of paid program employees this program/project will engage: _____

5. Total number volunteer's agency utilizes: 10

   Total number of paid agency employees: 15

6. Outline key strategies of the project/program with timeline and staff structure.
   Funding this grant will support our ongoing mission to provide legal education, advocacy, and civil legal representation. Residents of the City of Ashland have been devastated by COVID isolation and loss of housing after the Almeda fire. Residents are only beginning to recover, and we anticipate increasing challenges for low-income residents now that the housing moratorium is lifted. Our proposal will protect non-discriminatory housing and help Ashland's most vulnerable citizens navigate the recovery process. We will complete this project within the year. Saff will include 0.25 FTE attorney time and .75 paralegal time.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. **mission statement, purpose(s) and how this program/project fits with your mission.**
b. **your organization's unique qualifications to accomplish your program outcomes?**
c. **what approach is your agency taking to serve clients and train staff on trauma informed care?**

2. What:
a. **issues(s) is the project/program intended to impact,**
b. **strategy for change your program will be based on,**
c. **evidence that the project/program will be successful in the proposed setting, and**
d. **what tool(s) will you use to measure outcomes?**

3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1)a. The Center for NonProfit Legal Services (the Center) has provided free civil legal assistance to low-income persons and seniors residing in Jackson County since December 1972. Legal Services' mission is: "To secure justice for and protect the rights of needy persons residing in Jackson County so that such persons shall not by reason of being in financial need be denied equal protection under the law." Our attorneys focus their representation on the priority needs of marginalized, under-resourced individuals, individuals with certain intersecting identities, and the elderly in Jackson County. Our target populations are communities of Color and Marginalized Populations: the homeless, veterans, vulnerable aging, and people with disabilities. Using trauma-informed care principles, we work to engage, protect, and ensure that this population has access to resources that meet their basic needs for food, sustainable shelter, medical care, income maintenance, freedom from domestic violence in family matters, and citizenship enfranchisement through the naturalization process.

1. b.) CNPLS is uniquely qualified to accomplish our program outcomes as we are the only legal aid providers in Jackson County with Oregon licensed attorneys. Only Oregon licensed attorneys are permitted to give legal advice in Oregon law matters, such as housing and public benefits. This project is consistent with our mission and Ashland's Strategic Priorities. As we help Ashland's seniors and indigent residents' obtain/maintain affordable, safe, and secure housing, and remove barriers to public benefits we break the cycle of poverty. Secure housing and access to public benefits, including food and healthcare benefits, are the foundation for health and well-being, allowing citizens to be more productive and engaged with their community. Our attorneys specialize in poverty law, including housing, employment rights, public benefits, family law involving domestic violence and protective services, individual rights -Protecting our Veterans, and immigration law. Poverty law involves constantly changing laws, and our concentration allows for a high level of responsiveness and competence. Our attorneys are highly trained and experienced, with an 80% success rate.

1.c) Providing services using the principles of trauma-informed care is essential if we want to successfully work with indigent and senior members of our community. Staff receives training from online resources such as NCLER and community trainers like Jackson Care Connect. To prevent re-traumatizing clients, we have established a physically safe, respectful, and culturally competent environment. Staff seeks to be transparent and trustworthy as we teach our clients about the law, help them understand their rights, and provide legal options. The legal information we provide our clients gives them the knowledge to make informed choices in

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.
PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

Continue from previous page (if needed):

2. a) We propose to assist in obtaining/maintaining housing and accessing public benefits for Ashland's most vulnerable residents. Our housing attorney provides legal representation that protects affordable, safe, and fair housing. He conducts outreach at Project Community Connect and offers legal education presentations for our community partners and protected populations about fair housing laws. Our public benefits attorney assists seniors and indigent residents with acquiring benefits and overturning benefit denials. All of our attorneys concentrate their legal assistance on the elderly, disabled, and impoverished of Ashland. Our representation holds landlords accountable to the Oregon Landlord/Tenant Act (ORLTA). Our Executive Director serves as the Continuum of Care (CoC) board president and serves on the Housing and Community Development Commission (HCDC). We propose holding conversations with elected and appointed officials on finding solutions for the expanding housing crisis.
2 b) Our Removing Legal Barriers to Self-Sufficiency project is based on the Housing Strategy and Income and Poverty Strategy. We designed this project to provide legal representation to homeless, indigent, and senior Ashland residents who are experiencing legal barriers to safe, clean and affordable housing, and income, food and access to health care. CNPLS provides legal education, advocacy, advice and representation, empowering low-income households to become stable, independent, and self-sustaining. We work to protect and ensure that this often marginalized population obtains access to resources which allows them to meet their basic needs for food, sustainable shelter, medical care and income maintenance.
2 c) The Center for NonProfit Legal Services has served as the only source of civil legal assistance for low-income Ashland residents for over 50 years. Ashland residents make up about one quarter of our caseload. We provide legal education, advocacy, advice, and representation, empowering low-income households to become stable, adequately sheltered, and self-sustaining. We have a proven track record of providing successful resolutions for our clients.
2 d.) Using our case management system, Legal Server, we generate statistical reports each quarter that describe the number of clients served, client demographics, the level of service requested, and case disposition. This report tracks the results of our efforts within specific legal practice areas. Client satisfaction surveys and statistical reports are how we assess our success. In addition, we use this information to verify that we have met our outreach and representation goals.
3. Access to justice enfranchises the whole community. Civil legal aid levels the playing field by educating people to know their rights. It fulfills our nations' fundamental promise of justice for all-not for the few who can afford it. Our program partners with the Rogue Valley Council of Governments (RVCOG) to provide legal services to seniors experiencing problems with housing, Medicare/Medicaid, and SNAP benefits. In addition, we collaborate with Southern Oregon Rehabilitation Center and Clinics (SORCC) to help disabled and homeless veterans secure government benefits so they can maintain their independence.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2023-06/2024

   b. Administration & Fundraising expense: $ 159,896 14 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

   c. Program expense $ 982,218

   d. **Total expenses**: **$** 1,142,114

   e. Sources of **revenue**:

Memberships/ individual contributions	$ 0	%
Raised through fundraising activities	$ 17,609	1.04 %
Government	$ 1,062,326	62.65 %
Foundations	$ 512,704	30.24 %
United Way	$ 9,000	.53 %
Fees for Service	$ 0	%
Other (reimbursements, payments, bequests, etc.)	$ 93,957	5.54 %

   f. **Total revenue**: **$** 1,695,626

2. What is the highest level of financial reporting required by your funders?
   Audit

3. Briefly describe your sustainability outlook for the project/program in the future.
   We are taking a proactive approach to sustainability with our Partnership for Justice Campaign. We are working with our state partners to create new avenues of funding after Trump's cuts to funding. Our goal is to continue expanding our capacity to provide legal assistance to Ashland residents by building community support and our endowment fund. Our long-term focus is to expand our fund development capacity, building on our endowment fund and improving the energy efficiency of our building to reduce expenses to continue our work for justice.

4. a. Total organizational annual budget **current ongoing** fiscal year: $ 1,567,482

   b. Total program/project budget current ongoing fiscal year: $ 65,000

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, **2026,** to June 30, **2027**(*If Applicable)

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$ 16,500
City of Ashland Funds	$ 15,000	$
Jackson County Funds	$	$ 50,000
CDBG (identify) Medford	$ 20,000	$
Other State or Federal Funds	$ 71,000	$ 845,117
United Way Funds	$	$ 9,000
Other Funds (identify) OSB State/Foundations	$ 300,100	$ 240,765
SUB TOTALS	$ 406,100	$ 1,161,382
TOTAL REVENUE (Pending & Secured)		**$ 1,567,482**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 844,454
Total Benefits		$ 153,917
TOTAL PERSONNEL SERVICES		**$ 998,371**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
General		$ 144,200
Technology		$ 7,000
Equipment/Supplies		$ 40,000
Occupancy		$ 360,011
Professional Expenses		$ 17,400
		$
TOTAL MATERIALS & SERVICES		**$ 569,111**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$**
TOTAL EXPENDITURES (Sum of A, B & C) Total Expenditures = 1,567,482		**$**

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, **2026** to June 30, **2027 (*If Applicable)**

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$ 15,000	$
Jackson County Funds	$	$ 1,600
CDBG (identify)	$	$
Other State or Federal Funds	$	$
United Way Funds	$	$
Other Funds (identify)	$ 8,400	$ 40,000
SUB TOTALS	$ 23,400	$ 41,600
TOTAL REVENUE (Pending & Secured)		**$ 65,000**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 47,000
Total Benefits		$ 5,173
TOTAL PERSONNEL SERVICES		**$ 52,173**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
General		$ 5,944
Technology		$ 1,400
Equipment/Supplies		$ 1,595
Occupancy		$ 3,528
Professional Expenses/Insurance		$ 360
		$
TOTAL MATERIALS & SERVICES		**$ 12,827**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$**
TOTAL EXPENDITURES (Sum of A, B & C) Total Expenditures = $65,000		**$**

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

I.

II.

		# Whole Program	*# Ashland*
Gender			
Age*	Female	275	66
	Male	197	31
	Other	5	2
	Totals		
	0 to 5	0	
	6 to 12	0	
	13 to 17	4	
	18 to 30	52	7
	31 to 40	63	15
	41 to 50	70	13
	51 to 61	83	15
	62 +	175	49
	Unknown		
	Total		

***at point of entry for service**

IV. Race/Ethnicity

	#Whole Program	*Ethnicity Hispanic/Latino**	*# Ashland*
White	313		71
Black/African American	10		3
American Indian/Alaskan Native			9
Native Hawaiian/other Pacific Islander	1		
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial	80	80	12
Other	43		4
Totals	447	80	

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

1. **Number of board members required in bylaws?** **Minimum** 5 **Maximum** 15
2. **Number of board members currently active?** **# Voting** 5 **Vacancies** _____
3. **Average percentage board meeting attendance (over last completed year):** 75 **%**
4. **Percent of board in attendance required for a quorum:** 51 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
Personnel	3
Executive	3
Finance	4
Local Campaign for Equal Justice	7
Partnership for Justice	7

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	6	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other	1	1
Totals	7	1

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

CENTER FOR NONPROFIT LEGAL SERVICES BOARD ROSTER

COLETTE BOEHMER
210 LAUREL STREET
MEDFORD, OR 97501
541-779-7552 PHONE
541-772-3374 FAX
cboehmerlaw@gmail.com
Member since 1990

JENNIFER NICHOLLS (TREASURER)
BROPHY MILLS SCHMOR GERKING
201 W MAIN ST. STE 5
MEDFORD OR 97501
541-772-7123 PHONE
541-772-7249 FAX
jnicholls@brophylegal.com
Member since 2017

LILIA CABALLERO (SECRETARY)
MEDFORD POLICE DEPARTMENT
411 W..8TH STREET
541-770-5770- PHONE
lilia.caballero@ci.medford.or.us
Member since 2013

COLIN M. MURPHY
SOUTHERN OREGON PUBLIC
DEFENDER, INC.
301 W. 6TH STREET
MEDFORD, OR 97501
541-779-5636 PHONE
colin@sopd.net
Member since 2024

KATELYN MASON
JAMES A. REDDEN
US COURT HOUSE
310 WEST 6TH STREET
MEDFORD, OR 97501
541-608-8770-PHONE
katelyn_mason@ord.uscourts.gov
Member since 2022

CHRISTINA H. RUBY
ATTORNEY AT LAW
260 JACKSON CREEK DRIVE
JACKSONVILLE, OR 97530
541 778-1647
christina.h.hayes@gmail.com
MEMBER SINCE 2017

SEAN TIPTON
ATTORNEY AT LAW
FROHNMAYER DEATHERAGE
2592 E. BARNETT RD,
MEDFORD, OR 97504
(541) 779-2333
tipton@fdfirm.com
Member since 2023

Internal Revenue Service

Department of the Treasury

District
Director

P.O. Box 2350 Los Angeles, Calif. 90053

Person to Contact:
L. BARRAGAN
Telephone Number:
(213) 894-2336
Refer Reply to:
EO(0406)94
Date:
APR 07 1994

CENTER FOR NON PROFIT LEGAL
SERVICES
P.O. BOX 1586
MEDFORD, OR 97501-0266

RE: CENTER FOR NON PROFIT LEGAL SERVICES
EIN: [redacted]

Dear Taxpayer:

This letter is in response to your request for a copy of the determination letter for the above named organization.

Our records indicate that this organization was recognized to be exempt from Federal Income Tax in DECEMBER 1972 as described in Internal Revenue Code Section 501(c)(3). It is further classified as an organization that is not a private foundation as defined in Section 509(a) of the code, because it is an organization described in Section 170(b)(1)(A)(vi).

The exempt status for the determination letter issued in DECEMBER 1972 continues to be in effect.

If you need further assistance, please contact our office at the above address or telephone number.

Sincerely,

L. Barragan

LUCILLE BARRAGAN
Disclosure Assistant

COMMUNITY WORKS
DOMESTIC VIOLENCE • SEXUAL ASSAULT • STALKING • TRAFFICKING
RESOURCE CENTER
2594 E. Barnett Road Suite C Medford, OR 97504

February 2, 2026

Linda Reid:

Community Works is seeking $12,000 in financial assistance from the City of Ashland, Social Service Grant Program, for a portion of the budget for the Dunn House Shelter.

Attached in this application are the following documents:

- Agency Application
- Agency Board Roster
- Copy of 501 (c)(3) IRS Tax Exemption Letter
- Agency Financial Statement

Thank you and the City of Ashland for your consideration of our request.

Sincerely,

Barbara Johnson
Executive Director

Community Works is here to bring
HOPE, SUPPORT, and EMPOWERMENT
to those impacted by violence.

A 501(c)(3), non-profit, charitable corporation. Donations are tax-exempt to the extent permitted by the IRS code. No goods are provided in exchange for your contribution. Therefore, this gift may qualify for a tax deduction as allowable by law. Our Tax ID number is [redacted]

2025-2026 Board of Directors

Debbie McQueen, Chair	Kevin Sanders, Vice-Chair	Goeff Boldt, Treasurer	Cathy Fultineer, Secretary
Stacy Owens, Development Chair	Lee Ayers	Keyan Botsford	
Jacquelyn Bunick	Doug Diehl	Vanessa Espino	
Brent Hackwell	Melissa Markos	Kylie Padget	

City of Ashland Social Service Grant Program

Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Community Works **DATE:** 2/2/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 2594 E. Barnett Rd., Ste. C Medford, OR 97504
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Dunn House Shelter

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Assistance to obtain and/or maintain housing

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ 12,000
GRANT CONTACT (If other than Executive Director listed below)
Name _____
Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION
Name Barbara Johnson, Executive Director
Telephone 541-779-2393 x202 **E-mail** bjohnson@community-works.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Deborah McQueen
Signature of Board President

Barbara Johnson
Signature of Executive Director/CEO

Debbie McQueen, Board Chair
Type Name

Barbara Johnson, Executive Director
Type Name

1

SUMMARY INFORMATION

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

1. **Program/project is:** **new** ☐ **established/continuing** ☑
   pilot ☐ **If pilot, expected duration** _____

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*

   The Dunn House Shelter serves survivors who are homeless or at imminent risk of homelessness due to domestic violence, sexual assault, stalking, and human trafficking throughout Jackson County, Oregon, including residents of Ashland. For more than 50 years, the Dunn House Shelter has been the only emergency shelter in Jackson County specifically designated for survivors of interpersonal violence. Those who seek shelter at the Dunn House have no safe alternatives.

3. What will this funding enable?

   This funding will support the operation of the low-barrier Dunn House Shelter and 24/7 HelpLine to access the shelter ensuring immediate safety for 250 survivors every year, half of whom are children. Staffed 24/7 by Community Works Certified Advocates trained in trauma-informed, services, the shelter fosters healing. Advocates provide housing advocacy to address barriers such as poor rental history or language access so survivors can transition to permanent, safe housing.

4. Number of volunteers this program/project will engage: 23

   Number of paid program employees this program/project will engage: 9

5. Total number volunteer's agency utilizes: 35

   Total number of paid agency employees: 39

6. Outline key strategies of the project/program with timeline and staff structure.

   The Dunn House is a low-barrier shelter with Certified Advocates on site 24/7. It provides immediate safety and comprehensive supportive services to stabilize survivors and support their transition into safe and sustainable housing. Key strategies include trauma--informed support, provision of basic needs, and individualized safety planning. Community Works Housing Advocates meet with each resident and complete a housing needs assessment, identify and reduce housing barriers, support in navigating and obtaining housing, provide financial assistance for move-in costs, offer life skills education, and provide basic household items for newly housed survivors. Once in permanent housing, advocates continue providing life skills support and advocacy to promote housing stability and long-term success. The Dunn House is open year-round with a low staff-to-resident ratio that ensures individualized, timely support.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

   The Dunn House Shelter is the first critical step in a survivor's path to safety, stability, and permanent housing. Dunn House provides the stability needed to begin working toward long-term housing and independence. In addition to operating the Dunn House Shelter, Community Works delivers comprehensive, wraparound services through staff embedded full-time within community systems, including DHS, the courthouse, law enforcement agencies, the Children's Advocacy Center, Community Justice, SOU, and Rogue Community College.
   Community Works has our own transitional housing and is building more to ensure survivors have access to dedicated housing paired with supportive services. Together, emergency shelter, transitional housing, system-based advocacy, and ongoing supportive services form an ecosystem of care. Each year, Community Works serves approximately 2,000 individuals in person and responds to more than 12,000 callers through our 24/7 crisis line.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. **mission statement, purpose(s) and how this program/project fits with your mission.**
b. **your organization's unique qualifications to accomplish your program outcomes?**
c. **what approach is your agency taking to serve clients and train staff on trauma informed care?**

2. What:

a. **issues(s) is the project/program intended to impact,**
b. **strategy for change your program will be based on,**
c. **evidence that the project/program will be successful in the proposed setting, and**
d. **what tool(s) will you use to measure outcomes?**

3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1a. Community Works mission is to bring hope, support, and empowerment to those impacted by violence. All individuals we serve are survivors of domestic violence, sexual assault, stalking, and/or human trafficking, and nearly all are homeless or at risk of homelessness as a direct result of the abuse they have experienced. Community Works was founded in 1996 through the merger of three organizations doing this work since the 1970's. Our purpose is to provide a comprehensive safety net for survivors by addressing immediate crisis and long-term stability, including crisis intervention, advocacy, and permanent housing. The Dunn House Shelter is central to our mission, offering immediate crisis intervention and safety through emergency shelter while also serving as the entry point to longer-term housing services and support.

1b. Community Works is recognized by the DOJ, DHS, and local systems as the only agency in Jackson County providing a full continuum of survivor specific services, including shelter, advocacy, and housing, for survivors in our community. Our programs are designed exclusively for survivors. All staff are Certified Advocates, required by Oregon statute, with the training and expertise to effectively support survivors.

1c. Community Works is deeply committed to survivor-centered care. All staff are required to complete the state Certified Advocate training which includes trauma-informed care, anti-oppression practices, and cultural responsiveness. Advocates apply this training by recognizing the impacts of complex trauma, prioritizing survivor autonomy, and providing individualized supportive services. This approach promotes healing, dignity, and empowerment while supporting survivors in achieving lasting safety and stability.

2a. Interpersonal violence remains a critical issue in Oregon, with more than one in three women having survived domestic violence and nearly half having survived sexual assault - both higher than national averages. These numbers are more staggering for those from marginalized communities. Domestic violence accounts for 70% of female homicides statewide. Jackson County is a hub of human trafficking - both sex and labor, and the rates of trafficking in our community have grown to a state of emergency.
Domestic violence is a primary driver of homelessness. Women report domestic violence as the immediate cause of their homelessness 22-57% of the time, and 38% of domestic violence survivors experience homelessness at some point in their lives. Beyond housing instability, survivors face significant mental and physical health consequences that result in long-term trauma, chronic health conditions, and severe psychological harm. Without access to safe housing and trauma-informed support, survivors are at heightened risk of continued abuse, homelessness, and long-term instability.

RECIPIENT AGENCY Community Works
PROGRAM/PROJECT TITLE Dunn House Shelter

Continue from previous page (if needed):

2b. Community Works' strategy for change is grounded in a proven model: low-barrier, safe housing paired with comprehensive, survivor-centered advocacy services. Services are voluntary and survivor-led. This approach is essential to obtain housing and remaining housed. The Dunn House operates as a low-barrier shelter designed to rapidly rehouse survivors fleeing violence. There are no documentation, income, sobriety, or gender requirements, and the shelter is accessible 24/7 through Community Works HelpLine crisis line - a critical first step in accessing safety. While at the shelter, residents work closely with Community Works' housing advocates who assess clients' needs, goals, and barriers, then provide hands-on support navigating the affordable housing market and supporting survivors in obtaining housing stability.

To further strengthen outcomes, Community Works opened Mary's Haven two years ago - the first transitional housing for survivors in Jackson County. Mary's Haven provides housing for survivors leaving the Dunn House for up to two years coupled with on-site supportive services. Community Works has secured the land for additional housing and is actively expanding hosing capacity to address the affordable housing crisis by creating safe, dedicated housing options for survivors in our community.

2c. The Dunn House Shelter maintains 100% occupancy, demonstrating the urgent need for survivor-specific housing. Community Works' model aligns with the evidence that shows housing first coupled with supportive services is critical to achieve and maintain housing. Staff are on-site 24/7 and continue providing services after survivors transition into long-term housing. Program success is measured by the number of people served, nights of shelter provided, safety plans, support and education group participation, basic needs assistance provided, and the percentage of residents who transition into and maintain safe housing.

2d. Client satisfaction and safety are assessed through confidential client feedback forms in the language of their choice to inform service improvements. Results are reviewed by the management team at least quarterly. In the last fiscal year, 99% of residents reported that services increased their knowledge of safety planning, helped them make informed decisions, and connected them with vital resources.

All client services are tracked in a secure database, Osnium, enabling outcome analysis and quarterly reporting to funders. This data-driven approach ensures accountability and continuous program improvement. Feedback from clients is a primary driver of program adjustments, with changes incorporated into the agency’s three-year strategic plan or addressed immediately if urgent.

3. Domestic and sexual violence carry substantial costs for healthcare, law enforcement , employers, and social services. A stay for a resident at our Dunn House Shelter costs $2,300 on average, a cost-effective alternative compared with the $35,000 average annual cost of chronic homelessness, as domestic violence is named as the most common reason women become homeless. Our services reduce these public costs while increasing safety and stability.

Community Works collaborates closely with law enforcement, healthcare, DHS, housing providers, and the Jackson County Continuum of Care (CoC). As the only agency providing a full continuum of survivor specific services, our organization plays a central role in the local safety net and housing response system in our community. For over a decade, Community Works has partnered with all Jackson County law enforcement agencies on the Lethality Assessment Program (LAP), a nationally recognized, evidence-based model that reduces domestic violence homicides. Every officer is trained to contact Community Works through a dedicated 24/7 law enforcement line, answered by Certified Advocates at the Dunn House, ensuring immediate safety planning and access to emergency housing. Annually, LAP serves 400 high-risk victims, the majority of whom experienced strangulation, a leading precursor to homicide.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2023-06/2024

   b. Administration & Fundraising expense: $ 733,805 20 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

   c. Program expense $ 2,784,831

   d. **Total expenses**: **$** 3,518,636

   e. Sources of **revenue**:

Memberships/ individual contributions	$ 362,849	9 %
Raised through fundraising activities	$ 267,000	7 %
Government	$ 1,878,633	48 %
Foundations	$ 1,280,323	33 %
United Way	$ 10,000	less than 1 %
Fees for Service	$ 0	0 %
Other (reimbursements, payments, bequests, etc.)	$ 98,201	3 %

   f. **Total revenue**: **$** 3,897,006

2. What is the highest level of financial reporting required by your funders?
   Community Works is required to have a single audit, due to the federal funding amount received.

3. Briefly describe your sustainability outlook for the project/program in the future.
   Community Works' sustainability outlook for the Dunn House Shelter is strong and well established. The shelter receives stable, non-competitive state and federal funding allocated annually through the Department of Justice, ensuring consistent baseline support for ongoing operations. In addition, committed local philanthropic partners contribute reliable annual funding, including the Hearts & Vines Foundation, which provides nearly 10% of the shelter's annual operating budget.

4. a. Total organizational annual budget **current ongoing** fiscal year: 3,447,818

   b. Total program/project budget current ongoing fiscal year: 1,236,523

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, **2026,** to June 30, **2027**(*If Applicable)

RECIPIENT AGENCY Community Works

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$40,000	$
City of Ashland Funds	$12,000	$
Jackson County Funds	$	$119,955
CDBG (identify)	$	$
Other State or Federal Funds	$210,000	$2,321,805
United Way Funds	$10,000	$
Other Funds (identify) Foundations & Donations	$1,206,694	$
SUB TOTALS	$1,478,694	$2,441,360
TOTAL REVENUE (Pending & Secured)		**$3,920,054**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$2,036,245
Total Benefits		$399,428
TOTAL PERSONNEL SERVICES		**$2,435,673**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Travel & Training		$25,238
Equipment & Supplies		$59,690
Client Assistance (Essential Basic Needs, Groceries, Rental Assistance, Utilities)		$299,793
Facilities, Communication, & Insurance		$190,212
Contractual, Professional Services, & Other Expenses		$437,212
Administrative		$472,236
TOTAL MATERIALS & SERVICES		**$1,484,381**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$0
Furnishings		$0
Other capital expenses /Identify:		$0
TOTAL CAPITAL OUTLAY		**$0**
TOTAL EXPENDITURES (Sum of A, B & C)		**$**

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, **2026** to June 30, **2027 (*If Applicable)**

RECIPIENT AGENCY Community Works

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$40,000	$
City of Ashland Funds	$12,000	$
Jackson County Funds	$	$
CDBG (identify)	$	$
Other State or Federal Funds	$	$903,771
United Way Funds	$9,000	$
Other Funds (identify): Foundations & Donations	$271,752	$
SUB TOTALS	$332,752	$903,771
TOTAL REVENUE (Pending & Secured)		**$1,236,523**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$699,777
Total Benefits		$132,549
TOTAL PERSONNEL SERVICES		**$832,326**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Travel & Training		$9,488
Equipment & Supplies		$39,358
Client Assistance (Essential Basic Needs, Groceries, Rental Assistance, Utilities)		$30,835
Facilities, Communication, & Insurance		$78,450
Contractual, Professional Services, & Other Expenses		$72,464
Administrative		$173,602
TOTAL MATERIALS & SERVICES		**$404,197**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$0
Furnishings		$0
Other capital expenses /Identify:		$0
TOTAL CAPITAL OUTLAY		**$0**
TOTAL EXPENDITURES (Sum of A, B & C)		**$**

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

I.

		# Whole Program	*# Ashland*
Gender			
Age*	Female	176	14
	Male	55	0
II.	Other	18	0
	Totals		
	0 to 5	50	2
	6 to 12	47	4
	13 to 17	21	3
	18 to 30	50	0
	31 to 40	39	1
	41 to 50	19	1
	51 to 61	15	3
	62 +	8	0
	Unknown	0	0
	Total	249	14

***at point of entry for service**

IV. Race/Ethnicity

	#Whole Program	*Ethnicity Hispanic/Latino**	*# Ashland*
White	181		10
Black/African American	18		4
American Indian/Alaskan Native	7		
Native Hawaiian/other Pacific Islander	4		
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial	7		
Other	32	32	
Totals	249	32	14

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

The totals for gender listed above are 249 for the Whole Program and 14 for the City of Ashland. The data provided is only for the Dunn House Shelter, and not for the entire Community Works agency.

Agency Board Profile

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

1. **Number of board members required in bylaws?** **Minimum** 9 **Maximum** 17
2. **Number of board members currently active?** **# Voting** 13 **Vacancies** 0
3. **Average percentage board meeting attendance (over last completed year):** 66 **%**
4. **Percent of board in attendance required for a quorum:** 50 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
Executive	5
Finance	6
Development	13

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	11	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other	2	1
Totals	13	1

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

COMMUNITY WORKS
Domestic Violence · Sexual Abuse · Sex Trafficking
RESOURCE CENTER

2594 E. Barnett Rd - C
Medford, OR 97504
(541) 779-2393
(541) 779-3317 FAX

Barbara Johnson
541-821-8582

ROSTER
Board of Directors
FY 2025-2026

MEMBER NAME	ADDRESS/PHONE	TERM/COMMITTEE(S)
Debbie McQueen (Bob) **BOARD CHAIR** **Retired Health Care**	417 S. Central Valley Drive Central Point, OR 97502 (541) 821-0696 Bobdeb51@gmail.com	**1st Term:** 07/01/19-06/30/22 **2nd Term:** 07/01/22-06/30/25 **Committees:** Development, Executive **Skills:** Healthcare profession
Kevin Sanders (Terry) **VICE BOARD CHAIR** Operations Manager Corey Robbins Painting Company	PO Box 1242 Talent, OR 97540 (541) 951-1955 **kevin@coreyrobbins.com**	**1st Term:** 5/25/2016-06/30/2019 **2nd Term:** 7/1/19-06/30/22 **Bylaw Extension:** 7/1/22-06/30/26 **Committees:** Development, Executive **Skills:** Building and painting
Geoff Boldt **TREASURER** Oregon Pacific Wealth Management	2832 Rosemont Ave Medford, OR 97504 (541)890-8328 **Geoff.Boldt@oregonpacificwealth.com**	**1st Term:** 01/01/25-06/30/28 **2nd Term:** **Committees:** **Skills:** Economics, Finance
Cathy Fultineer (Rod McLeod) Consulting Chief Marketing Officer **SECRETARY**	2337 Hillside Drive Central Point, OR 97502 (541)261-5499 **cathyjfultineer@gmail.com**	**1st Term:** 07/01/20-06/30/23 **2nd Term:** 07/01/23-06/30/26 **Committees:** Development, Executive **Skills:** Business, marketing
Keyan Botsford Orthodontist/Business Owner Botsford Family Orthodontics	4006 Fieldbrook Avenue Medford, OR 97504 (925) 984-7223 keyanbotsford@gmail.com	**1st Term:** 2/01/23-6/30/26 **2nd Term:** **Committees:** Development **Skills:** Networking, community connections
Jacquelyn Bunick Attorney Jarvis, Dryer, Gilatte, & Larsen, LLP	2850 Shanteal Pl Medford, OR 97504 (217) 840-1521 **jbunick@medfordlaw.net**	**1st Term:**1/08/20-6/30/23 **2nd Term:** 07/01/23-6/30/26 **Committees:** Development **Skills:** Legal
Doug Diehl (Patti) Doctor & Medical Administrator Retired	3938 Piedmont Terrace Medford, OR 97504 (541) 951-1295 (c) **dreammd474@gmail.com**	**1st Term**: 11/4/2020 – 06/30/2023 **2nd Term:** 07/01/23-06/30/26 **Committees:** Business **Skills:** Healthcare professional
Vanessa Espino Victim Advocate District Attorney Office	3306 S Pacific Highway #97 Medford, OR 97501 (541)944-4610 **EspinoVI@jacksoncounty.org**	**1st Term**: 10/01/22 – 06/30/2025 **2nd Term:** 07/01/25-6/30/2028 **Committees:** Business **Skills:** Advocacy, Customer Service

Brent Hackwell (Danielle) Chief Operating Officer KOGAP	P.O. Box 1117 Jacksonville, OR 97530 (541)941-1172 **bvh@kogap.com**	**1st Term:** 02/01/21-06/30/24 **2nd Term:** 07/01/24-06/30/27 **Committees:** Development **Skills:** Business and Construction
Melissa Markos (Gulielmo Brunese) Non-Profit Management ACCESS/Jackson County Continuum of Care	10 E South Stage Road SPC 308 Medford, OR 97501 (541)840-4016 **mmarkos@accesshelps.org**	**1st Term: 06/01/25-06/30/28** **2nd Term:** **Committees:** **Skills:** Non-Profit Budget, Management, Grant Writing, Program, Fundraising, Leadership
Stacy Owens (Rich) Teacher, St. Mary's	890 Bybee Drive Jacksonville, OR 97530 (541)660-1774 **Stacyownes0807@gmail.com**	**1st Term:** 03/01/24-06/30/27 **2nd Term:** **Committees:** **Skills:** Program Management, Problem Solving, Time Management & Training8
Kylie Padget Pelvic Floor Physical Therapist, Asante	1239 Shafer Lane Medford, OR 97501 (541)993-5248 **Kylie.padget@gmail.com**	**1st Term:** 05/01/25-06/30/28 **2nd Term:** **Committees:** **Skills:** Healthcare and fundraising
Lee Ayers Preboski Education – Criminologist, Emeritus Faculty SOU	900 Butler Creek Road Ashland, OR 97520 (541)821-1508 **ayersL@sou.edu**	**1st Term:** 11/01/25-06/30/28 **2nd Term:** **Committees:** **Skills:** Policy, Analysis, Grant Writing, Strategic Planning,

Internal Revenue Service

District
Director

Department of the Treasury

300 N. Los Angeles Street, MS 7043
Los Angeles, CA 90012

COMMUNITY WORKS, INC.
900 E MAIN STREET
MEDFORD, OR 97504-7136

Person to Contact:
L BARRAGAN
Telephone Number:
(213) 894-2336
Refer Reply to:
EO(0407)98
Date:
APRIL 15, 1998

EIN: 93-0633804

Dear Taxpayer:

This letter is in response to your request for a copy of the determination letter for the above named organization.

Our records indicate this organization was recognized to be exempt from Federal Income Tax in FEBRUARY 1982 as described in Internal Revenue Code Section 501(c)(3). It is further classified as an organization that is not a private foundation as defined in Section 509(a) of the Code, because it is an organization described in Section 170(b)(1)(A)(vi).

The exempt status for the determination letter issued in FEBRUARY 1982 continues to be in effect.

If you need further assistance, please contact our office at the above address or telephone number.

Sincerely,

L. Barragan

Disclosure Assistant

Community Works
Balance Sheet
Community Works - 2024/2025

	Jun - 25	May - 25	Jun - 24
Assets			
Current Assets			
Cash	1,013,440	1,131,983	883,887
Investments	1,384,542	1,365,398	1,293,147
Accounts Receivables	496,584	374,955	361,564
Promises to Give	180,800	195,828	180,376
Other Current Assets	12,114	11,350	29,561
Total Current Assets	3,087,479	3,079,514	2,748,536
Fixed Assets			
Land	53,208	53,208	53,208
Buildings	523,813	523,813	523,813
Equipment	64,670	64,670	64,670
Furniture & Fixtures	30,121	30,121	30,121
Construction in Progress	4,505	4,505	1,482,663
Accumulated Depreciation	(506,216)	(504,416)	(483,065)
Total Fixed Assets	170,101	171,901	1,671,411
Other Long Term Assets			
Endowment Fund Held in Perpetuity	5,000	5,000	5,000
ROU Assets - Operating Leases	193,270	199,790	251,187
Total Other Long Term Assets	198,270	204,790	256,187
Total Assets	3,455,850	3,456,205	4,676,133
Liabilities & Fund Balance			
Current Liabilities			
Accounts Payable	36,539	32,983	65,977
Payroll Liabilities	151,783	157,799	146,447
Deferred Revenues	367,279	425,410	285,269
ROU Current Liabilities - Operating Leases	81,588	74,226	69,617
Other Current Liabilities	400	0	(25)
Total Current Liabilities	637,589	690,417	567,285
Long Term Liabilities			
ROU Long-Term Liabilities - Operating Leases	118,060	131,937	187,363
Total Long Term Liabilities	118,060	131,937	187,363
Fund Balance			
Fund Balance	2,700,200	2,633,850	3,921,486
Total Fund Balance	2,700,200	2,633,850	3,921,486
Total Liabilities & Fund Balance	3,455,850	3,456,205	4,676,133

Community Works
Income Statement
Community Works - 2024/2025

	Agency Jul 24 - Jun 25	2024/2025 Budget	% of Budget	FYE 2023/2024 Actual
Revenue				
Government Revenue	2,824,352	2,874,240	98%	2,600,910
Foundation Revenue	135,101	457,333	30%	406,731
Development Revenue	787,578	402,630	196%	854,326
Misc. Revenue	162			
Total Revenue	3,747,193	3,734,203	100%	3,861,968
Expenses				
Personnel	2,072,035	2,096,424	99%	1,936,736
Fringe Benefits	363,233	391,261	93%	332,187
Travel & Training	24,354	27,600	88%	37,967
Equipment	2,636			
Supplies	63,456	28,680	221%	39,682
Groceries	13,190	8,000	165%	16,314
Contractual	12,970	18,764	69%	13,093
Client Assistance	365,840	296,592	123%	521,016
Facilities	174,600	181,020	96%	174,042
Insurance	24,376	24,573	99%	19,666
Professional Services	258,982	163,000	159%	181,062
Other Expenses	87,006	89,400	97%	162,200
Admin Allocation				
Total Expenses	3,462,677	3,325,314	104%	3,433,965
Net Operating Income	284,515	408,889	70%	428,003
Other Income and Expenses				
Depreciation Expense	(23,152)	(27,450)	84%	(24,702)
Investment Revenue	115,185			129,147
Bank & Investment Fees	(15,433)	(12,000)	129%	(16,252)
Net Assets Released from Restrictions				(97,300)
Total Other Income and Expenses	76,601	(39,450)	(194%)	(9,106)
NET SURPLUS/(DEFICIT)	**361,116**	**369,439**	**98%**	**418,897**

sorren
CPAs P.C.

INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

To the Board of Directors
Community Works, Inc.
Medford, OR 97504

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*), the consolidated financial statements of Community Works, Inc. (the Organization), which comprise the Organization's consolidated statement of financial position as of June 30, 2025 and the related consolidated statements of activities, functional expenses and cash flows for the year then ended, and the related notes to the consolidated financial statements (collectively, the financial statements), and have issued our report thereon dated December 3, 2025.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Organization's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Organization's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards.*

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Ph: (541) 773-6633
sorren.com

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Sorren CPAs P.C.

Sorren CPAs P.C.
Medford, Oregon
December 3, 2025

sorren CPAs P.C.

INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM AND REPORT ON INTERNAL CONTROL OVER COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE

To the Board of Directors
Community Works, Inc.
Medford, OR 97504

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited Community Works, Inc.'s (the Organization) compliance with the types of compliance requirements identified as subject to audit in the *OMB Compliance Supplement* that could have a direct and material effect on each of the Organization's major federal programs for the year ended June 30, 2025. The Organization's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, Community Works, Inc. complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal program for the year ended June 30, 2025.

Basis for Opinion on Each Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards);* and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the Organization and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of the Organization's compliance with the compliance requirements referred to above

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to the Organization's federal programs.

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Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the Organization's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards,* and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the Organization's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards,* and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.

- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the Organization's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.

- Obtain an understanding of the Organization's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control Over Compliance

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Sorren CPAs P.C.

Sorren CPAs P.C.
Medford, Oregon
December 3, 2025

City of Ashland Social Service Grant Program

Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Jackson County SART **DATE:** 02/13/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 2305 Ashland Street #104-418 Ashland OR 97520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Survivor Care Program

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Access to housing/mental health/substance use services

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ $ 12,000

GRANT CONTACT (If other than Executive Director listed below)

Name Judith Rosen

Telephone (541) 840-8063 **E-mail** development@jacksoncountysart.org

EXECUTIVE DIRECTOR INFORMATION

Name Ava Derosier

Telephone (541) 951-4250 **E-mail** ava@jacksoncountysart.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Maylee Oddo Digitally signed by Maylee Oddo Date: 2026.02.13 13:24:11 -08'00'
Signature of Board President

Maylee Oddo
Type Name

Ava DeRosier Digitally signed by Ava DeRosier Date: 2026.02.13 13:24:44 -08'00'
Signature of Executive Director/CEO

Ava DeRosier
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

1. **Program/project is:** **new** ☐ **established/continuing** ☑
   pilot ☐ **If pilot, expected duration** _____

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*

   Adult and youth survivors (15+) of sexual assault and domestic/intimate partner violence (DV/IPV) in Ashland.

   The project will also train 110+ Ashland medical, law enforcement, emergency rescue and social service personnel on survivor-centered and trauma-informed responses to this population.

3. What will this funding enable?

   Funding will help sustain our core services for immediate and ongoing survivor care. Medical staff/first responser trainings will focus on our recent expansion into DV immediate care, which meets a longstanding need in our area.

4. Number of volunteers this program/project will engage: 2

   Number of paid program employees this program/project will engage: 17

5. Total number volunteer's agency utilizes: 5

   Total number of paid agency employees: 20

6. Outline key strategies of the project/program with timeline and staff structure.

   Our program works to relieve the destructive mental, physical and financial impact of gender violence and help survivors heal. Specially-trained Forensic Nurse Examiners (FNEs) help them stabilize, connect them to advocacy and inform them about options and resources; our Resource Specialist secures aftercare services like stable housing and behavioral health care vital to their long-term recovery. Extensive partner collaborations pool resources and coordinate care. In-house trainings keep staff abreast of current best practices and survivors' medical/cultural/social service needs; community trainings help build a more knowledgeable, trauma-informed response to these survivors, especially across first response/medical/social service fields Our program is fully-developed and staffed and our expansion opened fully this January. Our Program Manager supervises our 15 on-call nurses and oversees their training and continuing education.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

   a. Please note that each Ashland person served often receives multiple dozens of hours of aid and ongoing support, especially those needing to secure safe (scarce) affordable housing and/or behavioral health care.

   b. Like many small nonprofits, we use the cash basis method of accounting and are primarily grant-funded. As a result, our records do swing between deficit and surplus depending on the time of year grants come in: (-$70,341) in 2022, when our early costs were covered by substantial grants received in late 2021, which had a $184,686.89 surplus; a net gain of $96,476 in 2023; (-$54,630) in 2024, the year covered in General Financial Info; and a $5,030.69 gain in 2025.

   c. Org and Program Budget pages did not enable final expenditure totals ($699,399; $390,495)

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. **mission statement, purpose(s) and how this program/project fits with your mission.**
b. **your organization's unique qualifications to accomplish your program outcomes?**
c. **what approach is your agency taking to serve clients and train staff on trauma informed care?**

2. What:

a. **issues(s) is the project/program intended to impact,**
b. **strategy for change your program will be based on,**
c. **evidence that the project/program will be successful in the proposed setting, and**
d. **what tool(s) will you use to measure outcomes?**

3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1a. Founded in 2004, Jackson County SART works to ensure an effective, compassionate and collaborative response to sexual and domestic violence that prioritizes survivors' needs and to prevent this violence through community engagement and change. Our project furthers our mission by strengthening our best-practice care, solidifyng its expansion to DV/IPV survivors and training community partners in trauma-informed response.

1b. United Way's Executive Director, Dee Anne Everson, calls ours "the most respected sexual assault response team in our state." The forensic nurses who staff our immediate medical response are state-trained and certified in responding to the physical and psychological effects of sexual assault and domestic violence and in caring for vulnerable/underserved populations. Our Resource Specialist is an experienced advocate with extensive expertise in crime victims' rights and affordable housing/behavioral health resources. She helps survivors navigate complex, often-fragmented support systems to access the services they need.

1c. We have long led efforts to understand trauma's impacts and to promote trauma-informed practices in our state. (In introducing her bill to mandate trauma-informed training for law enforcement (HB 2575), OR Representative Pam Marsh credited our work as her inspiration.) We conduct local and regional trainings on the neurobiology of trauma and the importance of trauma-informed care; we also train our own staff regularly and integrate this knowledge into all our policies, procedures and survivor interactions.

2a. Emergency departments are often the first – and sometimes the only – contact that survivors of domestic violence have with the healthcare system. Studies suggest that up to 38% of female emergency patients have experienced domestic abuse within the past year. Yet staff tend to focus solely on treating immediate injuries, without addressing or even recognizing their underlying cause – or patients' equally urgent psychological and social needs. "They patched me up," one survivor told us. "But that was it. I swore I'd never go back."

These missed opportunities have left patients in danger.

Like rape-related trauma, the trauma that DV survivors experience increases their risk of long-term mental and physical harm. Non-lethal strangulation occurs in 38% of DV incidents and, while it often leaves no visible marks, can prove deadly if not recognized and treated. And harm often escalates: DV has been linked to 69% of female homicides in Oregon.

RECIPIENT AGENCY Jackson County SART
PROGRAM/PROJECT TITLE Survivor Care Program

Continue from previous page (if needed):

Furthermore, as offenders generally prey on the vulnerable, many survivors have already-existing trauma and complex needs that must be addressed before they can begin to heal. About 80% of the DV and sexual assault survivors we serve live on low-incomes. Half are unhoused or housing unstable. Roughly 30% have coexisting, often previously undiagnosed mental health issues, and 40% have a drug/alcohol dependency. Few have the resources to cope with recovery on their own.

2b. Studies show that survivors who receive a compassionate, comprehensive, trauma-informed first response are significantly less likely to suffer long-term psychological and physical harm. Survivors tell us repeatedly that our nurses, unlike traditionally-trained medical staff, lessened their sense of isolation and shame and helped them understand both the trauma they were experiencing and their rights and options regarding their cases and their care. Many say our response restored a sense of trust and control, increasing their willingness to seek further services like follow-up care -- a key predictor of future well-being. For DV survivors not ready or able to leave their abuser – it takes seven attempts on average – a knowledge of options and resources can offer a crucial future lifeline.

Many DV survivors need resources like a safe place to stay before they can leave. We know that resource availability is not the same as access; traumatized survivors seldom have the mental and emotional bandwidth to navigate complex bureaucracies to find the help they need. So our first response serves as an on-ramp, not an end-point; a connection to advocacy and partners' existing DV services, free medical follow-up and our Resource Specialist for ongoing aid.

2c. For over 20 years we have provided free, immediate care, forensic evidence collection and resource connection to all sexual assault survivors requesting it. 100% of survey respondents say our care helped them make informed choices about their situation and path forward; 98% say our Resource Specialist helped them get the follow-up care and services they needed. DV responses are too small yet to be statistically significant, but look promising so far.

2d. We regularly document service outcomes using survivor surveys, Program Manager debriefs of cases and her program operations reviews, We also survey our training participants. Our Medical Consultant reviews program policies, procedures and case response. as well.

3. Our program:
• Can reduce long-term physical, psychological and financial harms for a large part of our community. Sexual violence impacts half of all women and 1 in 3 men; for DV it's 1 in 3 and 1 in 4 respectively (CDC). Rates for LGBTQIA+, BIPOC and disability communities are even higher.
• Reduces community costs of violence-related substance use, job loss, mental/physical health issues.
• Increases general public safety. Over half of all mass shootings involve domestic violence.
• Helps extend partner agencies' strengths and increase survivors' access to resources and support by integrating our services with others'. Community Works provides advocates for our sexual assault response; we connect DV survivors to their shelter; our Resource Specialist's focus on time-consuming social services navigation lets their advocates concentrate on crucial emotional support. We coordinate case management and share resources with health /behavioral health clinics, drug and alcohol service agencies and agencies working with the unhoused. Agencies often split housing costs with us for clients, helping our Resource Specialist secure safe, permanent housing for 20+ low-income Ashland survivors a year.
• Increases trust in public systems (healthcare, law enforcement, justice) and community engagement with them. We doubled sexual assault survivors' reporting rates to police within four years of our original program's start.
• Supports the legal process with expert evidence collection, documentation and trial testiny.
• Can help create a more uniform, cohesive and knowledgeable response to trauma among first responder, hospital and social services staff.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): 01/2024 - 12/2024

   b. Administration & Fundraising expense: $ 171,824 25 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

   c. Program expense $ 526,540

   d. **Total expenses**: **$** 698,364

   e. Sources of **revenue**:

Memberships/ individual contributions	$ 100,570	16 %
Raised through fundraising activities	$	%
Government	$ 185,640	29 %
Foundations	$ 242,234	37 %
United Way	$ 15,000	2 %
Fees for Service	$ 100,290	16 %
Other (reimbursements, payments, bequests, etc.)	$	%

   f. **Total revenue**: **$** 643,734

2. What is the highest level of financial reporting required by your funders?
   Financial statement plus 990

3. Briefly describe your sustainability outlook for the project/program in the future.
   Federal/state cuts were a challenge. We have scaled back our in-school prevention work to reduce costs and stabilize our Survivor Care Program; we secured funding from multiple new foundation partners; and we increased individual donations. Fortunately we have healthy reserves and can count roughly $328K in service fees (from hospitals, not survivors), hospital foundation support and recurring donations as highly likely income. Needless to say, your support is especially crucial this year.

4. a. Total organizational annual budget **current ongoing** fiscal year: 717,750

   b. Total program/project budget current ongoing fiscal year: 390,474

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, **2026,** to June 30, **2027**(*If Applicable)

RECIPIENT AGENCY Jackson County SART

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$ 12,000	$
Jackson County Funds	$ 7,000	$ 7,000
CDBG (identify)	$	$
Other State or Federal Funds	$ 32,100	$ 46,405
United Way Funds	$ 15,000	$
Other Funds (identify) Fndn, donor, program income	$ 579,834	$
SUB TOTALS	$ 645,934	$ 53,405
TOTAL REVENUE (Pending & Secured)		**$ 699,339**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 492,382
Total Benefits		$ 104,858
TOTAL PERSONNEL SERVICES		**$ 597,240**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Insurance, accounting		$ 25,500
Continuing ed, certification/registration, professional fees/dues, FNE supplies		$ 10,150
Communication costs, website, Osnium data management, FNE secure platform		$ 7,800
Office rent/utilities, supplies, phones, postage, PO		$ 31,852
Community outreach, translation, fundraising		$ 12,297
Client assistance		$ 12,000
TOTAL MATERIALS & SERVICES		**$ 99,599**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$ 2,500
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$ 2,500**
TOTAL EXPENDITURES (Sum of A, B & C)		**$**

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, **2026** to June 30, **2027** **(*If Applicable)**

RECIPIENT AGENCY Jackson County SART

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$ 12,000	$
Jackson County Funds	$ 7,000	$ 7,000
CDBG (identify)	$	$
Other State or Federal Funds	$ 32,100	$ 46,405
United Way Funds	$ 15,000	$
Other Funds (identify) Fdn, donor, program income	$ 270,990	$
SUB TOTALS	$ 337,090	$ 53,405
TOTAL REVENUE (Pending & Secured)		**$ 390,495**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 301.314
Total Benefits		$ 51,971
TOTAL PERSONNEL SERVICES		**$ 353,285**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Continuing education/training, certification, Medical Director		$ 5,650
Malpractice insurance, 24/7 answering service, med supplies, FNE communication platform		$ 6,950
Office rent/utilities, Osnium data system		$ 9,150
Staff cell phones, mileage		$ 2,460
Client assistance		$ 12,000
		$
TOTAL MATERIALS & SERVICES		**$ 36,210**
C.CAPITAL OUTLAY **(must constitute part or all of funded public service activity to be eligible expense)**		
Equipment		$ 1,000
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$ 1,000**
TOTAL EXPENDITURES (Sum of A, B & C)		**$**

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

I. **Gender**

		# Whole Program	*# Ashland*
Age*	Female	314	52
	Male	15	8
II.	Other	4	1
	Totals		
	0 to 5		
	6 to 12	2	1
	13 to 17	34	3
	18 to 30	114	24
	31 to 40	67	15
	41 to 50	57	9
	51 to 61	42	3
	62 +	12	5
	Unknown	5	1
	Total	333	61

***at point of entry for service**

IV. Race/Ethnicity

	#Whole Program	*Ethnicity Hispanic/Latino**	*# Ashland*
White	270	39/ 9	54
Black/African American	4		2
American Indian/Alaskan Native	2		1
Native Hawaiian/other Pacific Islander	4		
American Indian/Alaskan Native and White			1
Black/African American and White American Indian/Alaskan Native and Black/African American			
Other Multi Racial	4		1
Other	49		2
Totals	333	39/ 9	61

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Please note that these numbers record survivors served last year. They do not include the several hundred Ashland agency/community members served by our program-related trainings.

This year we expect to train 110+ Ashland medical/law enforcement/emergency response/social service staff on our DV services and on trauma-informed interactions with survivors.

Other Multi Racial = Asian
Other = Not Reported

Agency Board Profile

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

1. **Number of board members required in bylaws?** **Minimum** 5 **Maximum** 11
2. **Number of board members currently active?** **# Voting** 5 **Vacancies** 0
3. **Average percentage board meeting attendance (over last completed year):** 80 **%**
4. **Percent of board in attendance required for a quorum:** 50 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
Financial	2
Board Development	2 (1 + Ex Director)
Compliance/legal	2
Executive	3 (2 + Ex Director)

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	4	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other	1	
Totals	5	

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

JACKSON COUNTY
SART
SEXUAL ASSAULT RESPONSE TEAM
2305 Ashland Street, #104-418 – Ashland, OR 97520 – (541) 631-9941

Board of Directors

Maylee Oddo – Board President

Ashland, OR: (800) 523-6961, maylee@hycomb.com
Joined: 2012
Maylee Oddo is CEO for Hycomb LLC and served as Board President and Festival Director for the Ashland Independent Film Festival.

Alan Binette

Medford, OR: (541) 773-3018, abinettemd@hikerdoc.com
Joined: 2017
Alan Binette is a noted OB/GYN, retired, with a longstanding interest in nonprofit work.

Stefanie L. Burke

Medford, OR: (541) 779-8900, SLB@roguelaw.com
Joined: 2020
Stefanie Burke, an attorney with Hornecker Cowling LLP, specializes in Family Law Mediation.

Angela Eastman

Longmont, CO: angela.eastman@asante.org
Joined 2025
Angela Eastman is a Supervisor and Associate General Counsel for Asante Health System.

Michael Klein

Talent, OR: (503) 416-4771, michaelklein0525@gmail.com
Joined: 2021
Michael Klein (M.S.W.) is a Behavioral Health Provider at Ashland High School.

Hans Stroo

Ashland, OR: (541) 301-3583, hans@strooconsulting.com
Joined 2025
Hans Stroo (PhD) is a retired environmental scientist and researcher.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUL 29 2004

JACKSON COUNTY SART
C/O SUSAN MOEN
43 MORNINGLIGHT DR
ASHLAND, OR 97520

Employer Identification Number: [redacted] tax ID #
DLN: [redacted] Doc. locator # for IRS
Contact Person:
EVELYN D GRIFFITHS ID# 31432
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990 Required:
Yes
Effective Date of Exemption:
May 24, 2004
Contribution Deductibility:
Yes
Advance Ruling Ending Date:
December 31, 2008

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. During your advance ruling period, you will be treated as a public charity. Your advance ruling period begins with the effective date of your exemption and ends with advance ruling ending date shown in the heading of the letter.

Shortly before the end of your advance ruling period, we will send you Form 8734, Support Schedule for Advance Ruling Period. You will have 90 days after the end of your advance ruling period to return the completed form. We will then notify you, in writing, about your public charity status.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Letter 1045 (DO/CG)

SH 00 000000 200844 9345
R18135

140627 158

TE3 810650183

Department of the Treasury
Internal Revenue Service
EO Rulings and Agreements
P O BOX 2508
CINCINNATI OH 45201

Date of this notice: November 10, 2008
Notice Number: CP-158
Taxpayer Identification Number: [redacted]

005804.507087.0028.001 1 AT 0.346 705

Advance Ruling Period Ending Date:
December 31, 2008

JACKSON COUNTY SART
% SUSAN MOEN
43 MORNINGLIGHT DR
ASHLAND OR 97520-3614436

For assistance, call:
1-877-829-5500

005804

Our records indicate that you were issued an advance ruling letter that treated you as a public charity, rather than a private foundation, during an advance ruling period that ends on the date indicated above. That letter required you to file IRS Form 8734 at the end of your advance ruling period to establish that you qualify as a public charity.

New IRS regulations changed the procedures governing your public charity status. You are no longer required to file Form 8734 at the end of the ruling period. The regulations also provide that donors can rely on your advance ruling letter with respect to your public charity status unless the IRS changes that status, based on the organization no longer meeting an applicable public support test, and publishes notice of the change.

If you have received Form 8734 from the IRS, please do not file it. Please keep your advance ruling letter along with this letter for your permanent records.

The regulations also changed the rules for computing public support, consistent with the redesigned Form 990, Return of Organization Exempt from Income Tax. For more information regarding those rules and the redesigned Form 990, please see the IRS website at www.irs.gov/eo.

Jackson County SART
Profit & Loss
January through December 2025

		Jan - Dec 25
Ordinary Income/Expense		
Income		
Contribution		197,320.16
Fee for Service		82,774.60
Grants		455,330.85
Reimbursement		299.21
Savings Interest		4,436.10
Total Income		740,160.92
Gross Profit		740,160.92
Expense		
Administrative Expenses		
Accounting	8,362.62	
Admin Insurance Expense		
Board Insurance	2,672.00	
Worker's Comp Insurance	8,634.50	
Total Admin Insurance Expense		11,306.50
Admin Office Rent		3,800.00
Bank Service Charges		-105.37
Fees & Dues		8,628.79
Fundraising		
Printing	2,137.66	
Stamps	1,240.65	
Total Fundraising		3,378.31
Internet		799.96
Meeting Expenses		890.31
Office Equipment		165.00
Outreach/Awareness		
Tabling supplies	194.42	
Outreach/Awareness - Other	-500.00	
Total Outreach/Awareness		-305.58
Personnel Appreciation		176.96
Personnel Expenses		299.00
Postage		75.17
Printing		5.00
Supplies		
Office	464.29	
Supplies - Other	1,533.72	
Total Supplies		1,998.01
Telephone		
Admin Phones	360.00	
Telephone - Other	928.47	
Total Telephone		1,288.47
Training Fees		
Continuing Education	2,049.40	
Training Fees - Other	3,253.28	
Total Training Fees		5,302.68
Website		191.25
Total Administrative Expenses		46,257.08

Jackson County SART
Profit & Loss
January through December 2025

		Jan - Dec 25
Insurance		
Health Insurance		37,202.08
Total Insurance		37,202.08
Mileage		2,286.20
Payroll Expenses		
Gross Wages		
Associate Director	385.00	
Community Coordinator	929.50	
Continuing Education	2,716.80	
Dev/Ed Director	78,567.90	
Exam Fees	2,410.00	
Executive Director	89,437.79	
Preceptor	1,300.00	
Prevention Coordinator		
OregonSaves	0.00	
Prevention Coordinator - Other	45,283.14	
Total Prevention Coordinator	45,283.14	
Prevention Educator	71,276.50	
RS	70,957.51	
SANE On Call	48,106.77	
SANE Program Manager	81,315.00	
Training - Continuing Education	1,248.78	
Training - SANE training	156.00	
Trial Fee	1,156.00	
Gross Wages - Other	1,234.35	
Total Gross Wages		496,481.04
Health insurance		18,381.00
Payroll Tax Expense		
OR STatewide Transit Tax	0.00	
Oregon Paid Leave	506.97	
Payroll Tax Expense - Other	45,275.64	
Total Payroll Tax Expense		45,782.61
State Unemployment		5,096.02
Workers Benefit Fund		199.20
Payroll Expenses - Other		75,900.45
Total Payroll Expenses		641,840.32
Program Expenses		
Client Assistance		
Emergency Housing	1,637.48	
Housing	7,290.27	
Client Assistance - Other	11,191.79	
Total Client Assistance		20,119.54
FNE Expenses		
FNE Insurance Expense		
Malpractice Insurance	522.00	
Total FNE Insurance Expense	522.00	
SANE certification fee	769.00	
SANE Equipment	2,216.00	
SANE Supplies	3,941.54	
SANE Training - meals	58.39	
SANE training - registration	317.90	

Jackson County SART
Profit & Loss
January through December 2025

		Jan - Dec 25
Telephone		
Answering Service	1,519.40	
Total Telephone		1,519.40
FNE Expenses - Other		701.10
Total FNE Expenses		10,045.33
Prevention Expenses		
Prevention		
School program	-47,442.79	
Total Prevention		-47,442.79
Prevention Office Rent		9,000.00
Translation/Interpreta Services		300.00
Total Prevention Expenses		-38,142.79
Resource Specialist Expenses		
Osnium		1,637.94
RS Internet		549.99
RS Office Rent		6,600.00
Total Resource Specialist Expen...		8,787.93
Program Expenses - Other		40.00
Total Program Expenses		850.01
Telephone (old)		
Office Phone		150.46
Telephone (old) - Other		3,231.32
Total Telephone (old)		3,381.78
Travel		3,546.76
Total Expense		735,364.23
Net Ordinary Income		4,796.69
Other Income/Expense		
Other Income		
Rebate/coupon		234.00
Total Other Income		234.00
Net Other Income		234.00
Net Income		**5,030.69**

Jackson County SART
Balance Sheet
As of December 31, 2025

	Dec 31, 25
ASSETS	
Current Assets	
Checking/Savings	
JC SART Checking	216,296.92
Money Market (8392)	205,009.33
PayPal	1,066.74
Total Checking/Savings	422,372.99
Other Current Assets	
Undeposited Funds	4,941.00
Total Other Current Assets	4,941.00
Total Current Assets	427,313.99
Fixed Assets	
Equipment	11,402.75
Total Fixed Assets	11,402.75
Other Assets	
Accum. Depreciation	-10,045.00
Total Other Assets	-10,045.00
TOTAL ASSETS	**428,671.74**
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
Payroll Liabilities	
Federal Withholding	13.98
Garnishment	1,810.98
Oregon Withholding	-1,416.00
State Unemployment	26,206.87
Workers Benefit Fund	1,473.19
Payroll Liabilities - Other	16,797.89
Total Payroll Liabilities	44,886.91
Payroll Taxes Payable	5,239.35
Unclaimed Property Paya...	1,013.66
Total Other Current Liabilit...	51,139.92
Total Current Liabilities	51,139.92
Total Liabilities	51,139.92
Equity	
Prior Year Equity Adjustme...	4,183.13
Unrestrict (retained earnings)	368,318.00
Net Income	5,030.69
Total Equity	377,531.82
TOTAL LIABILITIES & EQUITY	**428,671.74**

City of Ashland Social Service Grant Program

Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Rogue Valley Mentoring **DATE:** 02/06/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) N/A

ADDRESS 2931 S. Pacific Hwy Medford OR 97501
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Ashland High School Referral-Based Mentoring Circles

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Services for at-risk youth

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ 10000

GRANT CONTACT (If other than Executive Director listed below)

Name _____

Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION

Name Laura Pinney

Telephone (541) 708-6688 **E-mail** laura@rvmentoring.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Anne Williams (Feb 13, 2026 12:58:27 PST)
Signature of Board President

Laura D Pinney (Feb 13, 2026 12:04:16 PST)
Signature of Executive Director/CEO

Anne Williams
Type Name

Laura Pinney
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

1. **Program/project is:** **new** ☐ **established/continuing** ☐
   pilot ☐ **If pilot, expected duration** 12 months

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*

   This program serves 23 ninth-grade students at Ashland High School. Students are referred by school counselors based on risk factors including frequent behavioral referrals, chronic absenteeism, or social-emotional challenges that impact academic success. Demographics reflect AHS student body: 21% experience poverty, 13% identify as Latino/a/x, and only 63% attend school regularly.

3. What will this funding enable?

   This $10,000 investment supports two weekly, school-day mentoring circles serving 23 at-risk ninth graders in 2026–27. Funds cover staff facilitation, clinical supervision, coordination, and essential supplies, removing cost, transportation, and stigma barriers to care and enabling referrals to RVM's 1:1 Match Program for students needing ongoing support.

4. Number of volunteers this program/project will engage: 4

   Number of paid program employees this program/project will engage: 4

5. Total number volunteer's agency utilizes: 62

   Total number of paid agency employees: 12

6. Outline key strategies of the project/program with timeline and staff structure.

   From July–August 2026, RVM will prepare for implementation through staff training, school and clinical coordination, family outreach, and baseline CASEL surveys. Two weekly school-day mentoring circles will launch in September 2026, followed by weekly 50-minute circles through June 2027 with ongoing school coordination, individual support, clinical referrals, and monthly clinical supervision. Mid-year progress review will occur in January 2027, with post-program surveys, outcomes analysis, and final reporting in June 2027. The program is staffed by a Program Director, licensed clinical supervisor, trained Lead Mentors, and trained volunteer mentors.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

   Five students have already been referred from AHS circles to RVM's 1:1 Match Program during the 2025-26 school year, demonstrating immediate need for wraparound services. This funding supports both prevention (universal circle access) and intervention (individualized mentoring for highest-need students), creating a true continuum of care within Ashland schools.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. mission statement, purpose(s) and how this program/project fits with your mission.
b. your organization's unique qualifications to accomplish your program outcomes?
c. what approach is your agency taking to serve clients and train staff on trauma informed care?

2. What:
a. issues(s) is the project/program intended to impact,
b. strategy for change your program will be based on,
c. evidence that the project/program will be successful in the proposed setting, and
d. what tool(s) will you use to measure outcomes?

3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1. a) Rogue Valley Mentoring (RVM) transforms communities by investing in young people through meaningful mentoring relationships. Since 2005, RVM has trained more than 600 volunteer mentors and served over 2,900 youth ages 9–24 across Jackson County. All services are provided at no cost and prioritize youth facing the greatest barriers to support, including BIPOC youth (predominantly Latino), youth in rural and under-resourced communities, and those impacted by poverty and trauma.

This program directly advances RVM's mission by providing consistent adult support to Ashland's most vulnerable ninth graders during a critical developmental transition. Using a referral-based, school-day model, the program serves all students in Study Skills classes. These students experience behavioral, academic, or social-emotional challenges and need more support than overstretched school counselors can provide. Through small-group mentoring circles and wraparound 1:1 matches for students requiring intensive support, RVM creates accessible pathways to the stable, caring relationships shown to protect against disengagement, mental health crises, and school failure.

b) RVM brings deep expertise in school-based youth mentoring with proven outcomes. Key strengths include:
• Culturally responsive staffing: 75% of staff identify as BIPOC and 63% are bilingual Spanish/English. Many grew up in Jackson County and attended the same schools as current participants.
• Trauma-informed clinical capacity: All staff are certified in ASIST Suicide Prevention, Youth Mental Health First Aid, and Youth Crisis Intervention. A licensed clinical social worker (LCSW) provides weekly supervision, reviews mentor reports, and coordinates care with school counselors.
• Three-tiered BEST model: Recognized by the Oregon Department of Education as an emerging best practice, our Behavioral Education Support Tiers framework provides a seamless continuum from prevention (Tier 1 circles), to targeted support (Tier 2 check-ins), to clinical referral (Tier 3). This model reduces counselor caseloads while ensuring no student falls through gaps.
• Proven school partnerships: RVM serves 300+ students weekly across three districts. At Talent Middle School, 100% of participating teachers request continued programming, citing stronger outcomes than standardized SEL curricula due to our relationship-driven, trauma-informed approach.

RECIPIENT AGENCY Rogue Valley Mentoring
PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

Continue from previous page (if needed):

c) RVM embeds trauma-informed principles across all programming, recognizing that many youth we serve have experienced adverse childhood experiences such as poverty, housing instability, family separation, or community violence. Core practices include predictable structure, safe spaces, consistent mentors, youth voice in activities, small-group peer support, strengths-based facilitation, and culturally responsive, bilingual programming. All staff complete comprehensive training on ACEs, trauma responses, de-escalation, mandatory reporting, cultural humility, and neurodiversity-affirming practices. Ongoing learning occurs through monthly staff meetings and weekly clinical supervision with our LCSW.

2 a) This program responds to three interconnected challenges facing Ashland youth:
• Youth mental health crisis: Over half of Ashland High School juniors rate their mental health as fair or poor, with widespread anxiety, depression, and school avoidance.
• Limited access to behavioral health services: Counselor-to-student ratios exceed recommended levels, and community providers face long waitlists, compounded by cost, transportation, and stigma barriers.
• Academic disengagement: Only 63% of students attend school regularly. Chronic absenteeism strongly predicts course failure, dropout, and reduced postsecondary opportunities.

b) RVM's approach is grounded in developmental relationships research and social-emotional learning theory, which show that one consistent, caring adult can significantly alter outcomes for at-risk youth. Our school-embedded, referral-based model uses the CASEL framework to build self-awareness, self-management, social awareness, relationship skills, and responsible decision-making. The program operates across three tiers, providing universal skill-building, targeted individual support, and clear pathways to clinical care when needed. This continuum normalizes help-seeking, removes access barriers, and reduces reliance on emergency services while strengthening protective factors.

c) Evidence supporting this model includes national research showing mentoring increases high school completion and improves academic and behavioral outcomes. RVM's own data reinforce these findings. At Talent Middle School, mentoring days showed higher attendance, significant reductions in classroom disruptions, measurable academic gains, and increased youth confidence and help-seeking behaviors. Schools report the first reduction in expressed suicidal ideation since 2020. During the 2024–25 Ashland High School pilot, the program successfully identified students needing higher-intensity support, referring them into RVM's 1:1 Match Program and community behavioral health services.

d) RVM uses a multi-method evaluation framework including CASEL-aligned pre/post youth surveys, structured mentor observation reports reviewed weekly, school attendance and behavioral data (with consent), youth satisfaction surveys, and standardized mental health screenings for Tier 2 students. All data are disaggregated to ensure equitable impact and guide continuous improvement.

3. Early, accessible behavioral health support benefits the entire Ashland community by preventing crisis, strengthening families, and improving school climate. Teachers report improved classroom environments, counselors gain capacity to focus on crises and postsecondary planning, and families experience reduced stress and conflict. Long-term benefits include improved graduation rates, reduced justice system involvement, and a stronger future workforce.

RVM operates as a critical bridge in Ashland's youth behavioral health continuum, working closely with Ashland School District, La Clinica, Kairos, Oregon DHS, and our own 1:1 Match Program. This integrated model expands school capacity without duplicating services, reduces strain on emergency and clinical systems, and ensures youth receive the right level of support at the right time.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2023-06/2024

   b. Administration & Fundraising expense: $ 219,504 25.48 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

   c. Program expense $ 396,607

   d. **Total expenses**: **$** 861,472

   e. Sources of **revenue**:

Memberships/ individual contributions	$45,872	6 %
Raised through fundraising activities	$	%
Government	$211,183	29.18 %
Foundations	$313,609	43.34 %
United Way	$130	%
Fees for Service	$49,948	6.9 %
Other (reimbursements, payments, bequests, etc.)	$103,015	14 %

   f. **Total revenue**: **$** 723,576

2. What is the highest level of financial reporting required by your funders?

   RVM provides quarterly financial reports to funders and maintains grant-specific fund accounting

3. Briefly describe your sustainability outlook for the project/program in the future.

   RVM's sustainability approach emphasises diversified funding and gradual expansion of long-term revenue. The program is supported through foundation grants, individual giving, with additional public funding pathways under exploration through Jackson County Mental Health. (AHS does not contribute financially to our services.)

4. a. Total organizational annual budget **current ongoing** fiscal year: $687,727

   b. Total program/project budget current ongoing fiscal year: $45,856

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, **2026,** to June 30, **2027**(*If Applicable)

RECIPIENT AGENCY Rogue Valley Mentoring

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$12,500	$
City of Ashland Funds	$	$
Jackson County Funds	$	$
CDBG (identify)	$	$
Other State or Federal Funds OHA	$40,000	$
United Way Funds	$	$
Other Funds (identify) Foundations/corporate	$687,727	$
SUB TOTALS	$687,727	$
TOTAL REVENUE (Pending & Secured)		**$687,727**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 451,458
Total Benefits		$
TOTAL PERSONNEL SERVICES		**$451,458**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Program and Event Expense		$29,070
Professional Fees and advertising		$167,528
Occupancy		$14,500
Office Expense		$16,620
Transportation		$4,550
Staff development and training		$4,000
TOTAL MATERIALS & SERVICES		**$236,268**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$0**
TOTAL EXPENDITURES (Sum of A, B & C)		**$ 687,726**

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, **2026** to June 30, **2027** **(*If Applicable)**

RECIPIENT AGENCY Rogue Valley Mentoring

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$	$
Jackson County Funds	$	$
CDBG (identify)	$	$
Other State or Federal Funds	$	$
United Way Funds	$	$
Other Funds (identify) Ashland Comm Health Fdn	$ 40,000	$
SUB TOTALS	$ 40,000	$
TOTAL REVENUE (Pending & Secured)	40,000	**$**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 36,546
Total Benefits		$
TOTAL PERSONNEL SERVICES		**$** 36,546
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Programs & Materials		$ 980
Professional Fees		$ 5,725
Occupancy		$ 1,015
Office		$ 1,055
Transportation		$ 180
Staff development & Training		$ 335
TOTAL MATERIALS & SERVICES		**$** 9,290
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$** 0
TOTAL EXPENDITURES (Sum of A, B & C)		**$** 45,836

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

I.			***# Whole Program***	***# Ashland***
	Gender			
	Age*	Female		14
		Male		1
		Other		8
II.		**Totals**		
		0 to 5		
		6 to 12		
		13 to 17		23
		18 to 30		
		31 to 40		
		41 to 50		
		51 to 61		
		62 +		
		Unknown		
		Total		

***at point of entry for service**

IV. Race/Ethnicity

	#Whole Program	***Ethnicity Hispanic/Latino****	***# Ashland***
White			19
Black/African American			
American Indian/Alaskan Native			1
Native Hawaiian/other Pacific Islander			
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial			
Other			3
Totals			23

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Rogue Valley Mentoring
PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

1. **Number of board members required in bylaws?** **Minimum** n/a **Maximum** 10
2. **Number of board members currently active?** **# Voting** 9 **Vacancies** 0
3. **Average percentage board meeting attendance (over last completed year):** 90 **%**
4. **Percent of board in attendance required for a quorum:** 90 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
Executive committee	5
Finance/Budget Committee	3
Outreach Committee	5

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	8	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial	1	
Other		
Totals	9	

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

25-26 RVM Board Roster							
Name and Position	**Contact Info**	**Professional Affiliation**	**Special Skills**	**Gender & Ethnicity**	**Board Term Start**	**Languages**	**Contribution**
Name and Position	**Contact Info**	**Professional Affiliation**	**Special Skills**	**Gender & Ethnicity**	**Board Term Start**	**Languages**	**Contribution**
Todd Iversen Board Treasurer	5824 Quicksilver Dr., McKinney, TX 75070 214-912-1921 todd@rvmentoring.org	Client Director, Ziosk Media Network	Strategic Planning, Business and Program Management, Marketing and Leadership Development	Male, Caucasian	11/1/2016		yes
Jessica Therkelsen, Esq. Board Secratary	375 Helman St., Ashland OR 97520 805-448-1398 jessica@rvmentoring.org	Nonprofit & International Humanitarian Aid Lawyer	Policies and Procedures, Risk assessments, Budget Review, Program Management	Female, Caucasian	11/12/2021		yes
Kellie England Board Vice Chair	3989 Livingston Rd., Central Point, 97502 916-462-7916 kellie@rvmentoring.org	Banker at Rogue Credit Union	Personnel/HR, Leadership/Vision, Experience with Training or Facilitation	Female, Caucasian	8/25/2022		yes
Bea Bacher-Wetmore	858 Blackberry Lane, Ashland, 97520 541-708-3835 bea@rvmentoring.org	Retired: HS Biology Teacher & Research Labs		Female, Caucasian	9/20/2023	english and spanish	yes
Anne Williams Board Chair	1044 Arrowhead Trail, Eagle Point, 97524 541-613-0772 anne@rvmentoring.org	Corporate Strategist	Finance/Accounting, Contacts with Business Leaders, Business & Euntrepreneurial Skills, Leadership/Vision	Female, Caucasian	10/12/2023		yes
Adam Bowers	384 Helman St Ashland OR 97520 (610) 392-6661 axbowers@gmail.com	PRODUCT MANAGEMENT, TECHNOLOGY STRATEGIST DATA AND ANALYTICS EXPERTISE	Adam is a volunteer 1:1 mentor and a recurring monthly donor	Male, Caucasian	01-2025		yes
Martha Kalin	331 Randy St Ashland, OR 97520 303-589-8633 marthakalin@icloud.com	Health Care Planning & Administration/Social Work	Poet, volunteer recruitment, Program Development, Strategic Planning, Previous Board Experience Youth Vision (a youth mentoring organization in Cleveland, OH) 1992-94, Menorah Park (a non-profit nursing home in Beachwood, OH) 1992-1994, Shoshoni Yoga Retreat (non-profit retreat center in Colorado) 2004-2012, ALSO going to be a 1:1 mentor	Female, Caucasian	2/1/2025	English	yes
Luke Bracerro	541-625-9643	N/A	1:1 mentee and mentor as well as part of RVMs YLAB	Male, More than one race	05/15/2025	English	

25-26 RVM Board Roster							
Name and Position	**Contact Info**	**Professional Affiliation**	**Special Skills**	**Gender & Ethnicity**	**Board Term Start**	**Languages**	**Contribution**
Shae Johns	541.973.4349, Shae.Johns@sogoodwill.org, shae@rvmentoring.org, 100 Mooreland Ter, Eagle Point OR 97524	Goodwill	holding certificates in Non-Profit Financial Management and Non-Profit Management and Leadership from Harvard, and a certificate in Diversity, Equity and Inclusion from Cornell	Female, Caucasian	10/01/2025	English	yes

IRS Department of the Treasury
Internal Revenue Service

OGDEN UT 84201-0038

In reply refer to: 0444427733
Aug. 03, 2018 LTR 147C 0
[redacted] 000000 00
00003136
BODC: TE

ROGUE VALLEY MENTORING
% LESLIE LANES
295 E MAIN ST STE 6
ASHLAND OR 97520-1848

033340

Employer identification number: [redacted]

Dear Taxpayer:

Thank you for your phone call on July 25, 2018.

Your employer identification number (EIN) is [redacted] Please keep this letter in your permanent records. Enter your name and EIN on all federal business tax returns and on related correspondence.

You can get any of the forms or publications mentioned in this letter by visiting our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, you can call us at 800-829-0115.

If you prefer, you can write to us at the address at the top of the first page of this letter.

When you write, include a copy of this letter, and provide your telephone number and the hours we can reach you in the spaces below.

Telephone number ( )_____ Hours _____

Keep a copy of this letter for your records.

Thank you for your cooperation.

0444427733
Aug. 03, 2018 LTR 147C 0
[redacted] 000000 00
00003137

ROGUE VALLEY MENTORING
% LESLIE LANES
295 E MAIN ST STE 6
ASHLAND OR 97520-1848

Sincerely yours,

Ginni L. Redfern
Program Manager, AM OPS 1

Enclosures:
Copy of this letter

Statement of Activity Comparison

Rogue Valley Mentoring

July 1, 2024-June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	JUL 1 2024 - JUN 30 2025	JUL 1 2023 - JUN 30 2024 (PY)
Income		
4100 Grants	252,495.79	313,609.00
4200 Government Contracts	138,635.00	211,132.87
4300 Contributions	35,410.60	45,871.91
4310 Donor Advised Funds	11,000.00	
4500 Fiscal Sponsorships		
4510 SOHE Fiscal Sponsor	40,658.30	40,758.96
Total for 4500 Fiscal Sponsorships	**$40,658.30**	**$40,758.96**
4600 Event Income	752.00	1,288.12
4650 Sponsorships	3,000.00	2,500.00
4700 School District Contributions	5,000.00	46,159.38
4750 Trade/In-Kind Donation Income	55,944.00	58,896.00
4800 Interest Income	2,341.90	1,785.50
4760 Building Use Rent Income		1,575.00
Total for Income	**$545,237.59**	**$723,576.74**
Cost of Goods Sold		
Gross Profit	**$545,237.59**	**$723,576.74**
Expenses		
5000 Personnel expense		
5100 Salaries	365,692.55	460,646.79
5200 Payroll taxes	31,661.33	41,989.75
5500 HRA Expense	15,000.00	17,250.00
5600 Workers Compensation	1,545.88	1,938.16
5800 Other health benefits	3,960.00	4,560.00
5900 Payroll reimbursements	-20.00	-817.06
Total for 5000 Personnel expense	**$417,839.76**	**$525,567.64**
6000 Program expense		
6120 Community outreach	817.46	452.62
6140 Meals & snacks	4,794.23	7,560.16
6150 Program materials/supplies/activities	2,672.27	4,265.25
6160 Field trips	1,118.42	274.00
6180 Training materials & promotion	181.40	802.73
6190 Mentee incentives	61.35	1,795.11
6220 Gifts & Recognition	447.20	286.21
6240 Stipends	18,031.15	11,250.13
6260 Volunteer Training & Support	634.07	4,156.92
6270 Background checks	175.00	362.50
6280 RVM Program & Staff Events	90.84	12,815.57

Statement of Activity Comparison

Rogue Valley Mentoring

July 1, 2024-June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	JUL 1 2024 - JUN 30 2025	JUL 1 2023 - JUN 30 2024 (PY)
6290 Celebration - End of Year	86.80	1,016.31
6300 Community Garden Expense		2,407.76
Total for 6000 Program expense	**$29,110.19**	**$47,445.27**
6500 Events		
6510 Publicity and promotion	298.24	423.00
6520 Printing	453.92	101.07
6525 Postage	23.96	
6530 Supplies & aesthetics	222.32	777.85
6550 Food & catering	608.71	2,000.65
6560 Outside services	150.00	1,309.50
6570 Rental equipment	1,194.96	979.97
6580 Honoraria/Stipend	975.00	915.00
6540 Facility rental		75.00
Total for 6500 Events	**$3,927.11**	**$6,582.04**
6600 Professional fees		
6610 Audit and Accounting services	16,176.75	38,372.14
6635 HR Fees	2,196.00	3,096.00
6650 Mentor support specialists	27,500.00	30,000.00
6660 In-Kind Professional Services	55,944.00	55,944.00
6665 Advertising & Marketing	13,900.00	5,020.00
6670 Fundraising services	43,650.75	43,097.78
6690 Professional fees - other	450.00	18,791.78
6620 Information Technology services (deleted)		20.00
6640 Legal services		4,095.00
6680 Content development (deleted)		5,225.00
Total for 6600 Professional fees	**$159,817.50**	**$203,661.70**
6700 Advertsing & Promotion		
6710 Advertising & promotion	1,609.54	1,843.54
6730 Gifts & Awards	323.45	634.22
Total for 6700 Advertsing & Promotion	**$1,932.99**	**$2,477.76**
6800 Occupancy		
6810 Rent	10,200.00	9,850.00
6830 Telecommunications	2,365.94	2,563.44
6840 Security	600.93	762.83
6860 Equipment (deleted)	65.00	
6870 Repairs and maintenance	517.53	1,723.37
6880 Non-payroll taxes paid	479.00	976.00
Total for 6800 Occupancy	**$14,228.40**	**$15,875.64**

Statement of Activity Comparison

Rogue Valley Mentoring

July 1, 2024-June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	JUL 1 2024 - JUN 30 2025	JUL 1 2023 - JUN 30 2024 (PY)
7000 Office		
7010 Office supplies	1,983.40	4,580.31
7050 Computer supplies	144.98	2,329.81
7100 Postage and Delivery	282.62	920.57
7150 Printing & Copying	434.52	650.75
7250 IT software and licenses	9,276.82	10,175.60
7300 Dues & subscriptions	419.25	599.60
7350 Licenses & Permits	50.00	50.00
7400 Bank/Merchant Fees	78.49	4.97
7500 Insurance	4,787.84	5,253.84
Total for 7000 Office	**$17,457.92**	**$24,565.45**
8000 Travel	$0.00	
8010 Local travel/Mileage	4,556.72	5,882.43
8030 Per Diem	0.00	
8110 Lodging	512.80	794.16
8020 Meals		356.62
8120 Airfare		1,708.72
Total for 8000 Travel	**$5,069.52**	**$8,741.93**
8200 Conferences and meetings		
8210 Meeting expense	156.87	1,165.47
8220 Conferences	800.00	3,280.15
8230 Staff development and training	4,838.00	6,550.82
8250 Board Meetings	275.06	15,058.03
Total for 8200 Conferences and meetings	**$6,069.93**	**$26,054.47**
REIMBURSEMENTS		
Cell Phone	500.00	500.00
Total for REIMBURSEMENTS	**$500.00**	**$500.00**
Total for Expenses	**$655,953.32**	**$861,471.90**
Net Operating Income	**-$110,715.73**	**-$137,895.16**
Other Income		
HRA Forfeit Revenue	0.40	6,699.03
Total for Other Income	**$0.40**	**$6,699.03**
Other Expenses		
Net Other Income	**$0.40**	**$6,699.03**
Net Income	**-$110,715.33**	**-$131,196.13**

Statement of Financial Position Comparison

Rogue Valley Mentoring

As of June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	AS OF JUNE 30, 2025	AS OF JUNE 30, 2024 (PY)
Assets		
Current Assets		
Bank Accounts		
0000 Cash on hand	0.00	
1020 RVM Checking Debit 8108	123,849.29	123,308.34
1023 RVM Ownership	6,875.78	4,700.08
1024 Shared Deposit Account 8599	9,201.00	9,604.62
1028 HRA Holding Account	$6.04	$3.63
1028.1 RVM HRA Holding Funds	19,011.61	15,119.88
1028.2 SOHE HRA Holding Funds	10,138.97	7,694.26
1028.3 HRA Forfeit	0.40	14,295.10
1028.99 HRA Holding Prepaid	0.00	6,750.00
Total for 1028 HRA Holding Account	**$29,157.02**	**$43,862.87**
RVM Money Maker 2443	92,502.56	92,350.75
Total for Bank Accounts	**$261,585.65**	**$273,826.66**
Accounts Receivable		
1100 Accounts Receivable	266.00	266.00
1150 Pledges & Grants Receivable	4,883.30	80,854.30
8901 Bank Transfers	5,000.00	5,000.00
Total for Accounts Receivable	**$10,149.30**	**$86,120.30**
Other Current Assets		
1200 Due to/from SOHealthE	39.36	12,965.35
1210 SOHE Undeposited Funds	-6,250.00	0.00
1220 Undeposited Funds	11,549.00	0.00
1800 Uncategorized Asset	0.00	0.00
2390 Payroll Refunds	0.00	0.00
Employee Draws	0.00	52.95
Total for Other Current Assets	**$5,338.36**	**$13,018.30**
Total for Current Assets	**$277,073.31**	**$372,965.26**
Fixed Assets		
Other Assets		
Total for Assets	**$277,073.31**	**$372,965.26**

Statement of Financial Position Comparison

Rogue Valley Mentoring

As of June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	AS OF JUNE 30, 2025	AS OF JUNE 30, 2024 (PY)
Liabilities and Equity		
Liabilities		
Current Liabilities		
Accounts Payable		
2100 Accounts Payable	6,304.97	15,033.50
Total for Accounts Payable	**$6,304.97**	**$15,033.50**
Credit Cards	**$769.49**	
Other Current Liabilities		
2400 Payroll Liabilities	**$1,307.88**	**$13,991.90**
2500 HRA Liability	**$29,150.58**	**$29,564.14**
Total for Other Current Liabilities	**$30,458.46**	**$43,556.04**
Total for Current Liabilities	**$37,532.92**	**$58,589.54**
Long-term Liabilities		
Total for Liabilities	**$37,532.92**	**$58,589.54**
Equity		
3950 Retained Earnings	313,375.72	444,571.85
Net Income	-110,715.33	-131,196.13
3000 Opening Balance Equity	0.00	0.00
3320 Restricted Funds	36,880.00	
3340 Temporarily Restricted Funds	0.00	1,000.00
Total for Equity	**$239,540.39**	**$314,375.72**
Total for Liabilities and Equity	**$277,073.31**	**$372,965.26**

City of Ashland Social Service Grant Program
Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Rogue Valley Council of Governments **DATE:** 01/22/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) RVCOG

ADDRESS 155 N 1st Street (Mailing: PO Box 3275) Central Point OR 97502
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Food & Friends Meals on Wheels

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Assistance to obtain and/or maintain housing.

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ $ 12,000

GRANT CONTACT (If other than Executive Director listed below)
Name Jon Pfefferle
Telephone (541) 734-9505 **E-mail** jpfefferle@rvcog.org

EXECUTIVE DIRECTOR INFORMATION
Name Ann Marie Alfrey
Telephone (541) 423-1334 **E-mail** amalfrey@rvcog.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Signature of Board President

Jody Hathaway
Type Name

Ann Marie Alfrey Digitally signed by Ann Marie Alfrey Date: 2026.01.26 10:09:07 -08'00'
Signature of Executive Director/CEO

Ann Marie Alfrey
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

1. **Program/project is:** **new** ☐ **established/continuing** ☑
   pilot ☐ **If pilot, expected duration** _____

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*

   Our program provides nutritious meals to homebound older adults 60+ living within the City of Ashland who might otherwise go hungry without the provision of our nutrition services. Our service population is considered high risk and vulnerable to malnutrition, loneliness, isolation and depression.

3. What will this funding enable?

   City of Ashland grant funds will help support the Meals on Wheels (MOW) component of our program. Food & Friends reduces feelings of food insecurity by enabling older adults to receive home delivered meals on a donation basis. By providing meals to older adults living on low, fixed incomes, we can help them avoid having to choose between paying for rent and utilities over food.

4. Number of volunteers this program/project will engage: 405

   Number of paid program employees this program/project will engage: 12.5 FTE

5. Total number volunteer's agency utilizes: 423

   Total number of paid agency employees: 42.7 FTE

6. Outline key strategies of the project/program with timeline and staff structure.

   Food & friends provides nutritious meals to eligible participants in Ashland, Mon-Fri, with frozen weekend meals available, if needed. We expect to serve approximately 12,000 home delivered meals in Ashland during FY 25-26. Meal services are accompanied with social connection, referrals to additional services, nutrition education, and an invaluable safety check, allowing older adults to remain independent in their own homes. Our homebound participants report improved nutritional health, increased safety, and decreased isolation. In-home assessments are completed with every new participant with reassessments done annually, allowing outreach staff to determine client needs and make appropriate referrals. Food & Friends program staff providing support for this project: Program Director, Home Delivery Coordinator, Office Specialist, Meal Site Coordinator, and program volunteers.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

   Our MOW program has 4 delivery routes in Ashland that serve eligible homebound older adults who are unable to prepare meals due to illness, injury or disability and are at increased risk of malnutrition, isolation, loneliness and depression. In addition to hand delivering every meal, our volunteers are a vital safety net between participants and other services. Volunteers report health/safety concerns to our office so assistance calls to family members or emergency services can be made, as appropriate. We also provide social dining opportunities at our 6 dining locations throughout Jackson County, including one site in Ashland. Local support is critical as it helps us leverage other funding and meet Federal match requirements.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. **mission statement, purpose(s) and how this program/project fits with your mission.**
b. **your organization's unique qualifications to accomplish your program outcomes?**
c. **what approach is your agency taking to serve clients and train staff on trauma informed care?**

2. **What:**
   a. **issues(s) is the project/program intended to impact,**
   b. **strategy for change your program will be based on,**
   c. **evidence that the project/program will be successful in the proposed setting, and**
   d. **what tool(s) will you use to measure outcomes?**

3. **How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)**

1a. Mission Statement: Together, we strive to cultivate an equitable approach to improving the health, wellbeing and independence of older adults and adults with disabilities through nutrition services, meaningful social connections, and opportunities for education.
Food & Friends is key in efforts towards keeping older adults living safely and with dignity in their own homes. Often the meals, social contact, and vital safety check are all that stands between an older adult and the need for costly institutional care.

1b. RVCOG is the federally designated Area Agency on Aging (AAA) and administrator of long-term care services for older adults and adults with disabilities in Jackson and Josephine Counties. Since 2001, Food & Friends remains the only MOW program delivering meals with an accompanying safety check directly to homebound older adults in the region.

1c. RVCOG's AAA has adopted programs and integrated trauma-informed supports in our departments, both in direct services and structure. The AAA developed and set in motion a Service Equity Plan to address needs for advancement in service delivery and create policies and strategies to improve outcomes with program participants and staff. SAGECare training was introduced to staff in 2023 to improve cultural competency to better serve LGBTQ+ older adults in our communities. SAGECare training continues on a bi-annual basis to keep staff up to date on current information.

2a. Issues: Food insecurity, malnutrition, isolation, loneliness, and depression in older adults dramatically impacts their physical and mental health. Safety issues in the home can add to the stress our participants experience. With our services, many are able to avoid/minimize costly hospitalization or institutional care, reducing federal tax dollars spent on care. Ensuring the provision of meals, socialization, and safety is often all it takes to afford older adults the ability to remain healthy and independent in their own homes.

2b. We promote the ability for older adults and adults with disabilities to live independently in their community by providing nutritionally balanced meals, social interactions to lessen the effects of isolation and loneliness, essential safety net checks and connections to additional services. Meal sites are available to those older adults who are able to attend, providing lunch in a socially interactive environment. Food & Friends operates the dining room in the Ashland Senior Center, and it is a hub for our MOW operation in Ashland.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)
PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

Continue from previous page (if needed):

2c. Good nutrition is basic to health and wellbeing. However, our program's daily interaction with hundreds of older adults illustrates that many are unable to provide this fundamental necessity alone. In FY24-25 we served 276,071 meals to both congregate and home delivery participants throughout Jackson and Josephine Counties. During the same period, we served 18,873 meals to our Ashland participants. Results from our 2025 annual survey of MOW participants indicates the following: 91% reported feeling less isolated due to the volunteers' visits; 93% felt safer knowing a volunteer would deliver to their home; 89% reported improved nutritional health; 85% reported that participating in the program improved their quality of life; 87% reported that participating in the program allowed them to remain independent; and 56% reported that our volunteers are often the only people they see in a given day.

2d. The number of meals/individuals served comes from database reports. We conduct annual surveys on participant satisfaction, improved nutritional health, decreases in isolation, and increases in overall safety. We provided pertinent health, safety and nutrition education articles, referrals to additional services and maintain a list of resources on our website in both English and Spanish.

3. In addition to supporting the ability for older adults to remain independent in their own homes, our program is more cost effective for the community when older adults can avoid institutional settings. In Oregon, the average cost of one day in the hospital is $4,003 and a day in a nursing home is $520. The average cost of a single Food & Friends home delivered meal was $11.01 during FY 24-25. Too many of our aging neighbors suffer from poor nutrition, mobility loss and feelings of isolation. The effects of loneliness caused by isolation harm both individual health and the health of our communities. Our services increase positive physical and mental health outcomes in the older adults we serve while providing hundreds of volunteer opportunities for individuals (55 volunteers in Ashland donated 3,583 hours during FY24-25), both of which contribute to the overall wellbeing of our communities. We have strong partnerships and collaborations with the Ashland Senior Center, ACCESS, Senior Services Office, Aging & People with Disabilities and Disability Services Office case management services, Adult Protective Services, hospitals, clinics, service organizations, retailers, and churches. Together with your support, we can create positive impacts that benefit the health and wellbeing of older adults and adults with disabilities while building connected communities.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2024 - 06/2025

   b. Administration & Fundraising expense: $ 434,690 14.0 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

   c. Program expense $ 2,670,241

   d. **Total expenses**: $ 3,104,931

   e. Sources of **revenue**:

Memberships/ individual contributions	$ 196,827	6.3 %
Raised through fundraising activities	$ 2,200	0.1 %
Government	$ 1,876,339	60.4 %
Foundations	$ 6,806	0.2 %
United Way	$ 11,967	0.4 %
Fees for Service	$ 1,007,263	32.4 %
Other (reimbursements, payments, bequests, etc.)	$ 2,664	0.1 %

   f. **Total revenue**: $ 3,104,066

2. What is the highest level of financial reporting required by your funders?
   Federally mandated Single Audit as required by Title 2 US Code of Federal Regulations Part 200.

3. Briefly describe your sustainability outlook for the project/program in the future.
   We raise funds a year in advance to prevent crises from putting immediate hardship on our participants. The majority of our budgeted funding is Federal. Years of successful direct-mail fundraising has resulted in many dedicated donors and our ability to maintain an emergency fund. We rely on the emergency fund to help close the funding gap in lean years. Our program saves millions of dollars each year by utilizing a large volunteer base to deliver meals to our participants.

4. a. Total organizational annual budget **current ongoing** fiscal year: 10,883,751

   b. Total program/project budget current ongoing fiscal year: 3,279,792

ORGANIZATION BUDGET 2025-26

PROJECT PERIOD July 1, **2025,** to June 30, **2026**

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$ 10,000	$ 60,623
City of Ashland Funds	$ 12,000	$ 15,810
Jackson County Funds	$ 0	$ 48,064
CDBG (identify)	$ 0	$ 0
Other State or Federal Funds	$ 0	$ 5,348,159
United Way Funds	$ 0	$ 10,000
Other Funds (identify) Charges for Services, Donations, Internal Revenues	$ 0	$ 5,379,096
SUB TOTALS	$ 22,000	$ 10,861,752
TOTAL REVENUE (Pending & Secured)		**$ 10,883,752**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 2,823,558
Total Benefits		$ 2,193,966
TOTAL PERSONNEL SERVICES		**$ 5,017,524**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Materials & Supplies		$ 402,887
Purchased Services		$ 3,175,465
Indirect Charges		$ 473,488
Internal Services		$ 1,118,566
Operating Contingency (MPO's)		$ 513,076
Depreciation & Other Expenses		$ 142,746
TOTAL MATERIALS & SERVICES		**$ 5,826,228**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify: Vehicle Replacement		$ 40,000
TOTAL CAPITAL OUTLAY		**$ 40,000**
TOTAL EXPENDITURES (Sum of A, B & C)		**$ 10,883,752**

PROGRAM BUDGET 2025-26

PROJECT PERIOD July 1, **2025** to June 30, **2026**

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$10,000	$0
City of Ashland Funds	$12,000	$0
Jackson County Funds	$0	$30,000
CDBG (identify)	$0	$0
Other State or Federal Funds	$0	$1,304,757
United Way Funds	$0	$10,000
Other Funds (identify) Charges for Services, Donations	$0	$1,913,034
SUB TOTALS	$22,000	$3,257,791
TOTAL REVENUE (Pending & Secured)		**$3,279,791**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$530,211
Total Benefits		$437,679
TOTAL PERSONNEL SERVICES		**$967,890**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Indirect & Interfund		$369,484
Materials & Services		$6,802
Meals		$1,508,250
Kitchen Lease, Site Rents, Utilities		$116,627
Mileage & Vehicles		$90,800
Miscellaneous Expenses		$179,938
TOTAL MATERIALS & SERVICES		**$2,271,901**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify: Vehicle replacement		$40,000
TOTAL CAPITAL OUTLAY		**$40,000**
TOTAL EXPENDITURES (Sum of A, B & C)		**$3,279,791**

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

I.

		# Whole Program	*# Ashland*
Gender			
Age*	Female	1189	69
	Male	898	53
	Other	369	6
II.	**Totals**	2,456	193
	0 to 5	0	0
	6 to 12	0	0
	13 to 17	0	0
	18 to 30	2	0
	31 to 40	10	0
	41 to 50	31	0
	51 to 61	94	4
	62 +	2014	189
	Unknown	305	0
	Total	2,456	193

*at point of entry for service

IV. Race/Ethnicity

	#Whole Program	*Ethnicity Hispanic/Latino**	*# Ashland*
White	1,498		96
Black/African American	14		2
American Indian/Alaskan Native	53		4
Native Hawaiian/other Pacific Islander	15		2
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial			
Other	876	46	89
Totals	2,456	46	193

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)
PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

1. **Number of board members required in bylaws?** **Minimum** 24 **Maximum** 24
2. **Number of board members currently active?** **# Voting** 23 **Vacancies** 1
3. **Average percentage board meeting attendance (over last completed year):** 55 **%**
4. **Percent of board in attendance required for a quorum:** 51 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
RVCOG Board of Directors	24
Executive Committee of RVCOG Board	6
Senior Advisory Council	9

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	Unknown	Unknown
Black/African American	Unknown	Unknown
American Indian/Alaskan Native	Unknown	Unknown
Native Hawaiian/other Pacific Islander	Unknown	Unknown
American Indian/Alaskan Native and White	Unknown	Unknown
Black/African American and White	Unknown	Unknown
American Indian/Alaskan Native and Black/African American	Unknown	Unknown
Other Multi Racial	Unknown	Unknown
Other	Unknown	Unknown
Totals	Unknown	Unknown

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

RVCOG does not collect data on the character statistics of the board members. The board members are assigned by the 24 member agencies, all of which are public entities with elected or appointed board members.

2026 RVCOG Board of Directors

Jurisdiction	Primary Rep	Year Appointed	Email Contact
Ashland	Eric Hansen	2025	eric@council.ashland.or.us
Butte Falls	Mike Smeltz	2025	smeltzmichael@yahoo.com
Cave Junction	Jesse Dugas	2025	jesse.dugas@cavejunctionoregon.us
Central Point	Kelley Johnson	2021	kelley.johnson@centralpointoregon.gov
Eagle Point	Kathy Sell	2023	kathysell@cityofeaglepoint.org
ECSO	Jody Hathaway	2013	Jody.Hathaway@ecso911.com
Gold Hill	Ronald Palmer	2024	ronald.palmer@cityofgoldhill.com
Grants Pass	Victoria Marshall	2025	vmarshall@grantspassoregon.gov
Jackson County	Rick Dyer	2026	dyerr@jacksoncounty.org
Jacksonville	Andrea Thompson	2023	councilorthompson@jacksonvilleor.us
JCFD 3	Mike Hussey	2023	mikeh@jcfd3.com
JCLD	Marta Tarantsey	2024	mtarantsey@jcls.org
Josephine County	Vacant		
JSWCD	Trevor Morris	2025	trevor.morris@jswcd.org
Medford	Zac Smith	2025	council@medfordoregon.gov
Phoenix	Al Muelhoefer	2025	al.muelhoefer@phoenixoregon.gov
RCC	Jonathan Bilden	2025	JBilden@roguecc.edu
Rogue River	Pam VanArsdale	2023	mayor@cityofrogueriver.org
RVSS	John Quinn	2023	jquinn@siskiyouda.org
RVTD	Bill Mansfield	2008	541-779-2521
Shady Cove	Lena Richardson	2025	billena70@gmail.com
SOREDI	Blair Sundell	2025	blair@soredi.org
SOU	Marc Overbeck	2024	overbeckm@sou.edu
Talent	Darby Ayers-Flood	2017	mayor@cityoftalent.org

IRS Department of the Treasury
Internal Revenue Service
P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248230137
June 07, 2011 LTR 4076C EO
[redacted] 000000 00
00016815
BODC: TE

ROGUE VALLEY COUNCIL OF GOVERNMENTS
PO BOX 3275
CENTRAL POINT OR 97502-0011

58622

Federal Identification Number: [redacted]
Person to Contact: Ms. Edwards
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This responds to your request for information about your federal tax status. Our records do not specify your federal tax status. However, the following general information about the tax treatment of state and local governments and affiliated organizations may be of interest to you.

GOVERNMENTAL UNITS
Governmental units, such as States and their political subdivisions, are not generally subject to federal income tax. Political subdivisions of a State are entities with one or more of the sovereign powers of the State such as the power to tax. Typically they include counties or municipalities and their agencies or departments. Charitable contributions to governmental units are tax-deductible under section 170(c)(1) of the Internal Revenue Code if made for a public purpose.

ENTITIES MEETING THE REQUIREMENTS OF SECTION 115(1)
An entity that is not a governmental unit but that performs an essential government function may not be subject to federal income tax, pursuant to Code section 115(1). The income of such entities is excluded from the definition of gross income as long as the income (1) is derived from a public utility or the exercise of an essential government function, and (2) accrues to a State, a political subdivision of a State, or the District of Columbia. Contributions made to entities whose income is excluded income under section 115 may not be tax deductible to contributors.

TAX-EXEMPT CHARITABLE ORGANIZATIONS
An organization affiliated with a State, county, or municipal government may qualify for exemption from federal income tax under section 501(c)(3) of the Code, if (1) it is not an integral part of the government, and (2) it does not have governmental powers inconsistent with exemption (such as the power to tax or to exercise enforcement or regulatory powers). Note that entities may meet the requirements of both sections 501(c)(3) and 115 under certain circumstances. See Revenue Procedure 2003-12, 2003-1 C.B. 316.

0248230137
June 07, 2011 LTR 4076C E0
[redacted] 000000 00
00016816

ROGUE VALLEY COUNCIL OF GOVERNMENTS
PO BOX 3275
CENTRAL POINT OR 97502-0011

Most entities must file a Form 1023, Application for Recognition of Exemption Under Section 501(c))(3) of the Internal Revenue Code, to request a determination that the organization is exempt from federal income tax under 501(c)(3) of the Code and that charitable contributions are tax deductible to contributors under section 170(c)(2). In addition, private foundations and other persons sometimes want assurance that their grants or contributions are made to a governmental unit or a public charity. Generally, grantors and contributors may rely on the status of governmental units based on State or local law. Form 1023 and Publication 4220, Applying for 501(c)(3) Tax-Exempt Status, are available online at www.irs.gov/eo.

We hope this general information will be of assistance to you. This letter, however, does not determine that you have any particular tax status. If you are unsure of your status as a governmental unit or state institution whose income is excluded under section 115(1) you may seek a private letter ruling by following the procedures specified in Revenue Procedure 2007-1, 2007-1 I.R.B. 1 (updated annually).

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

S. A. Martin, Operations Manager
Accounts Management Operations

ISLER Medford LLC

Certified Public Accountants
And Business Advisors

February 27, 2018

To Rogue Valley Council of Government Donors:

Rogue Valley Council of Governments (RVCOG) is established pursuant to Oregon Revised Statutes 190.003 through 190.110. Oregon Revised Statutes (ORS) 190.010 provides that units of local government may enter into an intergovernmental agreement with other units of local government for the performance of any function or activity authorized to be performed by the parties of the agreement. Also ORS 190.007 states that for furthering economy and efficiency in local government, intergovernmental cooperation is declared a matter of statewide concern.

In our opinion, RVCOG is an instrumentality of political subdivisions of the State of Oregon. Therefore, contributions to RVCOG, made for exclusively public purposes, are deductible under section 170(c)(1) as charitable contributions "for the use of" political subdivisions.

You should consult with appropriate tax counsel regarding any limitations which may apply.

Sincerely,

Carolyn M Ryder, CPA, CGMA

Carolyn M. Ryder, CPA, CGMA
Isler Medford, LLC

CMR

839 ALDER CREEK DRIVE ● MEDFORD, OREGON 97504 ● PHONE (541) 779-7641 ● FAX (541) 773-8001
Member of Isler Association of Accounting Firms

ISLER Medford LLC

Certified Public Accountants
And Business Advisors

Independent Auditors' Report Required by Oregon State Regulations

We have audited the basic financial statements of Rogue Valley Council of Governments as of and for the year ended June 30, 2025, and have issued our report thereon dated December 19, 2025. We conducted our audit in accordance with auditing standards generally accepted in the United States of America.

Compliance

As part of obtaining reasonable assurance about whether Rogue Valley Council of Governments' financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion.

We performed procedures to the extent we considered necessary to address the required comments and disclosures which included, but were not limited to the following:

- Deposits of public funds with financial institutions (ORS Chapter 295).
- Indebtedness limitations, restrictions, and repayment.
- Budgets legally required (ORS Chapter 294).
- Insurance and fidelity bonds in force or required by law.
- Programs funded from outside sources.
- Authorized investment of surplus funds (ORS Chapter 294).
- Public contracts and purchasing (ORS Chapters 279A, 279B, 279C).

In connection with our testing nothing came to our attention that caused us to believe Rogue Valley Council of Governments was not in substantial compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations.

OAR 162-10-0230 Internal Control

In planning and performing our audit, we considered Rogue Valley Council of Governments' internal control over financial reporting as a basis for designing our auditing procedures for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Council's internal control over financial reporting. Accordingly, we do not express an opinion on the effectiveness of the Council's internal control over financial reporting.

This report is intended solely for the information and use of council members, management, and the Oregon Secretary of State and is not intended to be and should not be used by anyone other than these parties.

Isler Medford, LLC

Isler Medford, LLC
December 19, 2025

839 ALDER CREEK DRIVE ● MEDFORD, OREGON 97504 ● PHONE (541) 779-7641 ● FAX (541) 773-8001
Member of Isler Association of Accounting Firms

ROGUE VALLEY COUNCIL OF GOVERNMENTS
AUDIT COMMENTS AND DISCLOSURES
June 30, 2025

I. Internal Control

See Independent Auditors' Report on internal control structure related matters noted in a financial statement audit conducted in accordance with *Government Auditing Standards.*

II. Accounting Records

We found the accounting records of Rogue Valley Council of Governments to be adequate for audit.

III. Collateral

Based on the results of our tests, balances on deposit with financial institutions were secured in accordance with the requirements of ORS 295.

IV. Indebtedness

Rogue Valley Council of Governments complied with legal or contractual provisions relating to short-term and long-term debt.

V. Budget Compliance

We reviewed the preparation, adoption, and execution of the budget for the year ended June 30, 2025 and the preparation and adoption of the budget for the year ending June 30, 2026. Rogue Valley Council of Governments has complied with statutory requirement for the current and ensuing year's budget.

Resolutions authorizing appropriations for each fund sets the level by which expenditures cannot legally exceed appropriations. The legal level of budgetary control is the fund level for all funds except the Special Revenue Fund, which is budgeted at the department level. Budgeted amounts are as originally adopted or as amended by the Board of Directors. Expenditures did not exceed appropriations for the year ended June 30, 2025.

VI. Insurance and Fidelity Bond Coverage

We examined Rogue Valley Council of Governments' insurance policies and determined that such policies appeared to be in force at June 30, 2025. We are not competent by training to comment on the adequacy of the insurance policies covering Rogue Valley Council of Governments' property at June 30, 2025.

ROGUE VALLEY COUNCIL OF GOVERNMENTS
AUDIT COMMENTS AND DISCLOSURES

June 30, 2025

VIII. Programs Funded from Outside Sources

See Independent Auditors' Report on compliance based on an audit of basic financial statements performed in accordance with *Government Auditing Standards*.

IX. Investments

Based on our review of Rogue Valley Council of Governments' records, it appears Rogue Valley Council of Governments was in compliance with the legal requirements of ORS Chapter 294 pertaining to the investment of public funds as of June 30, 2025, and for the year then ended.

X. Public Contracts and Purchasing

Rogue Valley Council of Governments' procedures for awarding public contracts were reviewed and appear to comply with the legal requirements contained in ORS Chapter 279.

RVCOG
Rogue Valley
Council of Governments

City of Ashland Social Service Grant Program

Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Southern Oregon Jobs with Justice **DATE:** 2/10/2026

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 258 A Street #1-220 Ashland Oregon 97520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Ashland Community Peace Meal

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Hunger and Homelessness

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ 7000
GRANT CONTACT (If other than Executive Director listed below)
Name _____
Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION
Name Jason Houk
Telephone 541-841-8341 **E-mail** jason@sojwj.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

_____ _____
Signature of Board President Signature of Executive Director/CEO

Vanessa Houk Jason Houk
Type Name Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Southern Oregon Jobs with Justice

PROGRAM/PROJECT TITLE Ashland Community Peace Meal

1. **Program/project is:** **new** ☐ **established/continuing** ☑
   pilot ☐ **If pilot, expected duration** _____

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*
   Our service primarily supports the homeless, housing and food insecure communities in Ashland and surrounding areas.

3. What will this funding enable?
   Funding will support our current and moderate expansion of community meal programs and direct outreach services. We will be creating more space for community partners to provide education, harm reduction and service navigation. Furthermore, we wish to implement more tracking of services and clients to better coordinate between service providers and navigators. Funding will also support the facilitation of training for volunteers in trauma and violence informed care, de-escalation and conflict resolution and development of best practices for reaching and serving

4. Number of volunteers this program/project will engage: _____
   Number of paid program employees this program/project will engage: 0-2

5. Total number volunteer's agency utilizes: _____
   Total number of paid agency employees: 1

6. Outline key strategies of the project/program with timeline and staff structure.
   We have a very good working team of volunteers who manage and sustain our weekly meal distributions. We will be paying one dedicated person part-time to help manage our volunteers and to facilitate donations, etc. We have a leadership training program that we encourage volunteers to take to give them the skills to run meetings, fundraising and volunteer recruitment. We have a new distribution day for clothing and gear that we will be organizing in March. We are connecting with a community church this month to bring the Wednesday community meals indoors for the summer.
   We have major training and community outreach event planned to April and May. Our goal is to organize all community meals in under a collaboration. We are working with the Ashland Lions to help create the foundation for this hunger management team.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Southern Oregon Jobs with Justice

PROGRAM/PROJECT TITLE Ashland Community Peace Meal

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. mission statement, purpose(s) and how this program/project fits with your mission.
b. your organization's unique qualifications to accomplish your program outcomes?
c. what approach is your agency taking to serve clients and train staff on trauma informed care?

2. What:
a. issues(s) is the project/program intended to impact,
b. strategy for change your program will be based on,
c. evidence that the project/program will be successful in the proposed setting, and
d. what tool(s) will you use to measure outcomes?

3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1a) Southern Oregon Jobs with Justice (SOJWJ) is a coalition of community, labor, student, and faith-based groups and individuals working to improve our community standard of living and to build transformative power for social, racial, and economic justice in our community. Our direct aid programs all began with requests from our membership to meet the need.

1b) SOJwJ has a solid, long term history of helping to provide needed services in our community. Our organization was founded in 2008 and in 2015 we started the Peace Meal program. Peace Meals actually began in the Ashland Municipal Courtroom after we saw evidence of food insecurity in town that was leading to some folks feeling like they had no other resort than to steal food to feed themselves and their families. We believe that access to basic needs are fundamental human rights, and that nobody should go hungry.

We also have a decade-long history of organizing the annual Peace Meal Community Thanksgiving Feast as well as a holiday giveaway and meal just before Christmas every December. These events draw hundreds of people who live in Ashland. Our beloved holiday celebrations ensure that there's a place at the table for everyone.

1c) Our organization is run by people who have been severely impacted by numerous forms of trauma, and we bring life experience to the forefront of how we interact with our community. The first thing that we do is we build trust with our guests, and we are very protective of their unique needs. Several times each year we offer training on deescalation that is open to the public as well as our volunteers and our unhoused neighbors. Throughout the year, we mirror ways to create safe spaces where our neighbors can feel a sense of security. One thing we ' ve learned is how important it is to be consistent. We are committed to providing meals on Thursdays, Fridays and Sunday mornings as long as there is a need.

We utilize people within the houseless community to help us lead. Over the years we have had staff members who are unhoused. For us it's very important to ensure that our community has a voice within our organization.

We often take online training on trauma informed care, and we share what we've learned with our volunteers. Vanessa Houk, our chair, is certified in Mental Health First Aid training.

RECIPIENT AGENCY Southern Oregon Jobs with Justice
PROGRAM/PROJECT TITLE Ashland Peace Meal

Continue from previous page (if needed):

2a) HUNGER: While it looks like we are feeding our hungry neighbors, a lot more is actually taking place. We distribute emergency weather gear, blankets, sleeping bags, warm clothing, toiletries, snacks, and much more. At the same time, the Peace Meal is a place where people can find some calmness. We take time to build friendships and we care about our friends there. Every week we offer 140+ warm, nutritious, delicious meals. We bring food to the "dusk to dawn" lawn behind the police station, as well as to the OHRA shelter when we have leftovers to share.

LONELINESS: The US is experiencing an epidemic of loneliness and isolation. Peace Meals bring all these people together and there's this din of conversation that fills the room like the best music you've ever heard. We've heard back from guests that the acceptance and love that they've found at Peace Meals has kept them safe from self harm. For all of us it provides something to look forward to each week. Every week we have these family reunions whether we are inside Pioneer Hall, outside in Lithia Park, or downstairs in the public library. We create a sense of home together, wherever we land.

VOLUNTEER OPPORTUNITIES; One of the most powerful pieces of the Peace Meal is found on the "volunteer side" of the table. Often we have folks who are struggling with addiction and part of their recovery program is being of service to others. We have volunteers who have lived through incredibly traumatic life events (losing a spouse to murder, losing a partner to a fatal train accident, living through being a victim of sex trafficking, are just a few examples), and what we've seen is that healing happens on both sides of the table. It's an incredible thing to witness how much personal growth is rooted in the simple value of "we need to take better care of each other".

2b) Our strategy for change is to empower- the people we serve to be part of the solution. We encourage our guests to step up into volunteer and take leaedership positions.

2c) We have numerous examples of how much the Peace Meals are needed in our community and how we are successful at what we do. Here's a few: They came to us hungry, and now they are housed.
A family of 4, (mom, and 3 young children) were living outside on the Greenway. Through extensive networking, and from pulling many different agencies in, this family is currently housed. It was the relationship building that we were able to do with them that helped them finally land in an apartment. The kids still regularly come to the Peace Meal and check in with us often.
Senior support -Many of our guests are seniors and are living on a fixed income. They are able to get a hot meal and take leftovers home for the next day. They tell us how important this is to them.
Hunger lives in the moment. Having meals that are consistent and where someone can get enough food to sate hunger solves an immediate problem. We've seen how they are then able to begin working on other issues from there.

2 d) We measure outcomes from listening to what our unhoused and low income community wants and needs, and what we can do to better fit those needs. Our programs continue to grow, which is a measure of success. Our volunteer pool continues to draw in new volunteers, which is a measure of success. Our private financial donors continue to invest in our programs, because they see that it's working.

3) Our community partners include the Street Nurses from OHSU Nursing program, SART (Jackson County Sexual Assault Response Team) volunteers, Ashland Lions' s Club, Max' s Mission, ACCESS and others. Many of those groups table at the meals so they can be seen by our unhoused friends as allies, and it makes it easier for our community to access needed services. Everything from harm reduction supplies, Trauma support, medical evaluations, access to glasses and hearing aids, can be found at the Peace Meals on a weekly basis.
We have seen how much access to food can help people in crisis. Its Maslo - s Hierarchy – that once we can get basic needs met, we're able to help our neighbors succeed.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Southern Oregon Jobs with Jusice

PROGRAM/PROJECT TITLE Community Peace Meal

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): Jan 2024 - Dec 2024

   b. Administration & Fundraising expense: $ 5,800 7.7 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

   c. Program expense $ 60,932

   d. **Total expenses**: **$** 74,915

   e. Sources of **revenue**:

Memberships/ individual contributions	$ 7,010	10 %
Raised through fundraising activities	$ 29,061	41 %
Government	$ 2,003	4 %
Foundations	$ 31,810	45 %
United Way	$	%
Fees for Service	$	%
Other (reimbursements, payments, bequests, etc.)	$	%

   f. **Total revenue**: **$** 70,524

2. What is the highest level of financial reporting required by your funders?
   Annual Report

3. Briefly describe your sustainability outlook for the project/program in the future.
   We have a strong support for our operation costs though the contributions of members and member organizations. Programs require us to fundraising and we have a very strong and active volunteer pool who are willing to step up to make things happen. We will continue our campaigns for funding our projects through grants and dedicated donations.

4. a. Total organizational annual budget **current ongoing** fiscal year: 75,000

   b. Total program/project budget current ongoing fiscal year: 62,000

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, **2026,** to June 30, **2027**(*If Applicable)

RECIPIENT AGENCY Southern Oregon Jobs with Justice

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$ 7,000	$
Jackson County Funds	$ 10,000	$
CDBG (identify)	$	$
Other State or Federal Funds	$	$
United Way Funds	$	$
Other Funds (identify) Courage Award and pending grants	$ 45,000	$ 30,000
SUB TOTALS	$ 62,000	$ 30,000
TOTAL REVENUE (Pending & Secured)		**$ 92,000**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 28,800
Total Benefits		$
TOTAL PERSONNEL SERVICES		**$ 28,800**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
General Expenses		$ 12,000
Program Expenses:Peace Meal / Direct Aid and Emergency Weather Support		$ 39,000
Education / Training and Workshops - includes Holiday Parties		$ 4,000
Organization building and recruitment, leadership training and national travel		$ 3,000
		$
		$
TOTAL MATERIALS & SERVICES		**$ 58,000**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment - Mobile Kitchen operation and maintenaince		$ 4,000
Furnishings clothing Closet Support		$ 1,200
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$ 5,200**
TOTAL EXPENDITURES (Sum of A, B & C)		**$**

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, **2026** to June 30, **2027 (*If Applicable)**

RECIPIENT AGENCY Southern Oregon Jobs with Justice

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$ 7,000	$
Jackson County Funds	$ 10,000	$
CDBG (identify)	$	$
Other State or Federal Funds	$	$
United Way Funds	$	$
Other Funds (identify) Grants and Dedicated Donations	$	$ 30,000
SUB TOTALS	$	$
TOTAL REVENUE (Pending & Secured)		**$**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 14,400
Total Benefits		$
TOTAL PERSONNEL SERVICES		**$ 14,400**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Program Expenses: Food and Supplies for daily community meals		$ 24,000
Program Expenses: Gear and Direct Aid including housing assistance		$ 11,000
Program Expenses: Emergency Weather Shelter Support		$ 5,000
		$
		$
		$
TOTAL MATERIALS & SERVICES		**$ 40,000**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment mobile kitchen operation and maintenance		$ 4,000
Furnishings Clothing Closet Support		$ 1,200
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$ 5,200**
TOTAL EXPENDITURES (Sum of A, B & C)		**$**

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Southern Oregon Jobs with Justice

PROGRAM/PROJECT TITLE Ashland Community Peace Meal

I.

II.

		# Whole Program	*# Ashland*
Gender			
Age*	Female	200	200
	Male	500	500
	Other	700	700
	Totals		
	0 to 5	10	10
	6 to 12	10	10
	13 to 17	10	10
	18 to 30	80	80
	31 to 40	150	150
	41 to 50	125	125
	51 to 61	100	100
	62 +	50	50
	Unknown	165	165
	Total	700	700

***at point of entry for service**

IV. Race/Ethnicity

	#Whole Program	*Ethnicity Hispanic/Latino**	*# Ashland*
White	450	50	450
Black/African American	50		50
American Indian/Alaskan Native	25		25
Native Hawaiian/other Pacific Islander	25		25
American Indian/Alaskan Native and White	0		0
Black/African American and White American	0		0
Indian/Alaskan Native and Black/African American	0		0
Other Multi Racial	75		75
Other	125		125
Totals	700	50	700

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Southern Oregon Jobs with Justice

PROGRAM/PROJECT TITLE Ashland Community Peace Meal

1. **Number of board members required in bylaws?** **Minimum** 5 **Maximum** 9
2. **Number of board members currently active?** **# Voting** 7 **Vacancies** 2
3. **Average percentage board meeting attendance (over last completed year):** 60 **%**
4. **Percent of board in attendance required for a quorum:** 51 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
2200 Advisory Committee	1

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	6	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other	1	
Totals	7	0

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

City of Ashland Social Service Grant Program
Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: United Way of Jackson County, Inc. **DATE:** 02/09/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 60 Hawthorne Street, Medford, OR 97504
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Hope Chest

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? All five

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ $ 20,000
GRANT CONTACT (If other than Executive Director listed below)
Name Bethany Raya
Telephone (541) 773-5339 **E-mail** bethany@unitedwayofjacksoncounty.org

EXECUTIVE DIRECTOR INFORMATION
Name Dee Anne Everson
Telephone (541) 773-5339 **E-mail** deeanne@unitedwayofjacksoncounty.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Cathy Noah
Signature of Board President

Signature of Executive Director/CEO

Cathy Noah
Type Name

Dee Anne Everson
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY United Way of Jackson County

PROGRAM/PROJECT TITLE Hope Chest

1. **Program/project is:** **new** ☐ **established/continuing** ☑
   pilot ☐ **If pilot, expected duration** _____

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*
   Ashland, Oregon residents. We do not have parameters around who can access our services, provided the resident is referred to us via a case worker or social worker.

3. What will this funding enable?
   Hope Chest provided support to 481 households in fiscal year 2025. The funding we are seeking will allow us to strengthen and broaden these essential services, ensuring that more residents receive timely and effective assistance. This investment will directly enhance the quality of life for vulnerable individuals and families, helping them move toward financial stability and improved well-being.

4. Number of volunteers this program/project will engage: 0
   Number of paid program employees this program/project will engage: 3

5. Total number volunteer's agency utilizes: 1500
   Total number of paid agency employees: 7

6. Outline key strategies of the project/program with timeline and staff structure.
   Hope Chest works to address the financial challenges so many in our community face by providing low-to-no-barrier emergency funding up to $500. These funds are made payable to the vendor, such as the utility company, cell phone provider, landlord, etc. Community members are referred to us via their case worker, social worker, or similar professional. Since 2008, we've helped alleviate the toxic stress many individuals face, empowering them to retain employment, secure housing, access medical care, and cover other essential expenses. Once a referral is submitted funds are generally issued with 24-48 business hours and are facilitated by one staff person.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY United Way of Jackson County

PROGRAM/PROJECT TITLE Hope Chest

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. **mission statement, purpose(s) and how this program/project fits with your mission.**
b. **your organization's unique qualifications to accomplish your program outcomes?**
c. **what approach is your agency taking to serve clients and train staff on trauma informed care?**

2. **What:**
   a. **issues(s) is the project/program intended to impact,**
   b. **strategy for change your program will be based on,**
   c. **evidence that the project/program will be successful in the proposed setting, and**
   d. **what tool(s) will you use to measure outcomes?**

3. **How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)**

1a. United Way of Jackson County's mission is mobilizing caring to affect change, and our vision is creating positive community change. We focus on the building blocks of a good life: youth opportunity, financial mobility, healthy community, and community resiliency. Guided by our core vales of community, compassion, empowerment, vision, integrity, and inclusion, we work to make a lasting impact for individuals and families in need.

Our youth opportunity goal is to remove barriers from early childhood to successful adulthood and we fund nine programs and collaborations. Our healthy community goal is to maximize wellness, knowing that it can be different for each person. We fund 16 different programs and four initiatives to advance the work. Our community resiliency work focuses on removing barriers for those with low incomes, aging, and people with disabilities to get where they want and need to go, as well as our disaster work and environmental sustainability. We fund two programs and two initiatives including launching the nation's only free wheelchair charging station network county-wide. Our financial mobility impact area is to move families forward by reducing toxic stress with Hope Chest investments to pay a bill that creates an obstacle to their success. We fund seven programs and four initiatives focused on financial mobility.

We prepare income taxes for free with both Volunteer Income Tax Assistance and Facilitated Self-Assistance, which is how people maximize their refund, directly improving their lives. Our program funding serves two out of three people in our county and our impact work serves all of Jackson County.

1b. United Way of Jackson County has 15 committees and councils that are focused on areas ranging from finance and investment, disaster resiliency, income and health, and public policy. We have a board of 31 with members representing business sectors, health, nonprofits, and government organizations. Our volunteer base includes 1,500 active community members. All of which makes the work of United Way possible. In terms of Hope Chest, 75 distinct agencies referred their clients to us during fiscal year 2025. This shows that United Way is trusted and relied upon when it comes to addressing urgent community needs.

1c. For an individual to access Hope Chest funds we require a referral by a case worker, social worker, or similar professional that has worked with the client, has vetted the situation, and is providing other services to help ensure their success. One of the reasons we work with agencies instead of directly with clients is we do not want to re-traumatize individuals with being shuffled around and having to tell their stories multiple times.

RECIPIENT AGENCY United Way of Jackson County
PROGRAM/PROJECT TITLE Hope Chest

Continue from previous page (if needed):

2a. In our community, even a necessary car repair can jeopardize employment and lead to housing instability for those living on the edge. Since its inception in 2008, our services have helped families avoid eviction, manage medical expenses, navigate legal challenges, and maintain reliable transportation—all essential factors for maintaining stability and fostering upward mobility.

2b. Part of the DNA of our organization is to create change, and while $500 in financial assistance does not solve any root causes, it does certainly help reduce the toxic stress that so many in our community face. Reducing toxic stress enables our community members to build stronger social connections, improves emotional regulation, and leads to overall better physical health.

2c. Having operated for the last 18 years, Hope Chest is making a real difference in the lives of our community members. While we do not interact directly with the community members needing assistance we often receive thank you notes detailing how our financial assistance made a difference in their lives. Additionally, we have several letters of support from agencies such as the Housing Authority of Jackson County, OHRA, and the Teresa McCormick Center.

2d. Hope Chest measures success through a variety of key metrics, including the number of clients served, referring partners, and the average amount and type of assistance provided. Operating on a referral-only basis, we ensure payments are made directly to vendors. Our documentation includes essential client details such as name, referring agency, required amount, type of need, as well as additional information like income source, household size, number of children, and any disabilities. Each quarter, United Way assesses the impact of Hope Chest by reviewing remaining funds, the number of individuals and families helped, the referring agencies, and collecting success stories from recipients who are willing to share their experiences.

3. At its core, United Way of Jackson County believes people are connected and interdependent. When we reach out a hand to one, we influence the condition of all. We all win when children form healthy attachments through a loving family, when they succeed in school, graduate and make successful transitions to adult responsibilities. We all win when families are financially stable, when people have good health, and when people are engaged and connected.

While there are several agencies in the Valley that assist children and families with common expenses like rent and utilities, we are one of the only organizations offering support for less typical needs, such as car repairs, childcare costs, medical and mental health expenses, cell phone bills, dietary-specific food subscriptions, and other hard-to-cover areas. Additionally, we pride ourselves on having the fastest turnaround times in the region—once a referral is made, we can issue and mail a check within 24-48 business hours. We understand the challenges of red tape and bureaucratic delays and work diligently to minimize these while ensuring our practices remain sound. In 2025, we received referrals from 72 distinct agencies, including the Teresa McCormick Center, ACCESS, Head Start, law enforcement, local school districts, and churches. These partners consistently recognize us as the agency with the quickest response time and often the only one able to meet the specific needs of individuals. We are committed to nurturing our existing relationships with referring organizations while also expanding our network to better serve the community.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY United Way of Jackson County

PROGRAM/PROJECT TITLE Hope Chest

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2024 - 6/2025

   b. Administration & Fundraising expense: $ 450,465.00 20 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

   c. Program expense $ 1,815,510.00

   d. **Total expenses**: $ 2,265,975.00

   e. Sources of **revenue**:

Memberships/ individual contributions	$1,169,814.00	57 %
Raised through fundraising activities	$0.00	0 %
Government	$308,813.00	15 %
Foundations	$416,651.00	20 %
United Way	$0.00	0 %
Fees for Service	$0.00	0 %
Other (reimbursements, payments, bequests, etc.)	$145,882.00	7 %

   f. **Total revenue**: $ 2,041,160.00

2. What is the highest level of financial reporting required by your funders?
   Audit

3. Briefly describe your sustainability outlook for the project/program in the future.
   We will continue to apply for grants to sustain this program. Hope Chest has been in existance since 2008 and will remain for the forseeable future.

4. a. Total organizational annual budget **current ongoing** fiscal year: 1,928,015.00

   b. Total program/project budget current ongoing fiscal year: 275,000.00

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, **2026,** to June 30, **2027**(*If Applicable)

RECIPIENT AGENCY United Way of Jackson County

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$0.00	$0.00
City of Ashland Funds	$0.00	$0.00
Jackson County Funds	$0.00	$0.00
CDBG (identify)	$0.00	$0.00
Other State or Federal Funds	$0.00	$115,000.00
United Way Funds	$0.00	$0.00
Other Funds (identify) See budget	$0.00	$1,763,564.00
SUB TOTALS	$0.00	$1,878,564.00
TOTAL REVENUE (Pending & Secured)		**$1,878,564.00**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries (We do not seperate these expenditures)		$
Total Benefits		$
TOTAL PERSONNEL SERVICES		**$710,000.00**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Restricted grants		$500,000.00
Allocations		$250,000.00
Operations (office, dues, supplies, phones, etc.)		$409,815.00
		$
		$
		$
TOTAL MATERIALS & SERVICES		**$1,159,815.00**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$0**
TOTAL EXPENDITURES (Sum of A, B & C) $1,869,815.00		**$**

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, **2026** to June 30, **2027** **(*If Applicable)**

RECIPIENT AGENCY United Way of Jackson County

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$20,000.00	$0.00
City of Ashland Funds	$20,000.00	$0.00
Jackson County Funds	$0.00	$0.00
CDBG (identify)	$0.00	$0.00
Other State or Federal Funds	$0.00	$0.00
United Way Funds	$0.00	$0.00
Other Funds (identify)	$15,000.00	$220,000.00
SUB TOTALS	$55,000.00	$220,000.00
TOTAL REVENUE (Pending & Secured)		**$275,000.00**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries (We do not seperate these expenditures)		$27,500.00
Total Benefits		$
TOTAL PERSONNEL SERVICES		**$27,500.00**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Hope Chest vendors		$247,500.00
		$
		$
		$
		$
		$
TOTAL MATERIALS & SERVICES		**$247,500.00**
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$0**
TOTAL EXPENDITURES (Sum of A, B & C) $275,000.00		**$**

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY United Way of Jackson County

PROGRAM/PROJECT TITLE Hope Chest

I.			*# Whole Program*	*# Ashland*
	Gender	Female	307 (Other16)	44 (Other 5)
		Male	127	15
II.		Other	450	64
		Totals		
	Age*	0 to 5	22	3
		6 to 12		
		13 to 17	90	13
		18 to 30		
		31 to 40		
		41 to 50	229	32
		51 to 61		
		62 +	109	16
		Unknown		
		Total	450	64

*at point of entry for service

IV. Race/Ethnicity

	#Whole Program	*Ethnicity Hispanic/Latino**	*# Ashland*
White	322	4	46
Black/African American	26		6
American Indian/Alaskan Native	23		5
Native Hawaiian/other Pacific Islander	3		2
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial			
Other	12	70	1
Totals	389	74	60

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY United Way of Jackson County
PROGRAM/PROJECT TITLE Hope Chest

1. **Number of board members required in bylaws?** **Minimum** 23 **Maximum** 35
2. **Number of board members currently active?** **# Voting** 31 **Vacancies** 0
3. **Average percentage board meeting attendance (over last completed year):** 89 **%**
4. **Percent of board in attendance required for a quorum:** 51 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
Executive Committee	10
Finance Committee	12
Income and Health Committee	18
Public Policy Council	11
Strategic Visioning	9

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	29	
Black/African American	1	
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White	1	
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other		3
Totals	31	3

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

2025-26 Board of Directors

As of January 27, 2026

Erick Acosta
Road to Success
16 N Riverside Ave, Suite 208
Medford, OR 97501
(541) 951-0740 C
acostaeric23@gmail.com

Angela Beeks
Human Bean, The
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(541) 608-0564 W
Angela.beeks@thehumanbean.com

Amy Belkin
Teresa McCormick Center
Harry & David
2500 S Pacific Hwy
Medford, OR 97501
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Discipler_felan@felangroupllc.com

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Cathy Noah (BD PRES.)
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Cooper Whitman
Pacific Power
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(541) 776-5406 W
Cooper.Whitman@PacifiCorp.com

PRESIDENT: **Cathy Noah**
STAFF: **Dee Anne Everson**

RECEIVED JUN 2 3 1995

Internal Revenue Service

Department of the Treasury

District
Director

P.O. Box 2350 Los Angeles, Calif. 90053

United Way of Jackson County, Inc.
Post Office Box 4664
Medford, OR 97501-0188

Person to Contact: Gilda Lewis

Telephone Number: (213)894-2336

Refer Reply to: EO061495

Date: June 21, 1995

EIN: [redacted]

Dear Taxpayer:

This letter is in response to your request for a copy of the determination letter for the above named organization.

Our records indicate that this organization was recognized to be exempt form Federal income tax in July 1969 as described in Internal Revenue Code Section 501(c)(3). It is further classified as an organization that is not a private foundation as defined in Section 509(a) of the Code, because it is an organization described in Section 170(b)(1)(A)(vi).

The exempt status for the determination letter issued in July 1972 continues to be effect.

If you need further assistance, please contact our office at the above address or telephone number.

Signed,

Gilda Lewis

Gilda Lewis
Disclosure Assistant

United Way of Jackson Co., Inc.
2025-2026 Budget

	2025-26 APPROVED Budget
Ordinary Income/Expense	
Income	
4005 · CAMPAIGN REVENUE	1,300,000
4006 · THIRD PARTY PAYER CONTRA INCOME	-140,000
4007 · DESIGNATIONS - CONTRA INCOME	-14,000
4206 · CAMPAIGN GRANTS RESTRICTED	625,000
4208 · WiLL CAMPAIGN RESTRICTED	60,000
4120 · INVESTMENT INCOME	0
4242 · INTEREST INCOME	0
4195 · MEETING / EVENT REVENUE	3,500
4239 · MISCELLANEOUS INCOME	500
4345 · GIFTS IN KIND	15,000
4098 · TRANSFER FROM ENDOWMENT	28,564
4405 · DESIGNATIONS to UW	0
4145 · BEQUEST	0
Total Income	1,878,564
Gross Profit	1,878,564
Expense	
6555 · SALARIES & BENEFITS	710,000
7300 · PROFESSIONAL SERVICES	29,000
7345 · SUPPLIES/PRINTING	22,500
7350 · CFD CAMPAIGN EXPENSES	600
7409 · OFFICE EXPENSE	57,000
7434 · IT EXPENSE	16,000
7450 · ADVERTISING EXPENSE	25,000
7459 · BUSINESS INSURANCE	8,000
7464 · FEES	15,000
7504 · TRAINING & MEETINGS	25,000
7529 · OTHER EXPENSES	250
7645 · UNCOLLECTABLE PLEDGES	25,000
7695 · DEPRECIATION	35,000
8000 · ALLOCATIONS	250,000
8988 · FIRE ASSISTANCE	50,000
8401 · RESTRICTED GRANT EXPENSE	500,000
8900 · UNITED WAY DUES	27,465
8945 · COMMUNITY BUILDING EXPENSE	25,000
8960 · DAY OF CARING	12,000
8961 · WiLL EXPENSE	20,000
8980 · PUBLIC AWARENESS	5,000
8999 · BUILDING EXPENSE	12,000
Total Expense	1,869,815
Net Ordinary Income	8,749

United Way of Jackson Co., Inc.
2025-2026 Budget

	2025-26 APPROVED Budget
Other Income/Expense	
Other Income	
4600 · CAPITAL CAMPAIGN	0
4096 · INVESTMENT ACCT CHG IN VALUE	0
4097 · CHANGE IN TRUST VALUE	0
Total Other Income	0
Net Other Income	0
Net Income	8,749

Hope Chest Budget 2026-27

Income	Budget	Pending	Secured
City of Medford	20,000.00	x	
City of Ashland	20,000.00	x	
Ames Fluhrer Fund OCF	25,000.00		x
Anna May Family Foundation	10,000.00		x
Carrico Family Foundation	75,000.00		x
Chaney Family Foundation	5,000.00		x
DeBoer Family Foundation	2,500.00		x
Individual Donors	45,000.00		x
Leightman Maxey Foundation	15,000.00	x	
Naumes Family Foundation	7,500.00		x
Roundhouse Foundation	15,000.00		x
Walker Fund of OCF	75,000.00		x
Total	275,000.00		

Expense	
Administrative Expense	27,500.00
Vendors	247,500.00
Total	275,000.00

Note:

1. Hope Chest is charged 10% administrative expense.
2. If less funds are raised, less funds are distributed.

City of Ashland Social Service Grant Program

Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Society of St. Vincent de Paul, Ashland/Talent Conference **DATE:** 02/06/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) St. Vincent de Paul, Our Lady of the Mountain Conference

ADDRESS 987 Hillview Drive, Ashland Oregon 97520

Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Keeping the utilities on in Ashland households

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Strategic Plan, Goal 5: "Seek opportunities to enable all citizens to meet basic needs."

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ $ 25,000

GRANT CONTACT (If other than Executive Director listed below)

Name Vicky Weiss

Telephone (541) 708-5173 **E-mail** vweiss590@gmail.com

EXECUTIVE DIRECTOR INFORMATION

Name Kathy Begley

Telephone (541) 826-5722 **E-mail** begley2001@aol.com

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Signature of Board President

SEE SEPARATE PAGE FOR BOTH SIGNATURES

Type Name

Signature of Executive Director/CEO

Kathy Begley

Type Name

City of Ashland Social Service Grant Program
Application and Forms

2026 - 2027

ORGANIZATION LEGAL NAME: Society of St. Vincent de Paul, Ashland/Talent Conference **DATE:** 01/31/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) St. Vincent de Paul, Our Lady of the Mountain Conference

ADDRESS 987 Hillview Drive, Ashland Oregon 97520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [redacted]

PROGRAM/PROJECT TITLE: Keeping the utilities on in Ashland households

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Strategic Plan, Goal 5: "Seek opportunities to enable all citizens to meet basic needs."

AMOUNT REQUESTED from this funder for this program/project 2026-2027 $ $ 25,000

GRANT CONTACT (If other than Executive Director listed below)
Name Vicky Weiss
Telephone (541) 708-5173 **E-mail** vweiss590@gmail.com

EXECUTIVE DIRECTOR INFORMATION
Name Kathy Begley
Telephone (541) 826-5722 **E-mail** begley2001@aol.com

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Signature of Board President

Kathy Begley
Type Name

Signature of Executive Director/CEO

Kathy Begley
Type Name

1

SUMMARY INFORMATION

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

1. **Program/project is:** **new** ☐ **established/continuing** ☑
   pilot ☐ **If pilot, expected duration** _____

2. Primary geographic location and population program funding will serve. (*If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*

   This grant will will be used to help keep utilities on in residences of those living in Ashland.

3. What will this funding enable?

   Funding of this initiative will allow us to aid approximately 100 households with their utility bills. Calls for assistance with utilities currently exceed anything we have seen in the past, and the amounts owed are larger than we have ever seen before. While our St. Vincent de Paul volunteers came to the aid of over 1200 individuals during 2025, helping with a variety of needs, nearly 20% of our budget (over $40,000) went to utility payments. More than half of that sum went directly to

4. Number of volunteers this program/project will engage: 16

   Number of paid program employees this program/project will engage: 0

5. Total number volunteer's agency utilizes: 29*

   Total number of paid agency employees: 0

6. Outline key strategies of the project/program with timeline and staff structure.

   Though our organization helps those in need in a variety of ways, keeping people safely housed in Ashland is our number one priority. In our last fiscal year, 95% of our budget was spent on keeping people housed, housing deposits, and utility costs. Our volunteers answer our helpline and work in teams of two five days a week from 9:30 AM until 4:00 PM, addressing the needs of those who call on us. We come to the aid of callers once per year (not wanting anyone to become dependent upon our assistance) with a set amount offered. When our financial assistance is insufficient to meet a caller's need, we reach out to other agencies. (Each volunteer is equipped with a seventeen-page list of other organizations offering assistance with specific information about the kind of assistance offered), and our twice monthly meetings allow us to keep up to date on what other agencies are offering.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

   St. Vincent de Paul meets a crucial need for the citizens of Ashland: the ability to offer same-day assistance when necessary. No other social service organization in our area is able to respond at the "eleventh hour" to the needs of those who call. We are effectively an emergency helpline, and other social service organizations know this. They routinely direct those with pressing needs to us. (On any given day on the helpline as many as half the calls will be from other agencies seeking assistance for their clients.)

   *This number includes those who serve as translators and accountants only.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

*Answer all three narrative questions. Use **only the space provided – place the question number and letter preceding each answer;** the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

a. mission statement, purpose(s) and how this program/project fits with your mission.
b. your organization's unique qualifications to accomplish your program outcomes?
c. what approach is your agency taking to serve clients and train staff on trauma informed care?

2. What:
a. issues(s) is the project/program intended to impact,
b. strategy for change your program will be based on,
c. evidence that the project/program will be successful in the proposed setting, and
d. what tool(s) will you use to measure outcomes?

3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1. a. The Rogue Valley District Council of St. Vincent de Paul is dedicated to providing compassionate, prompt support and care to the poor and needy in Jackson County, regardless of age, race, religion, creed, sex, sexual preference or ethnic origin. Although the Society's name is recognized around the world, each Council is locally organized, funded, and staffed. Our Council has no financial connection or obligation to any church; no effort is made to preach, convert, or proselytize. Our Council was established in 1982 and has nine operating divisions or conferences, of which the Ashland/Talent Home Visit Conference is one. Because we have no paid employees and rely on volunteers to deliver all of our services, all of the funds we obtain are used to help those in need in Ashland and Talent as we offer a wide array of services. Because we have worked in the Ashland and Talent area for so long and work so closely with a host of other agencies, we are well known. Many of our volunteers have worked with us for many years, so we have established networks that allow us to seek additional aid for individuals and families when it is needed. We also have Spanish speakers available to assist with non-English speakers.

b. We are unique in that we are the only entity serving Ashland that offers same-day assistance to those in need. Many of those who call on us do so at the "eleventh hour" when they are facing same-day shut-offs. Because our helpline is staffed from 9:30 AM until 4:00 PM five days a week, we are there to receive calls not only from those in need but also from other service agencies dealing with clients. They call, knowing we are able to provide same-day assistance.

c. In our work we encounter clients from a wide range of diverse backgrounds and experiences. The Rule of St. Vincent de Paul and our ongoing training enable us to be sensitive to the impact upon our clients of both overt discrimination and micro-aggressions. We endeavor to be a deeply respectful and supportive presence in their lives, while providing assistance in difficult times. Our volunteers meet bi-monthly to discuss difficult cases, to receive additional training, and to review our Rule and Manual outlining the practice of trauma-informed care. While we work closely with Jackson County Mental Health, our volunteers are all provided with a written list of "Crisis De-Escalation Techniques," which are very helpful.

2. a. St. Vincent de Paul seeks funding to address the City Council's strategic plan, Goal 5: "Seek opportunities to enable all citizens to meet basic needs." When the Covid pandemic struck, it affected everyone but especially those residents living below the poverty level. As the city of Ashland struggled, the city utility office closed and shut-offs were suspended, giving those struggling a reprieve.

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference
PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

Continue from previous page (if needed):

When the pandemic subsided, the office needed time to train new staff, and utility bills continued to accrue without penalty. But as city services have come back, many residents have found themselves owing huge sums to the city in order to keep electricity on and water flowing. Our helpline volunteers—many with long histories of working as volunteers with our St. Vincent de Paul—have never before encountered callers with utility bills this large. It is not at all unusual to hear from residents owing bills in the thousands and facing immediate shut-offs.
We may be amazed by these huge sums, but as struggling families attempted to stay fed and safely housed, they practiced "triage." While the utility office was closed, it was a case of "out of sight; out of mind." Families dealt with immediate needs. Since the pandemic, the city has put in place additional assistance measures to help those who need them, and we make sure that callers are aware of these new assistance measures as we offer them financial assistance.
This Social Services grant request will enable us to come to the aid of struggling families and individuals (many of these senior citizens on fixed incomes) who tend to call on us when they are facing immediate utility shut-offs. That point noted, we allow households to call on us just once a year and set a financial limit on the amount we provide so that people do not become dependent upon our assistance, and we are thus able to help many individuals. When the need exceeds our financial limits, we work closely with other agencies to obtain the additional assistance callers need.

2. b. This proposal does not exactly propose a "strategy for change," but our efforts in the past year have definitely been enhanced. Since the federal government has cut back on its safety net programs, nonprofits have in many cases adjusted their funding priorities. In the face of this shifting landscape, the president of our conference has assigned individual volunteers to serve as direct liaisons to other social service organizations. (I myself am the liaison to the Salvation Army.) This system allows us to keep up to date on the assistance being offered by other agencies with which we cooperate regularly.

2. c. and d. Proof of the efficacy of our efforts lies in the number of families and individuals able to stay warm with the lights on and water flowing. We have a robust computer system that allows easy access to the records of those we help with detailed information about the circumstances facing the caller along with a record of any financial assistance we have provided in the past. As noted, callers are able to seek our assistance once per year with a limit set on the amount. Our volunteers are able to exceed these financial limits in extreme circumstances.

3. Our city benefits from the work we do because we are that singular emergency entity keeping our most vulnerable residents safely housed and their utilities operational. Our volunteers are routinely called by other agencies to help those whom they are assisting. (These include OHRA, ACCESS, United Way, Salvation Army, Goodwill, Maslow, local churches, etc.) When the need of a caller exceeds our financial resources, we call upon these other agencies to help. Every one of our volunteers receives six months of training, "shadowing" volunteers who work the helpline; every volunteer is equipped with a seventeen-page list of resources organized by category of assistance and complete with hours, location, and specifics regarding the assistance rendered. Every volunteer works with a partner and has access to our experienced volunteers familiar with the work we do and the many agencies with which we cooperate.

Please note that while we are under the umbrella organization of the St. Vincent de Paul Council, based in Medford, and receive some support from them, we do most of our own fundraising. All of the funds we obtain are expended solely in Ashland and Talent. Funds obtained with this grant will be used solely in Ashland.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

1. For most **recently completed** 990:

   a. FISCAL YEAR (mm/yyyy – mm/yyyy): 10/2024-09/2025

   b. Administration & Fundraising expense: $ 1,027 .5 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

   c. Program expense $ 42,958

   d. **Total expenses**: **$** 193,853

   e. Sources of **revenue**:

Memberships/ individual contributions	$ 96,000	47 %
Raised through fundraising activities	$ 90,811	43 %
Government	$ 0	0 %
Foundations	$ 18,500	9 %
United Way	$ 0	0 %
Fees for Service	$ 0	0 %
Other (reimbursements, payments, bequests, etc.)	$ 3,554	1 %

   f. **Total revenue**: **$** 208,865

2. What is the highest level of financial reporting required by your funders?
   990 (from Medford Council, available upon request)

3. Briefly describe your sustainability outlook for the project/program in the future.
   The Manual of the Society of St. Vincent de Paul, p. 26: "Surplus funds should be shared generously with more needy Conferences or the special works of the District Council." That stipulation noted, we make it a practice to maintain approximately 25% of our revenue in our accounts. If it looks as though we are in danger of going below that amount, we lower the amount we are able to provide to those who call on us and work with callers, advising them on other sources of assistance.

4. a. Total organizational annual budget **current ongoing** fiscal year: 215,000

   b. Total program/project budget current ongoing fiscal year: 50,500

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, **2026,** to June 30, **2027**(*If Applicable)

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference--SEE ATTACHED SHEET

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$	$
Jackson County Funds	$	$
CDBG (identify)	$	$
Other State or Federal Funds	$	$
United Way Funds	$	$
Other Funds (identify) Council	$	$
SUB TOTALS	$	$
TOTAL REVENUE (Pending & Secured)		**$**
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$0
Total Benefits		$0
TOTAL PERSONNEL SERVICES		**$**
B.MATERIALS & SERVICES: (please detail other major budget categories)		
		$
		$
		$
		$
		$
		$
TOTAL MATERIALS & SERVICES		**$** 0
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		**$**
TOTAL EXPENDITURES (Sum of A, B & C)		**$**

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, **2026** to June 30, **2027 (*If Applicable)**

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	$	$
City of Ashland Funds	$ 25,000	$
Jackson County Funds	$	$
CDBG (identify)	$	$
Other State or Federal Funds	$	$
United Way Funds	$	$
Other Funds (identify) grants, donations, collections	$ 25,000	$ 21,120
SUB TOTALS	$	$
TOTAL REVENUE (Pending & Secured)	$50,000	$ 21,120
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		$ 0
Total Benefits		$ 0
TOTAL PERSONNEL SERVICES		$ 0
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Office Supplies		$ 312
Miscellaneous (phone, bank services)		$ 120
		$
		$
		$
		$
TOTAL MATERIALS & SERVICES		$ 432
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		$
Furnishings		$
Other capital expenses /Identify:		$
TOTAL CAPITAL OUTLAY		$ 0
TOTAL EXPENDITURES (Sum of A, B & C)		$

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

I.

		# Whole Program	*# Ashland*
Gender			
Age*	Female	582	398
	Male	286	202
II.	Other	145	77
	Totals		
	0 to 5	84	39
	6 to 12	119	79
	13 to 17	80	51
	18 to 30	161	98
	31 to 40	176	125
	41 to 50	128	89
	51 to 61	151	100
	62 +	127	96
	Unknown		
	Total	1026	677

***at point of entry for service**

IV. Race/Ethnicity

	#Whole Program	*Ethnicity Hispanic/Latino**	*# Ashland*
White			
Black/African American			
American Indian/Alaskan Native			
Native Hawaiian/other Pacific Islander			
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial			
Other			
Totals			

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Our St. Vincent de Paul keeps meticulous records. These show that during 2025, we came to the aid of over 1200 individuals. Asking callers in distress for the particular kinds of demographic details listed above often feels intrusive. Our callers are people in need who experience indignities of every sort, every day. We do all we can not to contribute to their distress. The gender and age numbers above are those we have obtained when it has been possible to do so. We do NOT collect ethnic nor racial information from those we help.

Note: for some reason, this electronic form will not allow me to total the gender and age categories above, nor will it allow me to list the total of the expenditures on the previous page.

Agency Board Profile

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference (The Board is that of our Rogue Valley Council)
PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

1. **Number of board members required in bylaws?** **Minimum** 21 **Maximum** 30
2. **Number of board members currently active?** **# Voting** 21 **Vacancies** 0
3. **Average percentage board meeting attendance (over last completed year):** 75 **%**
4. **Percent of board in attendance required for a quorum:** 51 **%**
5. **List various board, advisory and ad hoc committees and the number of people on each.**

Committee	*Number of Members*
Executive Committee	6

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	Number Identifying	*Ethnicity Hispanic/Latino**
White	20	1
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other		
Totals	20	1

** Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.*

St. Vincent de Paul Rogue Valley Council

Organizational Chart
Council Board of Directors and Conference Presidents

Council President Kathy Begley
h 541-826-5722 c 541-951-6012
email: begley2001@aol.com

Board Secretary
Nancy Fleming
C 860-693-3891
H 541-499-6466

Executive Committee

Dennis Mihocko	Len Hebert	Rich Hansen	Tom Fleming	Socorro Holloway	Kathy Begley	Don Krolak
c 541-531-3832	c 541-944-6950	h 541-770-6062 c 541-261-6855	h 541-499-6466 c 541-531-1158	h 541-776-4138	c 541-951-6012 c 541-821-5953	c: 916-225-0223

VP Facilities
Dennis Mihocko
c 541-531-3832

VP Grants
Jay Stockton
H 541-664-3223
C 541 261-9475

Treasurer
Tom Fleming
h 541-499-6466

Volunteer Coordinator
Kathy Ascuena
541 664-3211

Publicity
Michael Morgan
c 503-781-9216

Spirituality
Fr Jim Clifford
c 541-944-3536

Conferences

1-SocSvc
Sacred Heart

Pres: Marilyn Gradwell
h 541-944-3985
VP: Fr. Jim Clifford, VP
541-944-3536

Treasurer:
Anita Chester
h:541-512-9684
c:541-890-1147

2-Store
Blessed Anna Maria

Pres: Ralph Browning
c 541-261-0866
VP: Jackie Cavanaugh
h 541-772-8359
MGR: Karen McNeilly
h 541-855-2008

Treasurer:
Bunny Grimes
541-779-5807

3-Kitchen
St. Teresa

Co-Pres: Helen Smith
h 541-512-9153
Bruce Pellecchia
541 840-7694
MGR: Charlotte Martinson
H:541- 499-8992

Treasurer:
Charlotte Martinson
h:541-499-8992

4-Urban Rest Stop
St. Francis of Assisi

Pres:
Jerry Pendzick
c 619-823-2129

Treasurer:

5-Office
St. Anna

Pres: Nancy Fleming
h 541-499-6466
c 860-693-3891

Treasurer:
Nancy Fleming
h 541-499-6466
c:860-693-3891

6-Ashland SServ
Our Lady of the Mountain

Pres:
Claudia Van Dyke
458-246-9000

Treasurer:
John Engelhardt
541-324-9541

7-Pantry
Shepherd of the Valley

Pres: Vacant

MGR: Beth Hunter
h 541-664-3481
Glen Cote
c 541-261-8322

Treasurer:
Gwen Matocha
541-773-6849

8- Family Shelter
St. Anthony

Pres. Dennis Mihocko
c 541-531-3832
MGR. Nick Koutsouros
c541-778-8104

Treasurer:
Socorro Holloway
c: 541-821-5953

9-HomeVisits/ MedAssist
St. Augustine

Pres: Don Krolak c 916-225-0223

Treasurer:
C Forsythe
h 541-732-0668
c 541-282-4575

March 21, 2025

Internal Revenue Service
District Director

Department of the Treasury

P O Box 2350 Room 5137
Los Angeles, CA 90053

Employer Identification Number:
[redacted] New [redacted]

Date: DEC. 15, 1986

Case Number:
[redacted]

SOCIETY OF ST VINCENT DE PAUL
ROGUE VALLEY COUNCIL
PO BOX 1663
MEDFORD, OR 97501

Contact Person:
KORELL, ANTOINETTE
Contact Telephone Number:
(213) 894-4405

Our Letter Dated:
Aug. 29, 1984
Caveat Applies:
no

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization which is not a private foundation until the expiration of your advance ruling period.

Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi). Your exempt status under section 501(c)(3) of the code is still in effect.

Grantors and contributors may rely on this determination until the Internal Revenue Service publishes a notice to the contrary. However, a grantor or a contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section 509(a)(1) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(1) organization.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If the heading of this letter indicates that a caveat applies, the caveat below or on the enclosure is an integral part of this letter.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,

Frederick C. Nielsen

Frederick C. Nielsen
District Director

Letter 1050(CG)

Society of St. Vincent de Paul
Rogue Valley Council
Conference No. 6 OUR LADY OF THE MOUNTAIN

Budget **Upcoming Fiscal Year**

	Budget FY25-26
Income	
Support from Council	$88,000
Donations	
Collections	$47,000
Other Donations	$30,000
Grants Received	$50,000
Miscelaneous	$0
Refunds	$0
Total	**$215,000**
Expenses	
Operating Expenses	
Office Supplies	$1,300
Miscellaneous (Phone service, bank	$500
Total	**$1,800**
Neighbor Expenses	
Utilities	$50,500
Motel	$1,000
Housing Deposit	$14,000
Mortgage	$2,000
Transportation	$1,850
Insurance & Registration	$1,200
IDs & Birth Certificates	$600
Phone	$350
Rent	$135,000
Car Repair	$3,000
Medical	$700
Other (Clothing, household, etc.)	$3,000
Total	**$213,200**
Difference between Income & Expenses	**$0**

NOTES

City of Ashland
Social Service Grant Program
Strategic Plan
Adopted December 16, 2014

Introduction-*Purpose of the Plan*

The City of Ashland is committed to supporting the agencies and organizations that work to improve the lives of its most vulnerable citizens.

The Strategic Plan for the use of Social Service Grant funds is intended to provide guidance for applicants and assistance to elected and appointed officials by providing a framework for allocating resources and for tracking progress on identified goals and community priorities.

The Strategic Plan will be updated at four year intervals (every two grant cycles) to be responsive to the changing demographics of the community and to the social and human service needs of the citizenry. The updates may include shifting goals and measurable objectives to more efficiently and effectively address community wide issues.

History/Background

The City of Ashland established the Social Service Grant Program in 1986 due to a reduction in Federal Revenue Sharing funds which had, in prior years, provided funding to the City to support the activities of non-profit and social service agencies that provided services to vulnerable Ashland Citizens. Resolution 86-35 was adopted in recognition that: "*the funding of health care and social service needs is an important City function which contributes to the health and well-being of the citizens of Ashland*." The Council at that time opted to maintain funding for social services with an emphasis on health care in recognition of the City's tourism based service sector economy, and felt that it was "*appropriate for the City to address the problems created by this type of economy*"[1]. Since that time the City of Ashland has committed a portion of the general fund in support of activities that address the health and social service needs of the Ashland community.

Today's Community Snapshot

The ability of working class individuals and families to afford housing and secure employment that offers compensation that is commensurate with the local cost of living, has far reaching impacts on the community. Reduced discretionary spending negatively impacts the local economy, the physical and mental wellbeing of families, and inhibits access to good nutrition and basic health care. Community diversity, vibrancy, and resilience are all impacted by an individual's or families' ability to work and reside in their community. This has been and continues to be a challenge for the Ashland community.

- **Population:** The City of Ashland has a population of just over 20,295 people.[2]
- **Age:** The population of Ashland has seen an increase in older individuals and a decrease in younger families with children. These findings are evident in the most recent census data; which shows that approximately 83% of the population is 18 years old or older.[3] The largest age group is 45-54 year olds at 13.9%[4], and is echoed in the findings of various demographic reports and community assessments.

[1] Philip Arnold, Former City Councilor.
[2] 2013 PSU Population Research Center estimate certified estimate.
[3] 2008-2012 ACS 5 year estimates.
[4] Ibid.

- **Income and Poverty:** The median income for a household in the city was $43,305, and the median income for a family was $58,616. About 18% of the population and 11.4% of families had incomes below the poverty level, with female headed households with children under 18 and those households with children under 5 experiencing the highest rates of poverty, at 42.2% and 43.4% respectively. 4.7% of individuals 65 years old and older are below the poverty level.[5]
- **Housing:** The City of Ashland has over 10,000 housing units. 53% of occupied housing units are owner occupied, and 46.1% are renter occupied[6]. In the 2012 National Citizen's Survey completed for the City of Ashland, the City met or exceeded most national benchmarks for citizen satisfaction for all but two categories; availability of affordable quality housing and employment opportunities. Availability of affordable quality housing and variety of housing options are comparatively lower than both national benchmarks and to other University communities with populations from 10,000 to 40,000 comparisons.[7] Similarly, Census data shows that 43% of homeowners with a mortgage and 54.5% of renters pay more than 35.0% of their income toward housing cost. [8]
- **Employment:** 2013 Ashland annual average unemployment rate was 6.7%.[9] Ashland School District reports that over half of the employees within Ashland live outside of the district and commute to work.[10]
- **Transportation:** When workers must live elsewhere and commute into or out of the community, this has a significant impact on other aspects of the community. Community diversity, vibrancy, and resilience are all impacted by an individual's or family's ability to work and reside in their community. Similarly, household transportation costs increase and traffic and air quality are impacted. This has been and continues to be a challenge for the Ashland community.
- **Health:** The social service grant program was originally established in part to address access to affordable health care, and while access to affordable health care continues to be a priority especially as the population ages, community feedback and demographic data has identified more pressing healthcare service needs. *The 2013 Community Health Assessment identified oral/dental health and mental health, especially as it relates to depression and suicide as the most urgent unmet health care needs within the community*. Further, community feedback identifies mental health disorders with co-occurring drug/alcohol addiction to be a need that is currently not adequately addressed in the Ashland community.

[5] Ibid.
[6] 2008-2012 ACS 5 year estimates
[7] 2012 National Citizen's Survey. https://ashland.or.us/Page.asp?NavID=15166
[8] Ibid
[9] Guy Tauer, Regional Economist, State of Oregon Employment Department.
[10] ASD 2012 Demographer's report. http://www.ashland.k12.or.us/Files/ASD%20Demographer%27s%20Report%202012.pdf

Community Strengths and Challenges

Ashland residents are civic minded, and work together to solve community issues through a strong commitment to community service.

While access to affordable health care continues to be an issue for many in the community, since the inception of the Social Service Grant Program many resources to address these concerns have been implemented.

Ashland's community groups, faith-based groups, civic groups, non-profit organizations, social service agencies, governmental agencies, and business groups have a history of successful collaboration.

Ashland's faith-based communities communicate and collaborate to problem solve and implement strategies to address community concerns.

High need individuals and those with challenging behaviors, such as those with dual diagnosis, (mental health and/or alcohol/drug addiction), physical, mental, or developmental disabilities, need more effective service options than the community currently provides.

There is a deficit of supportive services for vulnerable populations such as; peoples with developmental disabilities, people with mental health issues/frail/elderly populations, veterans, at-risk youth and homeless populations.

Working families and citizens earning below the median income for the Medford/Ashland area have a difficult time finding rental or ownership housing options in Ashland which are commensurate with their incomes.

There is a lack of transitional housing options for families and individuals who are working toward self-sufficiency.

Social Services Grant Program Mission Statement

To fund support services that improve the lives of Ashland residents, assist individuals and families in the community and promote personal and community safety, health, and wellbeing.[11]

Strategic Priorities: *(These strategic priorities were identified through a process which included community outreach, grantee/stakeholder feedback, and key informant interviews. These priorities are not in any priority order.)*

- Assistance to obtain and/or maintain housing[12]
- Supports to increase accessibility and availability of transportation options/services[13]
- Services for people with mental health issues[14]
- Services for people with drug and alcohol addiction
- Services for at-risk youth

Implementation Strategies (*which may include, but is not limited to the following*)

- Allocate resources to activities which address an identified strategic priority
- Support innovative proposals
- Support proposals that leverage community collaborations or enhance community or existing regional partnerships[15]
- Support proposals which have a proven capacity to carry out their stated goals/meet proposed numerical outcomes
- Support proposals which are ready to proceed
- 20% of the overall grant allocation will be made available to support small grants; small grants include any request of up to $5000, should the City not receive enough applications to allocate the balance of funds. The City will have the discretion to allocate any remaining balances to small grants.

Outcome Measurement

- Request the grant recipients to list their anticipated measurable activity/program outcomes
- Review and compare applicants' identified anticipated outcomes annually and at the completion of the grant year using a standardized evaluation matrix. *(Example***:** Number of Ashland Residents who; received housing support, participated in life skill training, received job search assistance, etc.)
- The Commission will host stakeholder/applicant/community forum every four years to elicit feedback on grant making process and reporting requirements

[11] Consistent with Council priority strategic plan goal 5: "*Seek opportunities to enable all citizens to meet basic needs.*"
[12] Consistent with Council priority strategic plan goal 5.2: Support and promote, through policy, programs that make the City affordable to live in.
[13] Consistent with Council priority strategic plan goal 3.4: Support RVTD in fulfilling and expanding its mission.
[14] Consistent with Council priority strategic plan goal 5.1: Examine means and methods by which to improve access to mental health services in Ashland for Ashland citizens who need them.
[15] Consistent with Council priority strategic plan goal 5.3: Leverage partnerships with non-profit and private entities to build social equity programming.

Council Business Meeting

Date: April 21, 2026

Agenda Item	Affordable Housing Trust Fund Evaluation and Award
Department	Community Development
From	Linda Reid, Housing Program Manager

TIME ESTIMATE
30 Minutes

CATEGORY
Action Needed - Motion to approve an action

SUMMARY
The City Council is to award up to $200,000 in Affordable Housing Trust Funds.

The City of Ashland has received four applications totaling $401,460 in competitively available Affordable Housing Trust Funds (AHTF). On March 26, 2026, the City of Ashland's Housing and Human Services Advisory Committee conducted a public hearing to evaluate grant requests for the 2026 AHTF funds, recommending allocations for City Council consideration. Staff assessments and allocation recommendations are detailed in the subsequent pages.

POLICIES, PLANS & GOALS SUPPORTED

- Resolution 2008-034 – A resolution establishing policies and procedures for administration of the Affordable Housing Trust Fund (AHTF).

BACKGROUND AND ADDITIONAL INFORMATION
The purpose of the Affordable Housing Trust Fund (AHTF) is to support and finance projects that address critical housing needs within the community. It aims to facilitate the development of housing options that are accessible and affordable, thereby helping individuals and families transition into permanent, stable living situations. By allocating funds to projects that either directly provide needed housing or assist in moving people into permanent housing, the AHTF plays a pivotal role in mitigating housing insecurity and enhancing the quality of life for residents. Through these efforts, the AHTF contributes to the broader goal of building inclusive, sustainable communities where every individual has the opportunity to thrive in a safe and affordable home.

A total of approximately $200,000 in Affordable Housing Trust Funds is available to distribute to applicants for projects meeting the priorities of the AHTF policies as defined by resolution 2008-34, and which are consistent with the City of Ashland 5-Year Consolidated Plan priorities as well as priorities identified by the City Council at their regular meeting on December 2, 2025 . The applications received are included as attachments to this Council Communication.

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.
- Is the activity a prioritized activity as identified by the City Council.

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.

Resolution 2008-34 also states that proposed activities should meet a priority identified within the City of Ashland's 5-Year Consolidated Plan. Consolidated Plan priorities are given a priority ranking of High, Medium, or Low. Those priorities are shown in the table.

ation	Proposed Project	AHTF Funds Requested	Resolution 2008-34 Preferences	City Council Identified Priority	City Council Vision Values
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 affordabi including available hc and childcare. Belonging through m respect and opennes inclusion and equity Quality of life that un the City's economic v
e Housing ative-Attainable Project	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 affordabi including available hc and childcare. Belonging through m respect and opennes inclusion and equity Quality of life that un the City's economic v
e Housing ative	Capacity Building to establish and facilitate a program that engages the homeowners, students and the Faith Community in the mission driven development of affordable housing.	$51,460	**4.1i**-Sponsored by non-profit organization.	Capacity Building	Community affordabi including available hc and childcare. Belonging through m respect and opennes inclusion and equity Quality of life that un the City's economic v
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 affordabi including available hc and childcare. Belonging through m respect and opennes inclusion and equity Quality of life that un the City's economic v

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 8 units as affordable to a population with a documented need.
- The project addresses long-term affordability (30 years).
- The project is a for-profit development with privately provided affordable housing, with management services to be provided by ACCESS Inc.
- 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.

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.

ADVISORY COMMITTEE AND STAFF RECOMMENDATIONS

The Housing and Human Services Advisory Committee reviewed the applications and made a funding recommendation at their regular meeting on March 26th. The Housing and Human Services Advisory Commission Recommendations differs slightly from the Staff's recommendation.

HOUSING AND HUMAN SERVICES ADVISORY COMMITTEE RECOMMENDATIONS

Werthaiser/Hauser m/s to forward a recommendation to City Council to allocate Affordable Housing Trust Fund as follows:

- Sunstone Housing Collaborative-Ashland Attainable Housing Project-$25,000
- Sunstone Capacity Building-$25,000
- Trusted Homes-$75,000
- Bentella, LLC-$75,000

The HHSAC made a further recommendation that if Trusted Homes did not receive an award from the Oregon Housing and Community Services LIFT program, then their allocation be reduced by $50,000 and the balance be redistributed equally to the Sunstone Ashland Attainable Housing Project, and Bentella, LLC.

The HHSAC did not have the opportunity to revisit their recommendations since learning about the LIFT funding outcomes for the April funding cycle. As the LIFT funding decision did not have a clear outcome as anticipated with the initial funding recommendation, HHSAC did not have a funding recommendation that addresses the potential for delayed funding.

STAFF RECOMMENDATIONS

City staff reviewed the applications and made a funding recommendation which is detailed in the attached Staff Evaluation memo.

- **Bentella LLC: $75,000** in Affordable Housing Trust Fund assistance to partially offset approximately $88,000 in System Development Charges otherwise due for the affordable units.
- **Sunstone Housing Collaborative- Attainable Housing Project: $25,000** to support advancement of the ORCA submission and associated predevelopment coordination.
- **Trusted Homes-$75,000** in Affordable Housing Trust Fund assistance.
- **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

Trusted Homes' AHTF application proposed a timeline for activities that was dependent upon a grant award from a State of Oregon Program that provides funding for the development of housing for homeownership, called Local Innovation and Fast Track, (LIFT) funding. The HHSAC conditioned Trusted Homes award recommendation upon Trusted Homes receiving that funding in the most recent Cycle which ended in early April. However, Trusted Homes did not receive a funding award in the Spring award cycle but was instead placed on a waitlist for funding.

City Staff reached out to Oregon Housing and Community Services (OHCS) LIFT program staff to better understand the implications of Trusted Homes being placed on the waitlist, including the likelihood and timing of potential funding in the upcoming cycle. The City received a highly favorable response, indicating that Trusted Homes' placement on the waitlist was not due to any deficiency in the application, but rather the timing of submission under a first come, first served process. OHCS further noted that Trusted Homes scored among the highest of all applicants and would likely have been funded absent that timing issue, and that the project has a strong likelihood of receiving funding in the next cycle concluding in late September. Based on this feedback,

Staff recommends allowing Trusted Homes to continue pursuing funding through future LIFT cycles, as the correspondence demonstrates a credible and near term path to securing the necessary financing. The communication from OHCS is included as an attachment to this memo for reference.

City staff will return to Council at the May 19 regular business meeting with a request to modify the timeline associated with the prior Council award to Trusted Homes for disposition of the six lots in the Beach Creek Subdivision. The original award was contingent on securing State funding in the Spring LIFT cycle, and staff is recommending the timeline be extended to allow Trusted Homes to pursue subsequent LIFT funding applications, including the September 2026 cycle and, if necessary, a future April cycle.

FISCAL IMPACTS

The allocation of Affordable Housing Trust Fund (AHTF) grants by the City of Ashland is pre-budgeted and designed specifically for affordable housing projects. Thus, the distribution of these funds, as per the recommendations made for the 2026 AHTF awards, incurs no additional fiscal impact on the city. The grants are distributed within the confines of an already established budget, ensuring the city's commitment to affordable housing is fulfilled without exceeding planned expenditures. Any funding left unallocated may be awarded in a future AHTF award process.

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

Should the Council wish to follow the Housing and Human Services Advisory Committee's recommendation the following motion is presented:

I move to award the 2026 Affordable Housing Trust funds as follows:

- Sunstone Ashland Attainable Housing Project-$25,000
- Sunstone Capacity Building-$25,000
- Trusted Homes-$75,000
- Bentella, LLC-$75,000

Based on the current information regarding a LIFT funding award, staff recommends that the Council not place any contingencies on the funding award to Trusted Homes at this time.

Should the Council decide to follow the recommendation put forward by Staff.

I move to award the 2026 Affordable Housing Trust funds as follows:

- Sunstone Ashland Attainable Housing Project-$25,000
- Trusted Homes-$75,000
- Bentella, LLC-$75,000

REFERENCES & ATTACHMENTS

1. 032626_ Staff_Eval_AHTF_2026
2. AHTF Applications
3. Res_2008-034_AHTF_Policies
4. OHCS LIFT Correspondance

CITY OF ASHLAND

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 21, 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

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 dead 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.

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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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 DEVELOPMENT

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

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

Project Overview

Subdivision

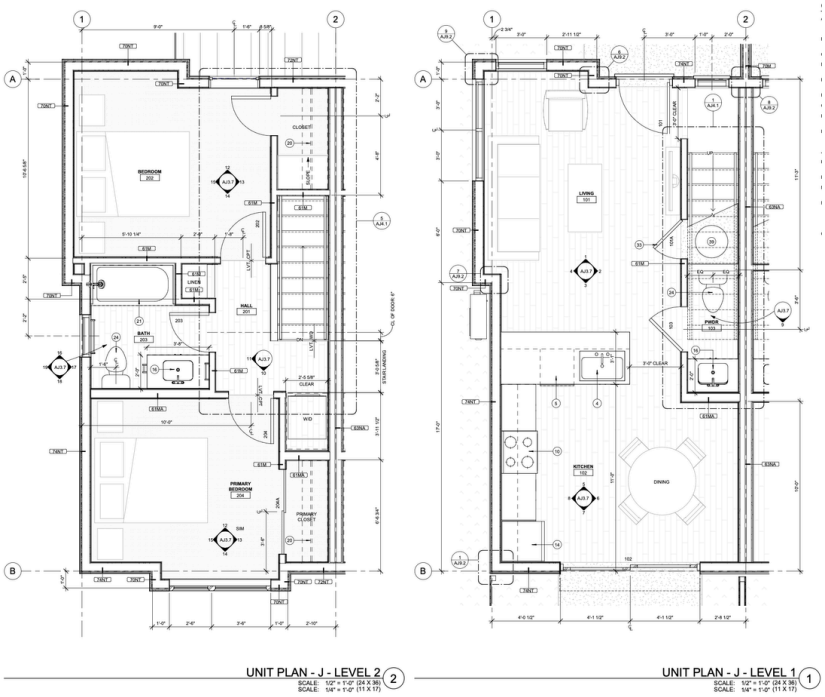
The approved subdivision at 300 Clay Street consists of a comprehensive residential development of 29 lots. This includes four, four-plex buildings (16 total units), along with twenty-one single-family residential lots, internal public streets, utilities, stormwater facilities, and open space. Two of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

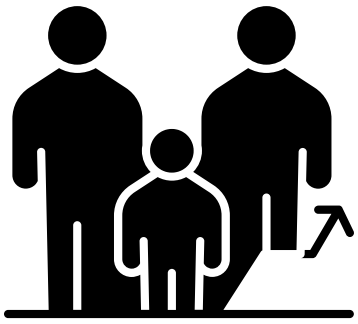
Community Partnerships

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
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TEL.: 541.488.8200

CONSTRUCTION DOCUMENTS

CALDERA OAKS: BUILDING J

BENTELLA LLC
300 CLAY ST.
ASHLAND OR. 97520

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AREA OF MULTI-FAMILY DEVELOPMENT:
21,120 SF

PRIVATE OPEN SPACE (REAR YARDS AND PATIO):
4,790 SF

PRIVATE OPEN SPACE (AREA BETWEEN BUILDINGS):
2,135 SF

TOTAL PRIVATE OPEN SPACE:
6,925 SF

SITE - PLAN 1

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

SCALE: 1" = 30'

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

ZONING INFORMATION

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

LEGEND - SITE PLAN

ASPHALT
CONCRETE
LANDSCAPE

AUTOMOBILE PARKING

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

SITE AREA

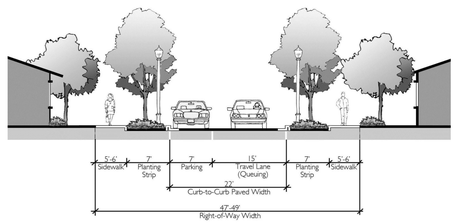
SITE AREA = 209,088 SF

OPEN SPACE

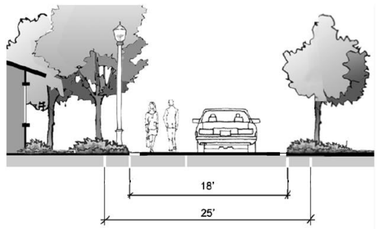
	2,934 SF
	1,414 SF
	3,782 SF
	7,972 SF
TOTAL	16,102 SF

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

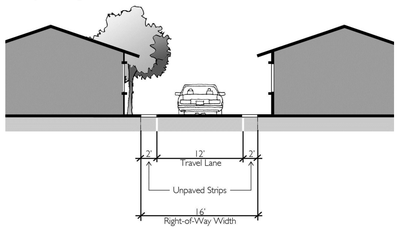
Neighborhood Street - Figure 18.4.6.040.G.4.b



Shared Street - Figure 18.4.6.040.G.8



Alley - Figure 18.4.6.040.G.6



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

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95% CD

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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

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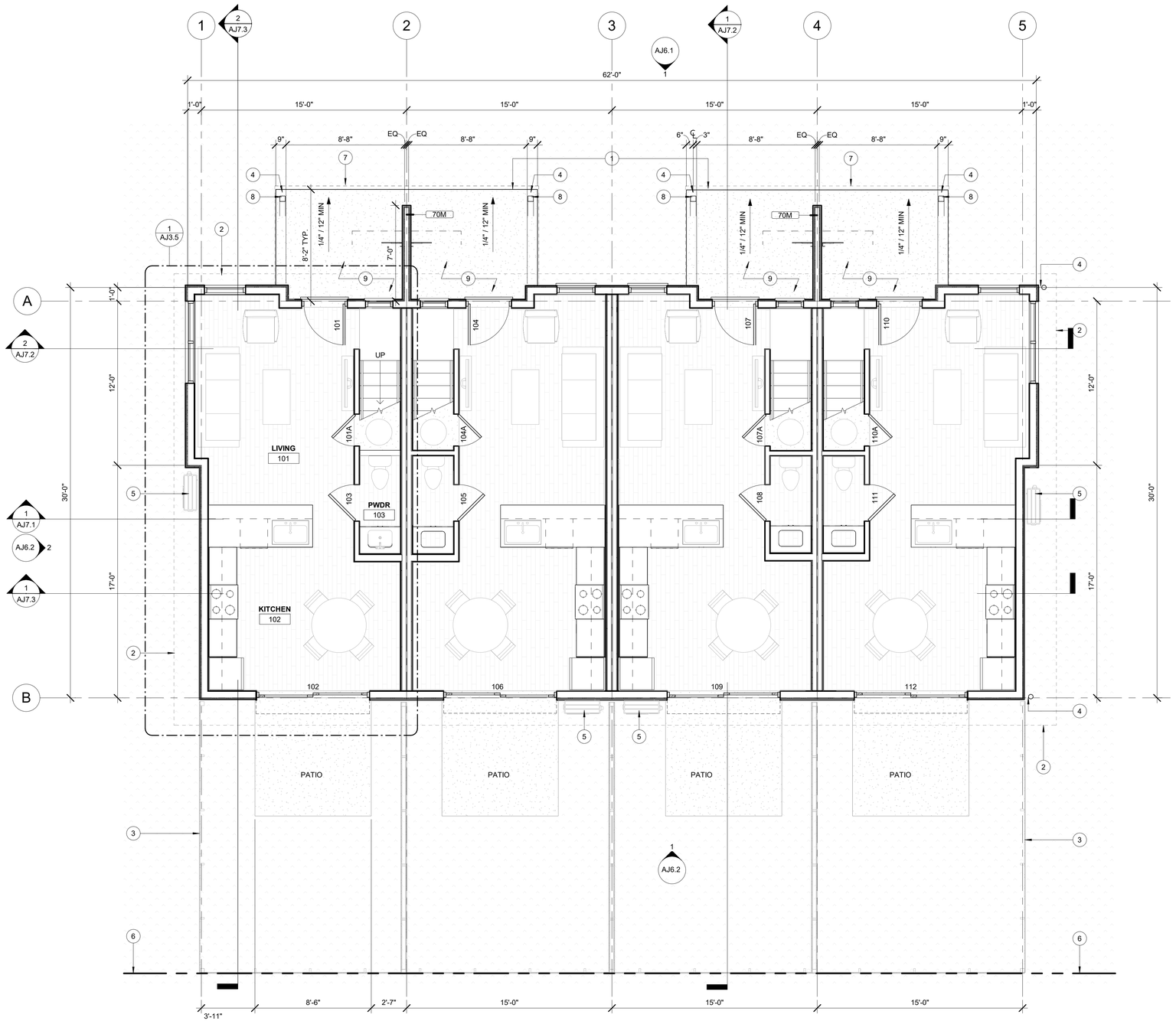

PLAN - LEVEL 1

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.

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

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.

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CONSTRUCTION DOCUMENTS

REGISTERED ARCHITECT
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CALDERA OAKS: BUILDING J

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PLAN - LEVEL 1

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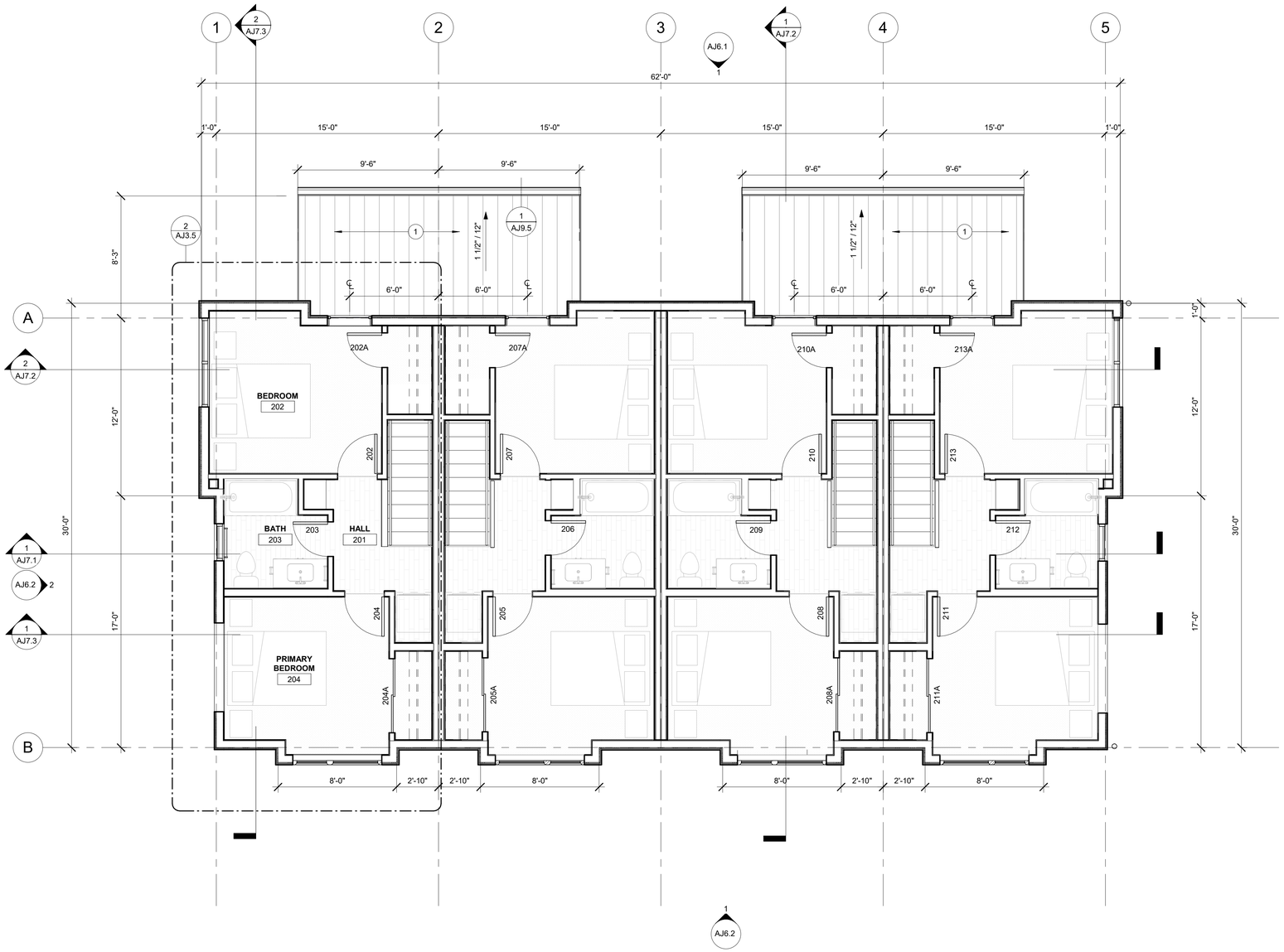

PLAN - LEVEL 2

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

1

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PLAN - LEVEL 2

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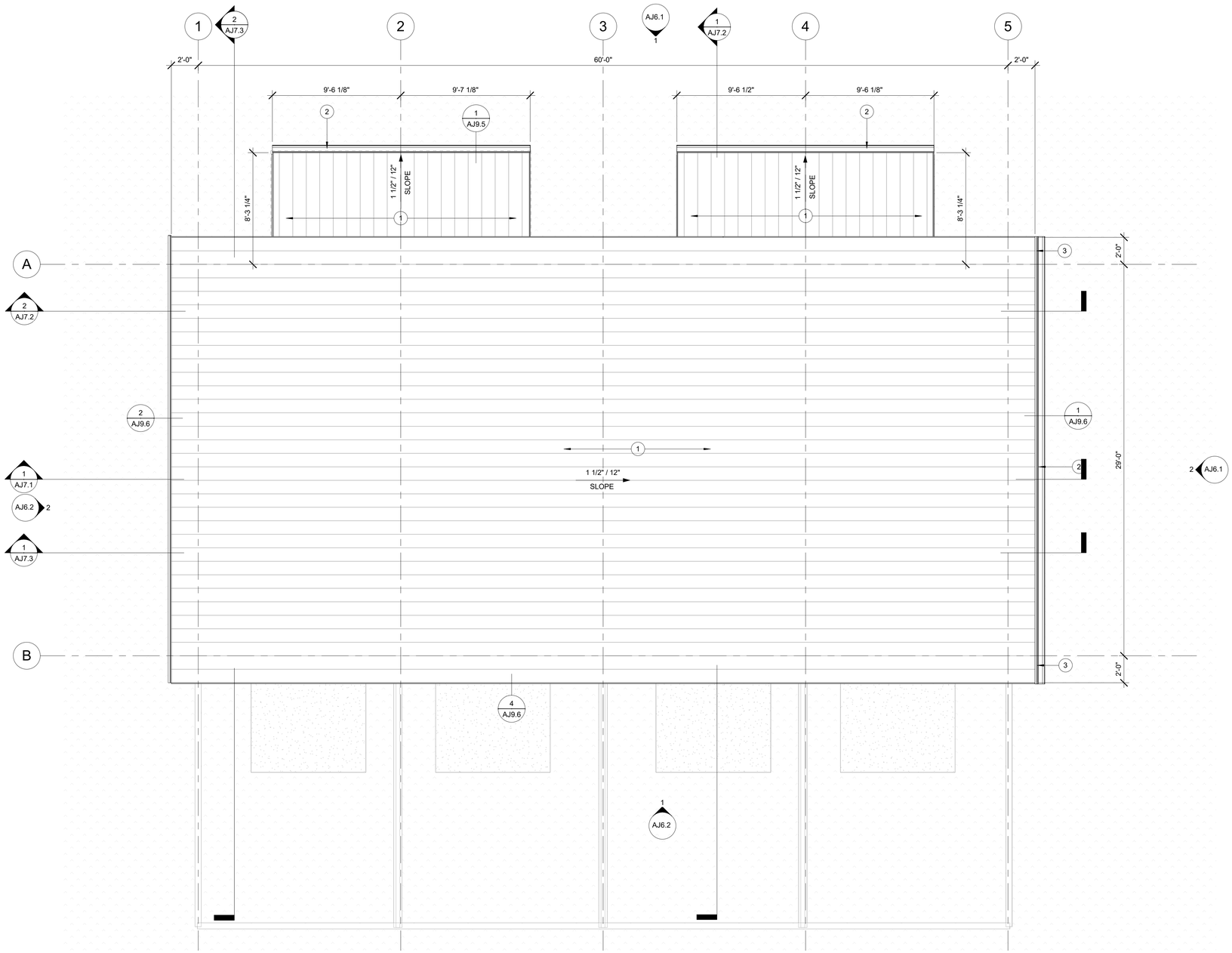

PLAN - ROOF 1

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

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ROOF PLAN

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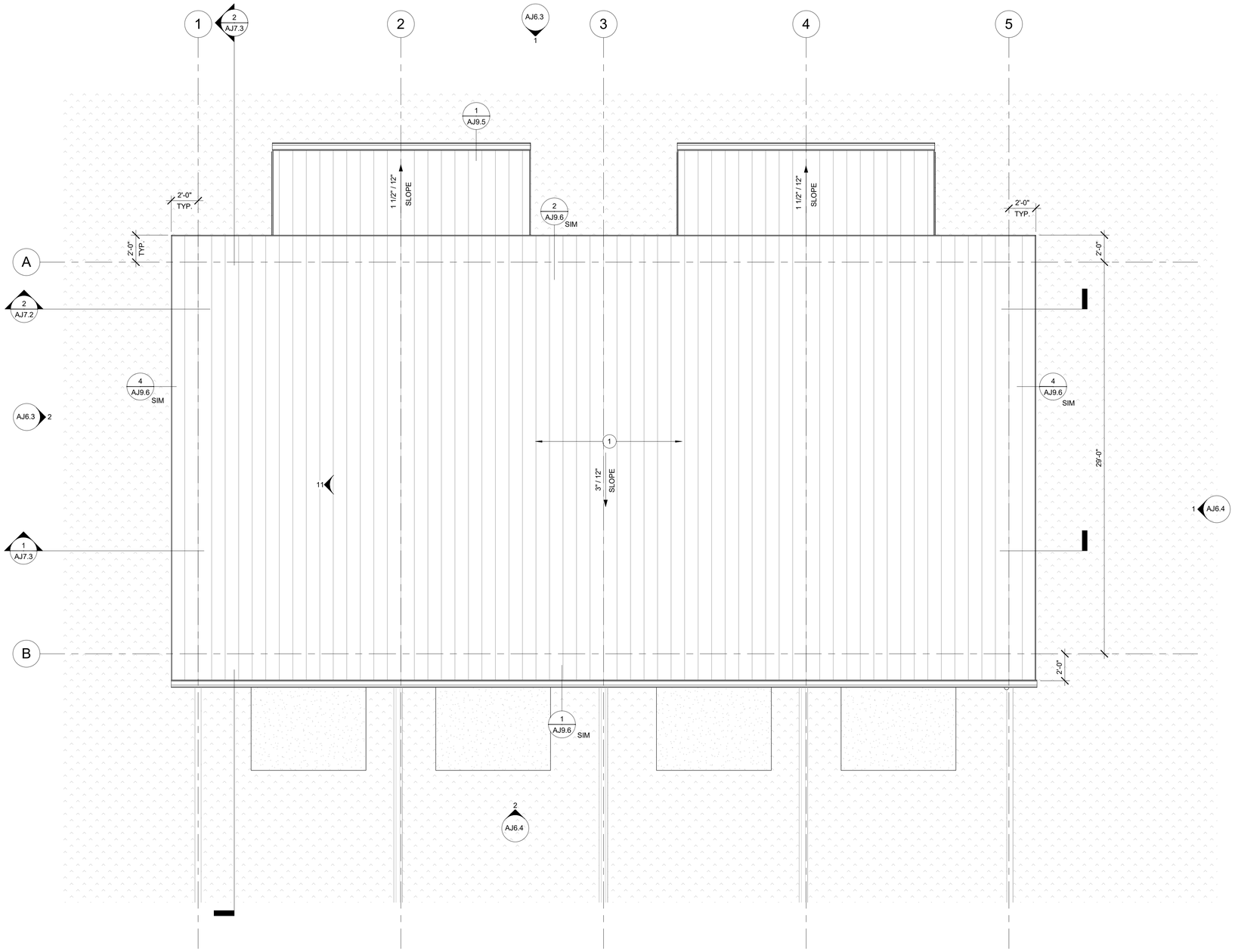

PLAN - ROOF - LOT 25

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

1

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).

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KEYNOTES - ROOF PLAN

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

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ROOF PLAN - LOT 25

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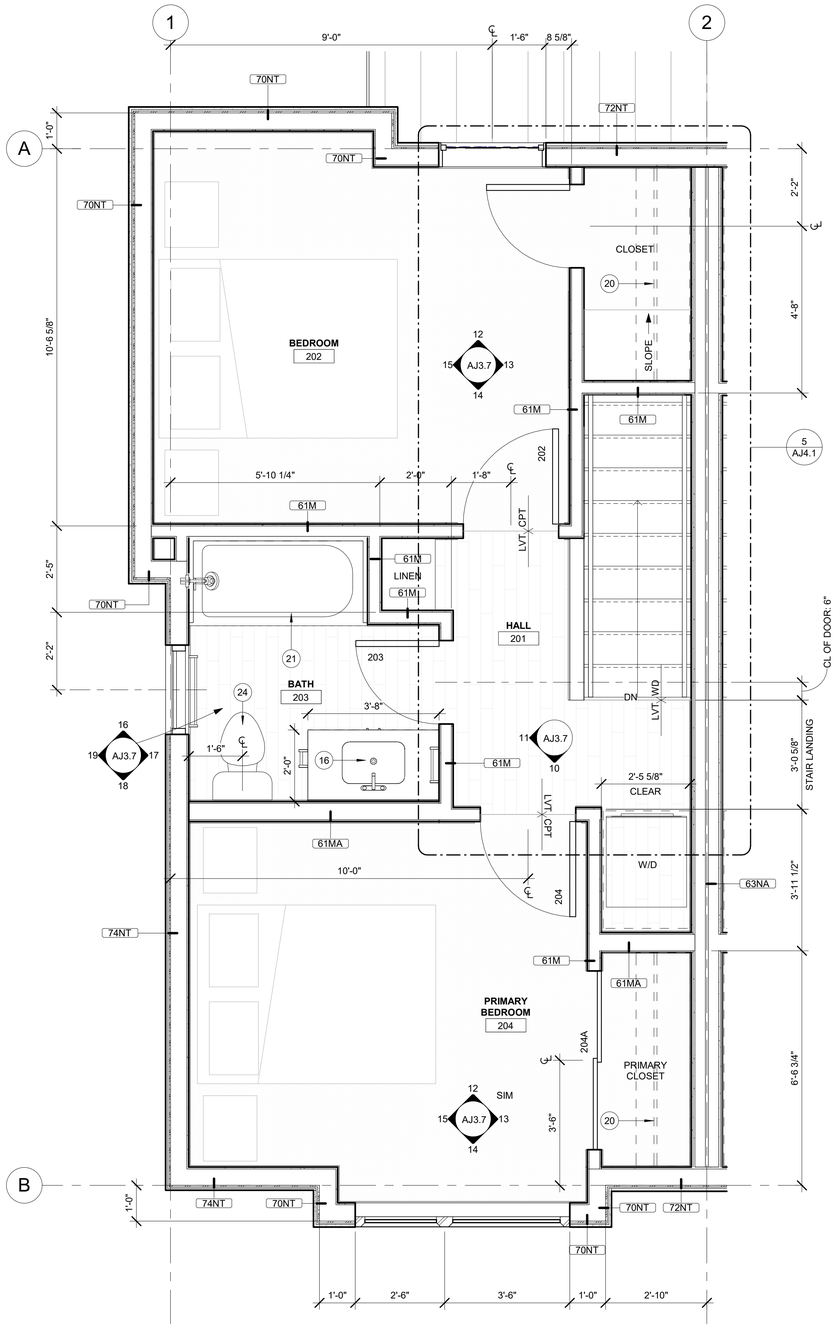
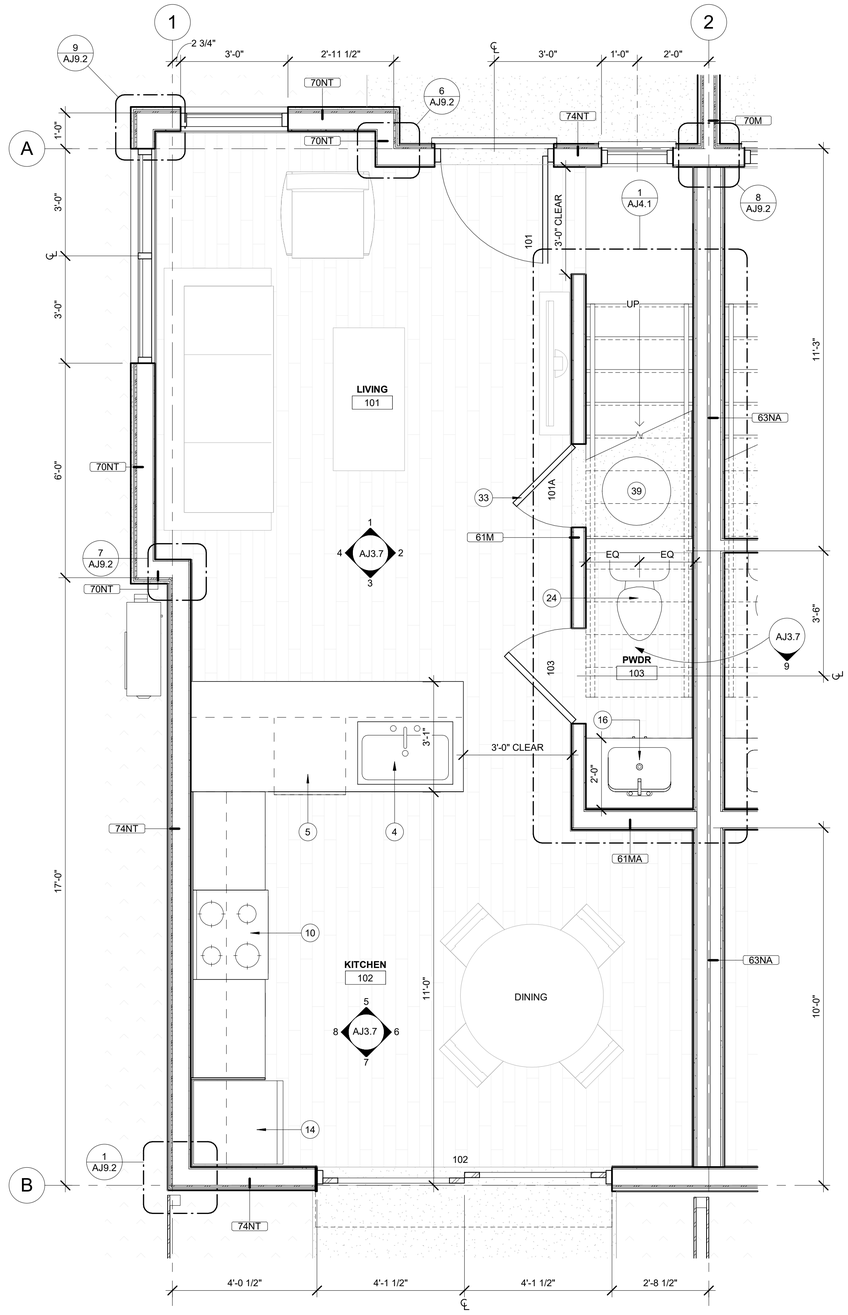


UNIT PLAN - J - LEVEL 2

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

2



UNIT PLAN - J - LEVEL 1

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

1

GENERAL NOTES - UNIT COMPOSITE

A. 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.

B. SEE GENERAL SHEETS FOR ADDITIONAL ACCESSIBILITY INFORMATION IF APPLICABLE.

C. SEE AJ1.1 FOR ASSEMBLIES AND DIMENSION SET POINTS.

D. GRIDS ARE FOR REFERENCE ONLY. CONTRACTOR TO SET CONTROL POINTS FOR LAYOUT.

E. REFERENCE SHEET AJ12.5 FOR DETAILS OF TRANSITIONS BETWEEN FLOORING MATERIALS.

F. FURNITURE, FIXTURES, AND EQUIPMENT SHOWN FOR REFERENCE ONLY.

G. REFERENCE SHEET AJ11.1 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.

J. CASEWORK FABRICATION TO BE COORDINATED WITH APPLIANCES.

K. CENTER LIGHT FIXTURES, J BOXES, AND SPRINKLER HEADS ON CEILING/ SOFFIT, U.N.O.

L. ALL CEILING HEIGHTS ARE RELATIVE TO FINISHED FLOOR, U.N.O.

M. ACCESS PANEL LOCATIONS SHALL BE COORDINATED WITH THE ARCHITECT.

N. 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.

O. 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

1

1 ALIGN
2 06 41 00 - PLASTIC LAMINATE CASEWORK (PLAM-2)
3 KITCHEN FAUCET (PF-10)
4 KITCHEN SINK (PF-11)
5 DISHWASHER (APP-9)
6 06 20 00 PAINTED WALL BASE (B-1)
7 09 21 16 PAINTED GYPSUM WALL BOARD (PT-1)
8 09 30 00 TILE BACKSPLASH (T-4)
9 10 28 00 - FRAMELESS MIRROR (ACC-6)
10 OVEN (APP-8)
11 12 36 00 QUARTZ COUNTERTOP (SURF-3)
12 26 00 00 - WALL-MOUNTED LIGHT, CENTER ABOVE VANITY CABINET
13 MICROWAVE VENT HOOD (APP-10)
14 REFRIGERATOR (APP-7)
15 22 42 00 BATHROOM FAUCET PF-12)
16 22 42 00 UNDERMOUNT BATHROOM SINK (PF-4)
17 12 36 00 QUARTZ COUNTERTOP (SURF-4)
18 12 36 00 QUARTZ BACKSPLASH (SURF-4)
19 WASHER (APP-11)
20 DOUBLE CLOSET ROD AND SHELF.
21 22 42 00 TUB / SHOWER SURROUND (PF-13)
22 22 42 00 TUB / SHOWER TRIM KIT (PF-8)
23 10 28 00 - HAND TOWEL BAR, PROVIDE BLOCKING (ACC-3)
24 22 42 00 TOILET (PF-5)
26 06 41 00 BUILT IN SHELVING, PROVIDE BLOCKING (PLAM-1)
28 06 41 00 - PLASTIC LAMINATE CASEWORK UPPERS (PLAM-3)
29 06 41 00 - PLASTIC LAMINATE CASEWORK FRIDGE SURROUND (PLAM-2)
30 06 41 00 - PLASTIC LAMINATE CASEWORK END PANEL (PLAM-2)
31 DECORATIVE WALL SCONCE (L-7)
32 DECORATIVE PENDANT (L-6)
33 ACCESS DOOR: 2'-4" X 4'-0", TYP.
34 HVAC MINI-SPLIT INTERIOR SUPPLY UNIT
35 VAULTED CEILING @ B.O.S. - ADD ALT. DEDUCT: FLAT HARD LID CEILING TO MATCH OTHERS, TYP AT ALL TYPE J UNITS.
36 07 46 23 - 6" T&G ACETYLATED WOOD SOFFIT, MILL STAINED & FIELD COATED (WD-1)
37 PROVIDE BLOCKING FOR GRAB BAR INSTALLATION
38 10 28 00 - TOWEL BAR, PROVIDE BLOCKING, (ACC-2)
39 WATER HEATER
40 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
41 10 28 00 - TOILET TISSUE HOLDER, PROVIDE BLOCKING, (ACC-4)
42 07 46 46 - FIBER CEMENT SOFFIT PANELS, Ppainted (FC-1)
43 07 46 23 - 2" CONTINUOUS SOFFIT VENT (TAMLYN VPCA2-BK), BLACK FINISH

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UNIT COMPOSITE - UNIT J FLOOR PLANS

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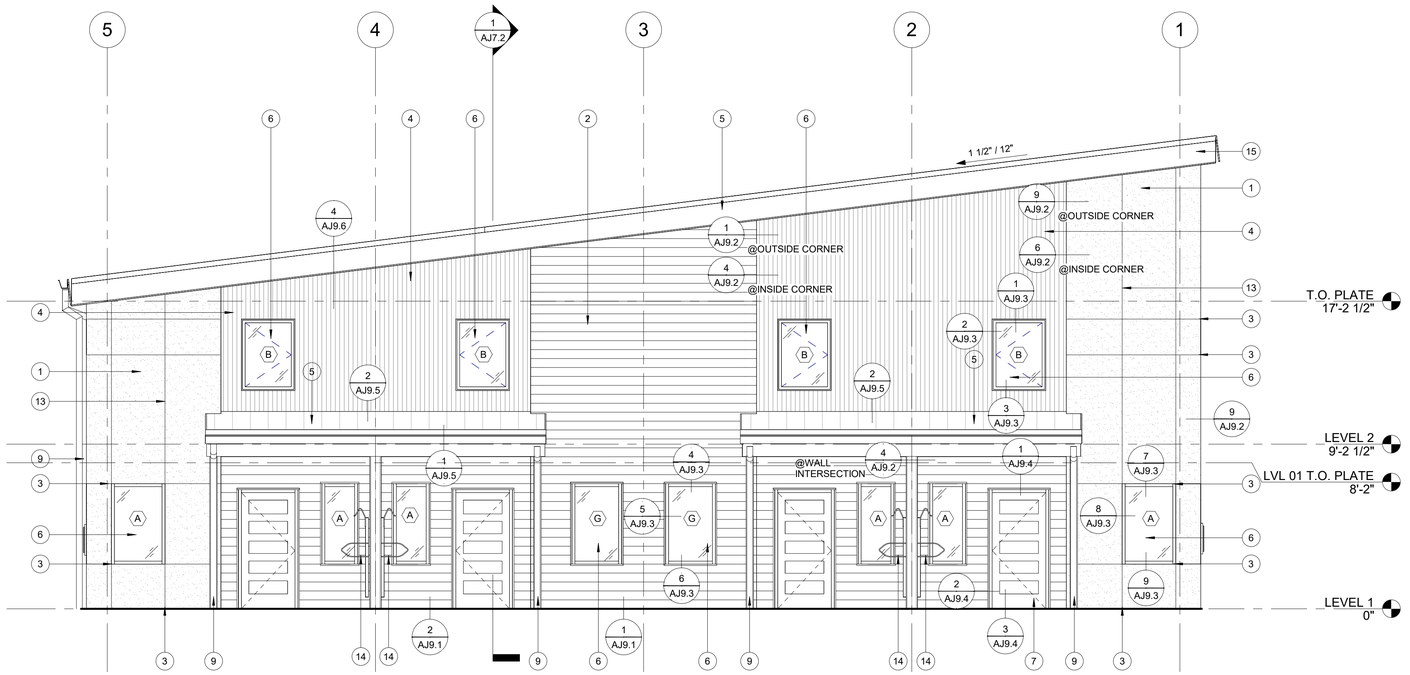
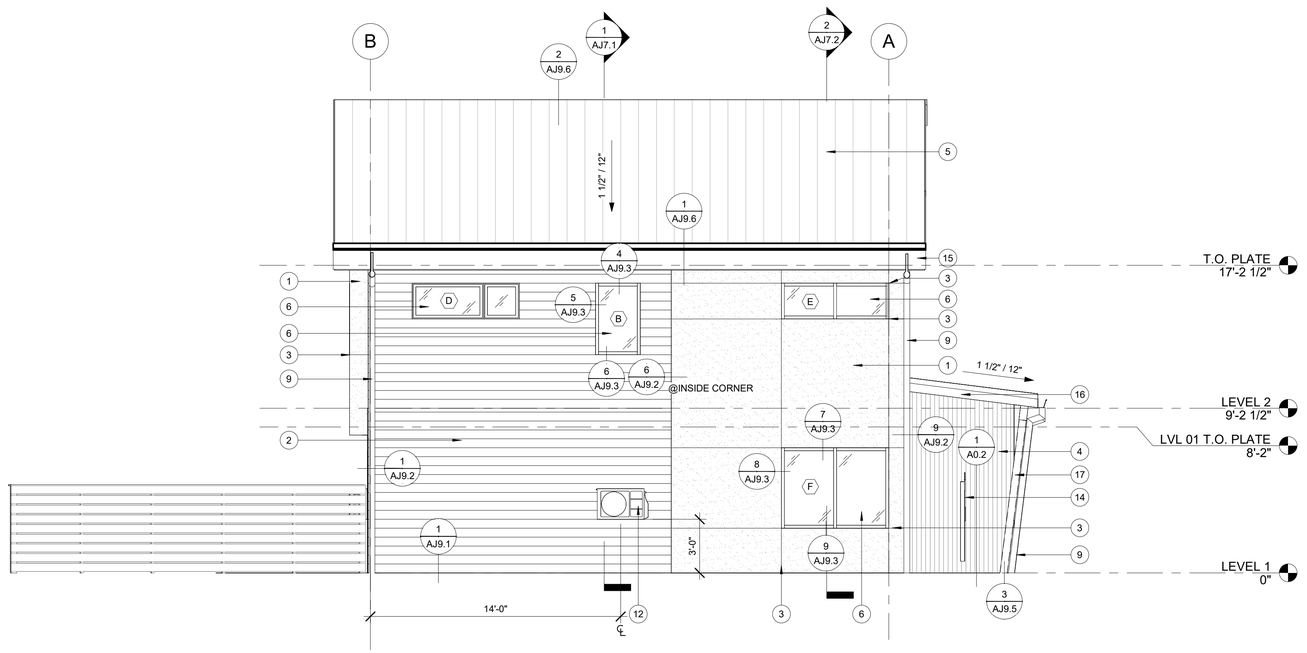


EXTERIOR ELEVATION - EAST (1)

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



EXTERIOR ELEVATION - SOUTH (2)

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

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 RECCOMENDATION.
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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CALDERA OAKS: BUILDING J

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REVISIONS

EXTERIOR ELEVATIONS

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

AJ6.1

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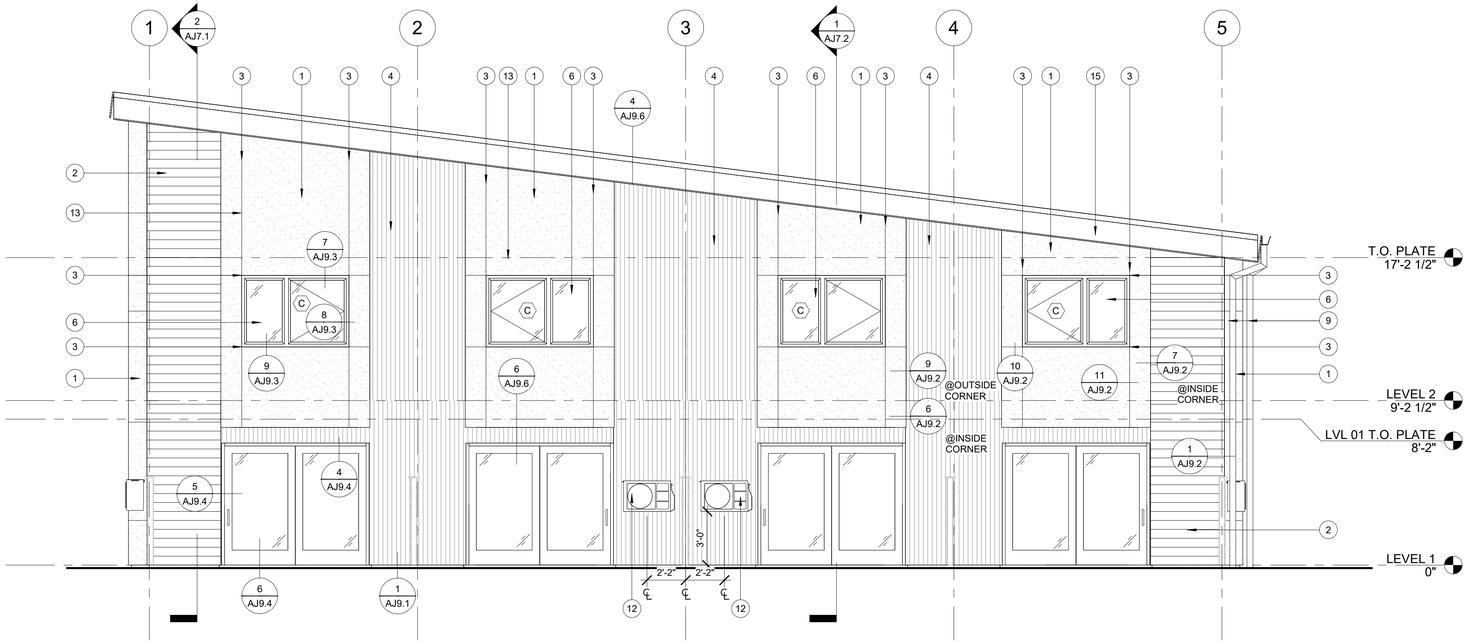
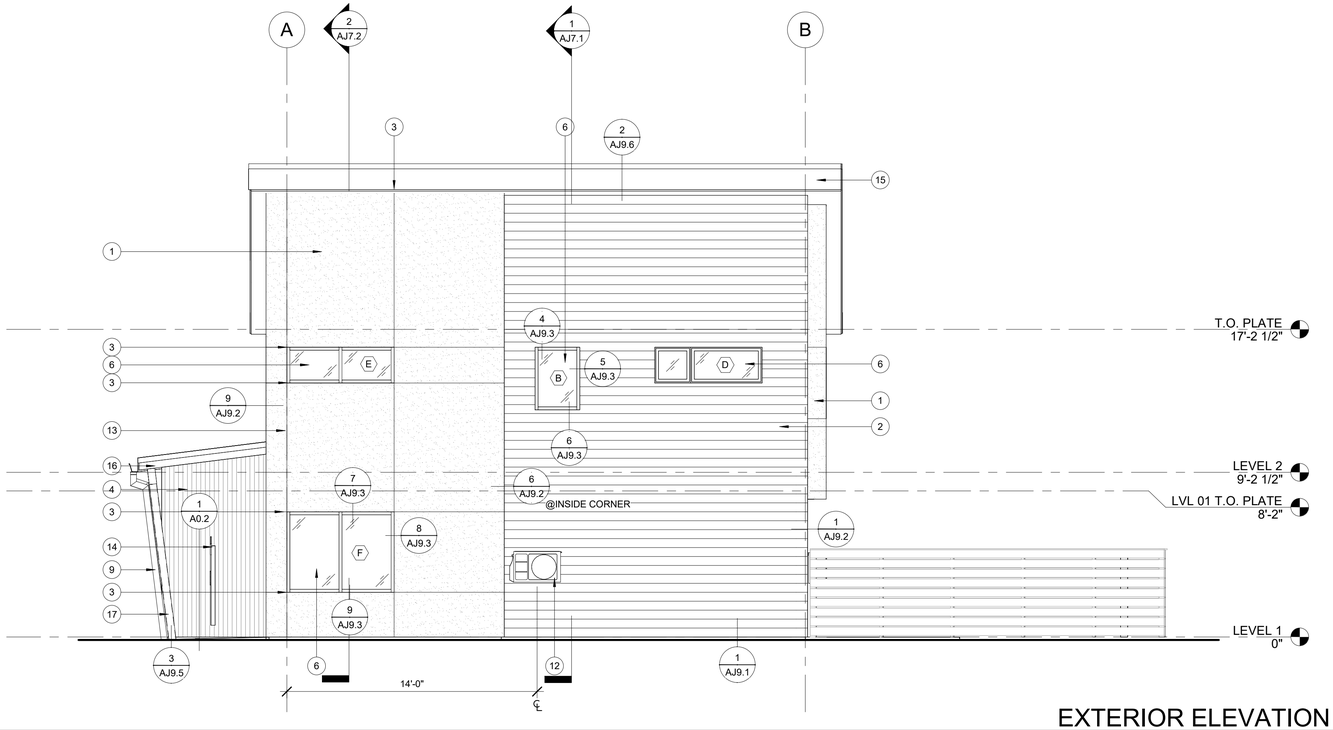


EXTERIOR ELEVATION - WEST (1)

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



EXTERIOR ELEVATION - NORTH (2)

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

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.

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REVISIONS

EXTERIOR ELEVATIONS

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
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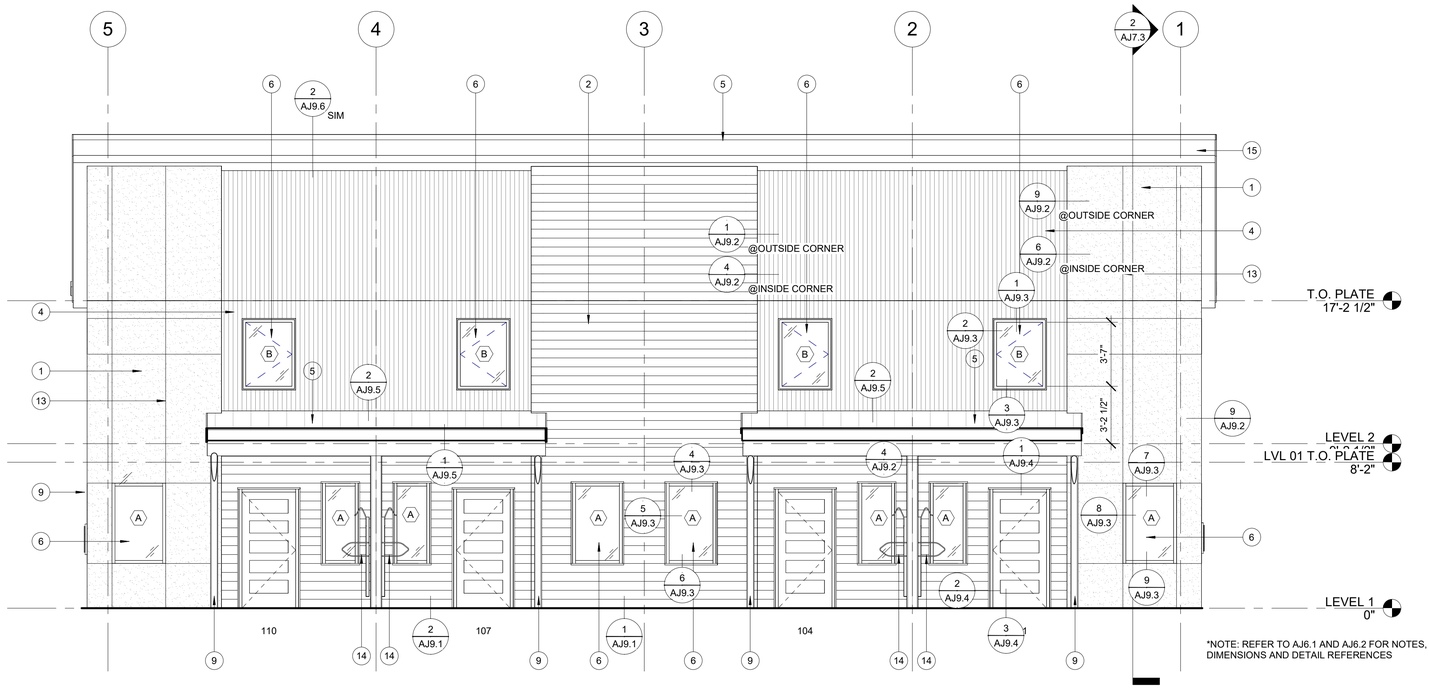
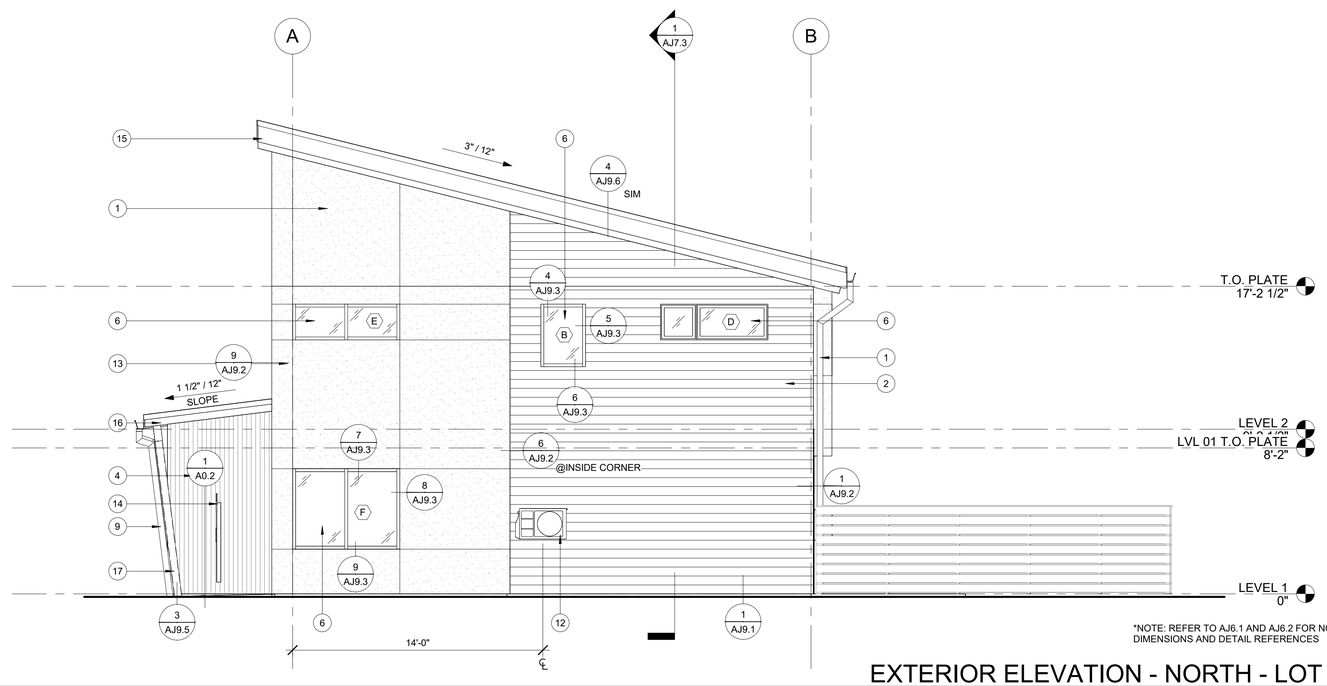


*NOTE: REFER TO AJ6.1 AND AJ6.2 FOR NOTES, DIMENSIONS AND DETAIL REFERENCES

EXTERIOR ELEVATION - EAST - LOT 25 (1)

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



*NOTE: REFER TO AJ6.1 AND AJ6.2 FOR NOTES, DIMENSIONS AND DETAIL REFERENCES

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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EXTERIOR ELEVATIONS - LOT 25

PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
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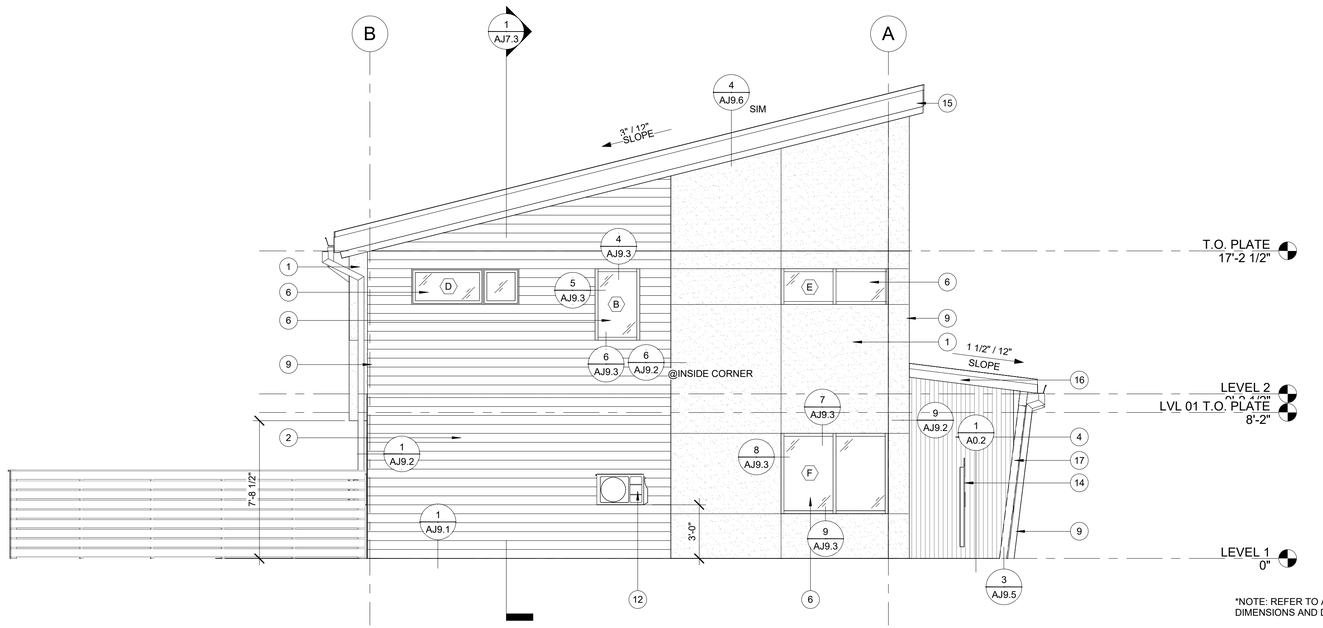
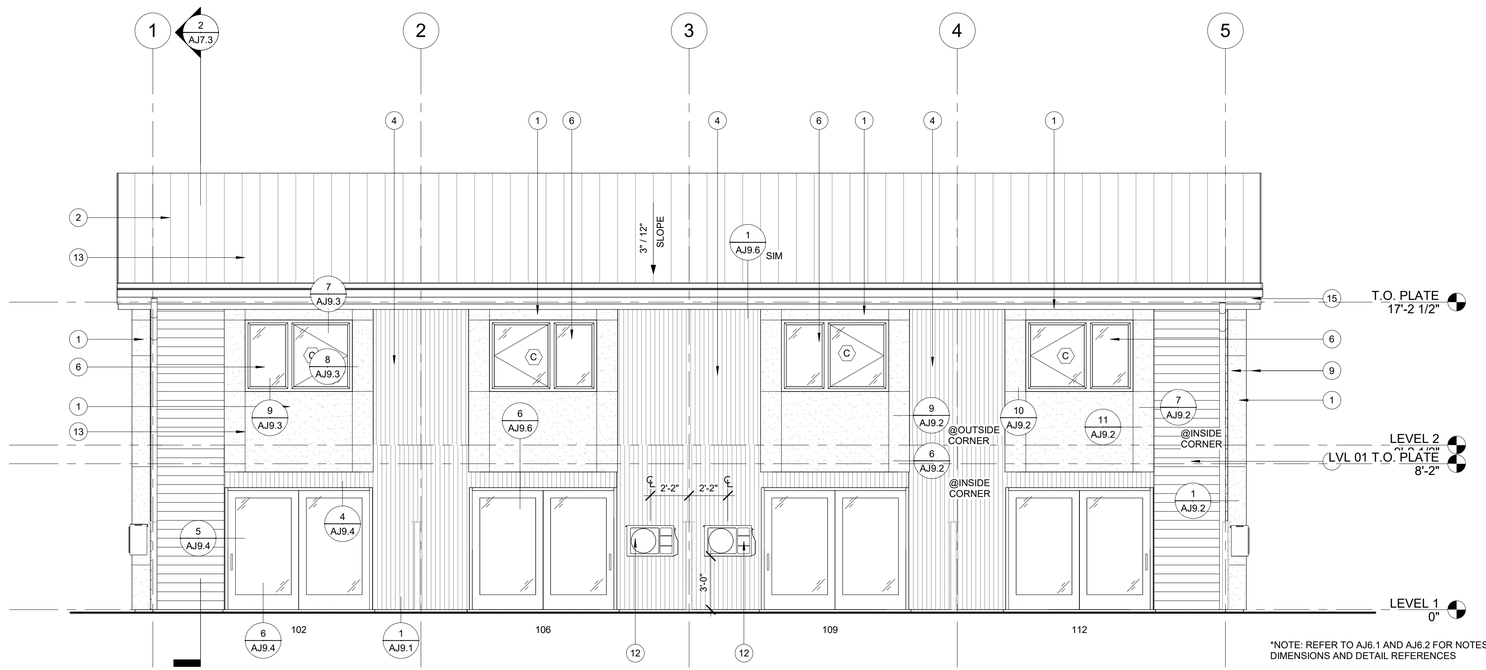


*NOTE: REFER TO AJ6.1 AND AJ6.2 FOR NOTES, DIMENSIONS AND DETAIL REFERENCES

EXTERIOR ELEVATION - SOUTH - LOT 25 (1)

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



*NOTE: REFER TO AJ6.1 AND AJ6.2 FOR NOTES, DIMENSIONS AND DETAIL REFERENCES

EXTERIOR ELEVATION - WEST - LOT 25 (2)

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

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EXTERIOR ELEVATIONS - LOT 25

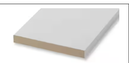
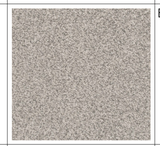
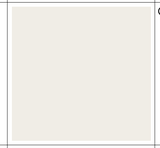
PROJECT NO.: 25-010
ISSUE DATE: 07.08.2025
SHEET:

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	GWB	PT-1 / T-4	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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REVISIONS

FINISH SCHEDULE

PROJECT NO.: 25-010
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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 H20 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 RF18A5101SR/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:

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

SCALE: 1" = 30'-0"
0' 15' 30' 60' 90'

TERRAIN
LANDSCAPE ARCHITECTURE
310 Oak Street, Suite 3
Ashland, Oregon 97520
541.500.4776
TERRAINARCH.COM

CALDERA OAKS SUBDIVISION
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ASHLAND, OR 97520

REGISTERED LANDSCAPE ARCHITECT
REG. # 0596
Piper von Chamier
OREGON
03/11/2004

REVISIONS

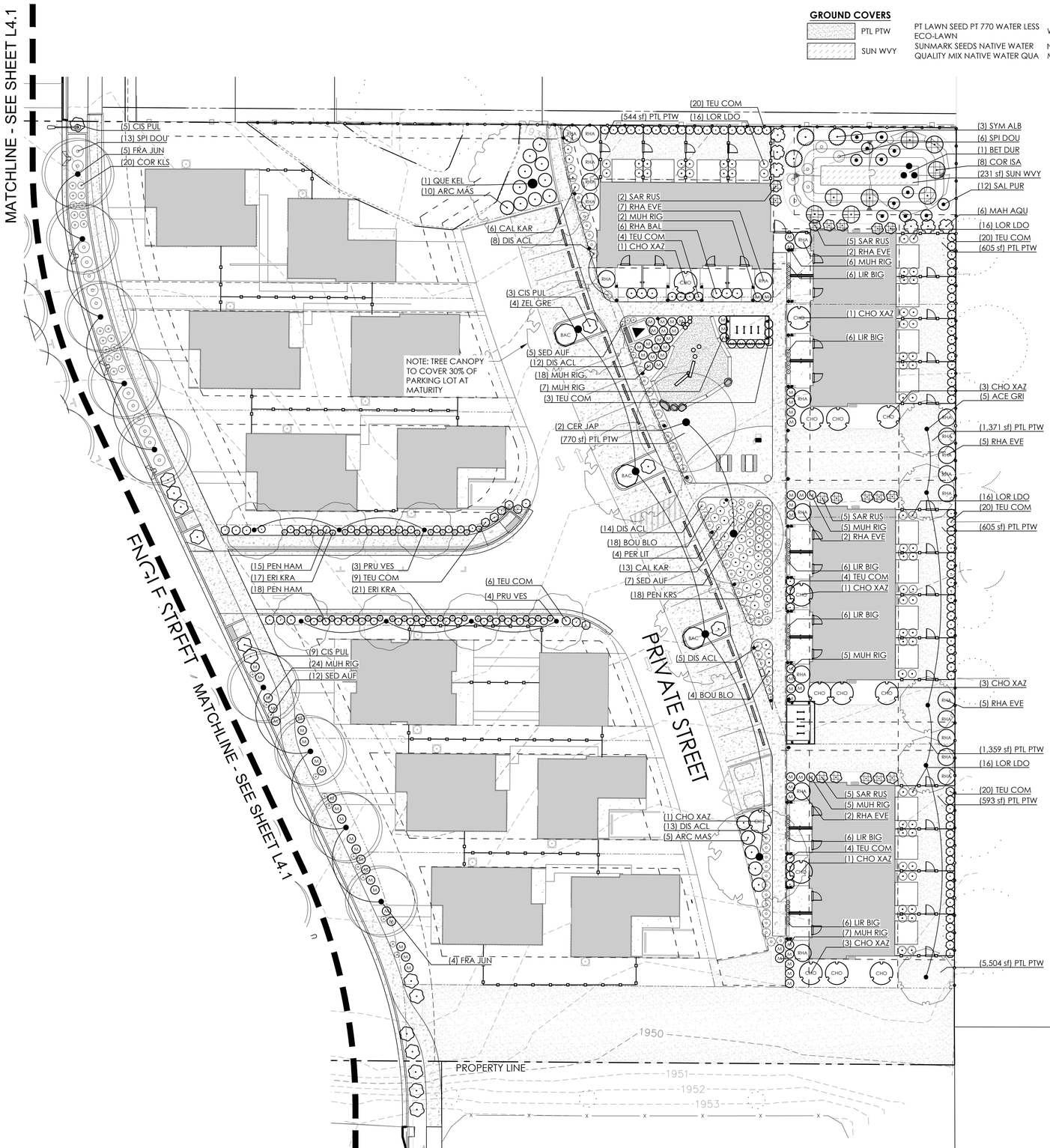
#	DATE	DESCRIPTION
-		
-		
-		
-		
-		

PERMIT SET

OVERALL SITE PLAN

L1.0

PROJECT NO. 2516
07.03.2025
TEAM: SB, EG



1 LANDSCAPE PLANTING PLAN
Scale: 1" = 20'-0" (34x22 SHEET SIZE)

PLANT SCHEDULE

SYMBOL	CODE	BOTANICAL NAME	COMMON NAME
TREES			
	ACE GRI	ACER GRISEUM	PAPERBARK MAPLE
	BET DUR	BETULA NIGRA `BNMTF`	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	GLEDITSIA 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
SYMBOL	**CODE**	**BOTANICAL NAME**	**COMMON NAME**
SHRUBS			
	ARC MAS	ARCTOSTAPHYLOS UVA-URSI `MASSACHUSETTS`	MASSACHUSETTS KINNIKINNICK
BAC	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	CHO XAZ	CHOISYA X DEWITTEANA 'AZTEC PEARL'	AZTEC PEARL MEXICAN ORANGE
CIS	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 'KELSEYI'	KELSEY'S DWARF RED TWIG DOGWOOD
	DIS ACL	DISTYLIUM X 'PIIDIST-II'	BLUE CASCADE® DISTYLIUM
	ERI KRA	ERICA X DARLEYENSIS `KRAMER`S ROTE`	KRAMERS 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
M	MUH RIG	MUHLENBERGIA RIGENS	DEER GRASS
	NEP RAC	NEPETA RACEMOSA 'WALKER'S LOW'	WALKER'S LOW CATMINT
	PEN HAM	PENNISETUM ALOPECUROIDES 'HAMELN'	HAMELN FOUNTAIN GRASS
	PEN KRS	PENNISETUM ORIENTALE `KARLEY ROSE`	KARLEY ROSE FOUNTAIN GRASS
	PER LIT	PEROVSKIA ATRIPLICIFOLIA `LITTLE SPIRE`	LITTLE SPIRE RUSSIAN SAGE
RHA	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

TERRAIN
LANDSCAPE ARCHITECTURE
310 Oak Street, Suite 3
Ashland, Oregon 97520
541.500.4776
TERRAINARCH.COM

CALDERA OAKS SUBDIVISION
300 CLAY STREET
ASHLAND, OR 97520

REGISTERED LANDSCAPE ARCHITECT
REG. # 0596
Piper von Chamier
OREGON
03/11/2004

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 'KELSEYI'
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 KINNIKINNIK

BACCHARIS PILULARIS 'PIGEON POINT'
PIGEON POINT COYOTE BRUSH

BOUTELOUA GRACILIS 'BLONDE AMBITION'
BLONDE AMBITION BLUE GRAMA

CALAMAGROSTIS X ACUTIFLORA 'KARL FOERSTER'
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CHOISYA X DEWITTEANA 'AZTEC PEARL'
AZTEC PEARL MEXICAN ORANGE

CISTUS X 'BLANCHE'
WHITE ROCKROSE

CISTUS X PULVERULENTUS 'SUNSET'
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DISTYLIUM 'BLUE CASCADE'
BLUE CASCADE DISTYLIUM

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WHITE PERFECTION DARLEY HEATH

HELICTOTRICHON SEMPERVIRENS
BLUE OAT GRASS

LOROPETALUM 'JAZZ HANDS PINK'
JAZZ HANDS PINK FRINGEFLOWER

MAHONIA AQUIFOLIUM
OREGON GRAPE

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LITTLE SPIRE RUSSIAN SAGE

RHAMNUS CALIFORNICA 'EVE CASE'
EVE CASE COFFEEBERRY

RHAPHIOLEPIS INDICA 'BALLERINA'
BALLERINA INDIAN HAWTHORN

SARCOCOCCA RUSCIFOLIA
FRAGRANT SWEETBOX

SEDUM X 'AUTUMN FIRE'
AUTUMN FIRE STONECROP

TEUCRIUM FRUTICANS 'COMPACTA'
COMPACT BUSH GERMANDER

ECO TURF

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

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Piper von Chamier
OREGON
03/11/2004

REVISIONS

#	DATE	DESCRIPTION
-		
-		
-		
-		
-		

PERMIT SET

PLANT IMAGES

L4.0B

PROJECT NO. 2516
07.03.2025
TEAM: SB, EG

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.

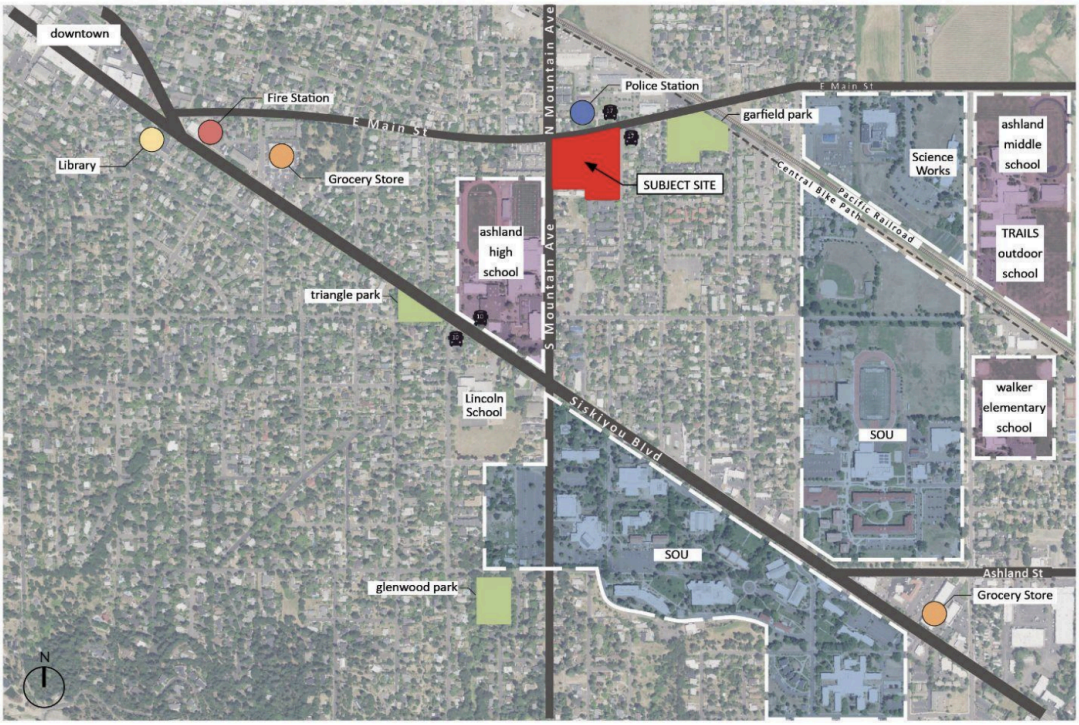
Outcome: A fully complete ORCA Intake package ready for submission to OHCS.
Estimated Completion: March 2026

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.

<u>Working knowledge of the Affordable Housing Development Process:</u>
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.

<u>Coalition-Building Capacity:</u>
Sunstone has demonstrated ability to convene diverse partners such as public agencies, school districts, nonprofits, service providers, and community stakeholders around shared housing goals.

<u>Mission Stewardship:</u>
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.*

4. Sunstone Administrative & Facilitation – $5,500

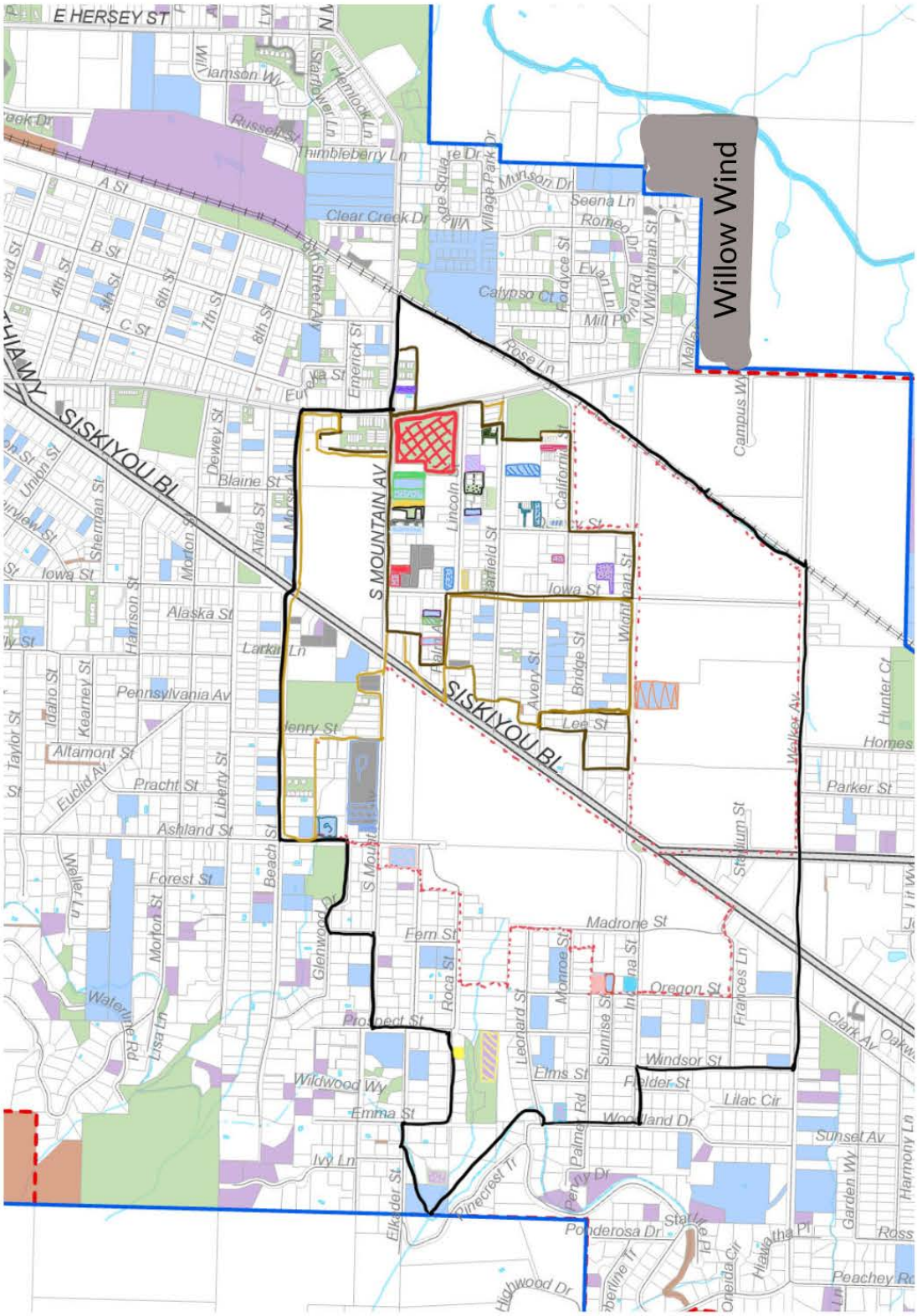
Line Item	Description	Amount
Sunstone Administration	Grant management, coordination meetings, document control, stakeholder facilitation	**$5,500**
Subtotal		**$5,500**

Outcome: *Effective project coordination ensuring timely and accurate ORCA submission.*

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/

Sunstone Housing Collaborative
1467 Siskiyou Blvd #79
Ashland, OR 97520
(541) 210-8675

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 (MHLD) 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.

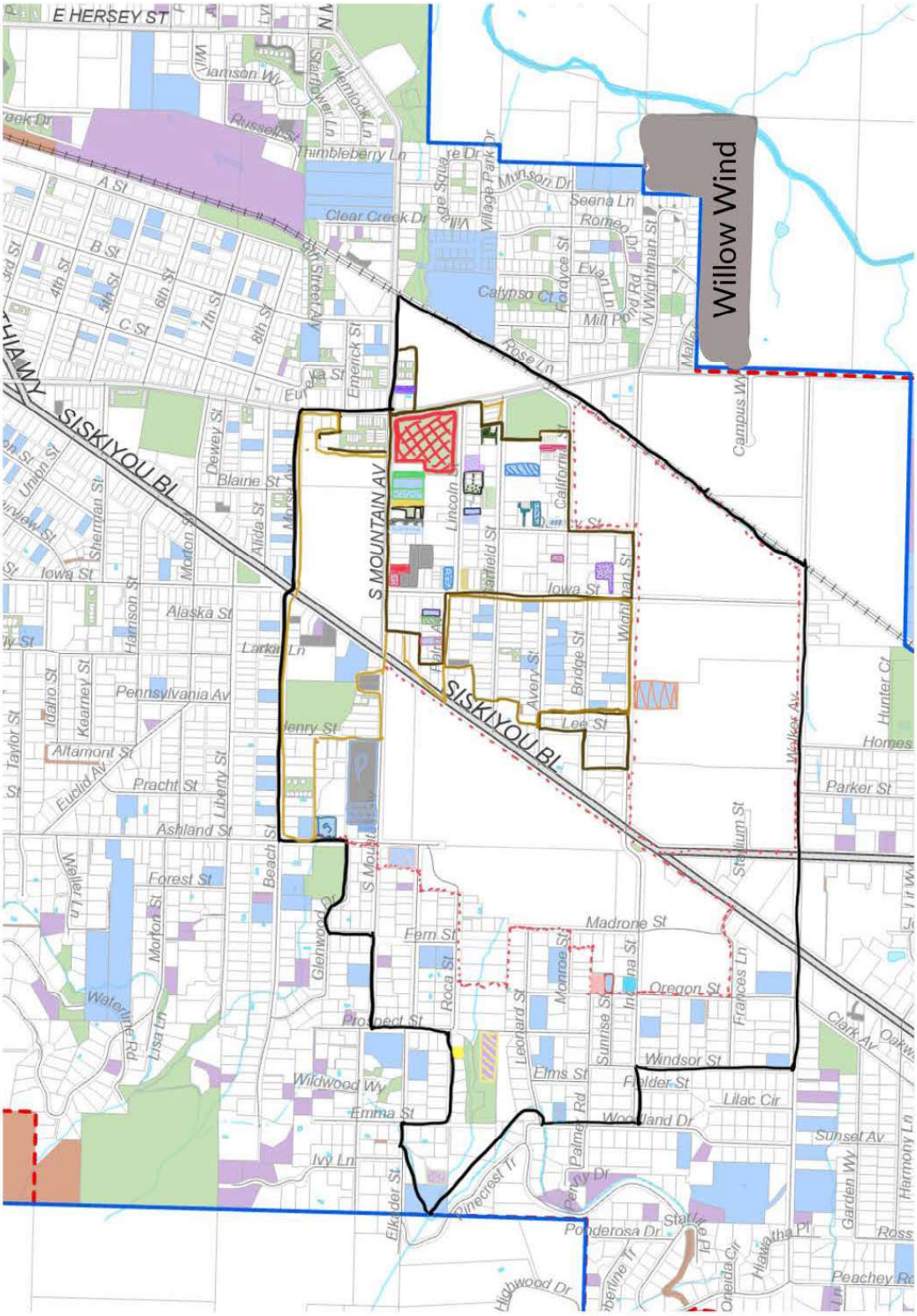
• Provide a detailed budget including but not limited to land acquisition costs, materials, building permit costs, predevelopment costs, professional services, and any other administrative costs.
Please see attached (C)

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.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Forest St
Blaine St
Alaska St
Pracht St
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Clear Creek Dr
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Russell St
Calypso Ct
Seena Ln
Romeo Ct
Mill Pond Rd
Rose Ln
Campus Wy
Hunter Ct
Homes
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Garden Wy
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Clark Av
Frances Ln
Sunrise St
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Glenwood Dr
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Harrison St
Sherman St
Union St
Dewey St
Alida St
Lincoln
California St
Garfield St
Avery St
Bridge St
Wightman St
Lee St
Hargadine St
Stadium St
Wellers Av
Campus Wy
Village Park Dr
Munson Dr
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Emerick St
Eureka St
Larkin Ln
Henry St
Hillview Dr
Highwood Dr
Pinecrest Tr
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Euclid Av
Idaho St
Kearney St
Taylor St
Harrison St
Sherman St
Union St
Dewey St
Alida St
Blaine

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 Feasibilty	$ 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,

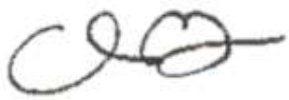
I am writing this letter of support for Sunstone Housing Collaborative towards the effort to build organizational capacity for the pursuit of furthering work into the area of congregational housing development and partnership with the SOU Institute for Applied Sustainability focusing on affordable housing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

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

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	
Revenue	
Ashland Housing Trust Fund	$ 100,000.00
Rogue Valley Council of Governments/ SOREDI	$ 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**
Expenses	
Land Acquisition*	**$ 0**

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

PAM MARSH
STATE REPRESENTATIVE
DISTRICT 5
SOUTHERN JACKSON COUNTY

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

Pam Marsh
Representative House District 05
Southern Jackson County

Capitol Address: 900 Court St NE, H-474, Salem, OR 97301 – Phone: (503) 986-1405
rep.pammarsh@oregonlegislature.gov - www.oregonlegislature.gov/marsh

JEFF GOLDEN
STATE SENATOR
DISTRICT 3

OREGON STATE SENATE

February 20, 2026

RE: Letter of Support for Trusted Homes Community Land Trust

To Whom It May Concern,

It is my pleasure to offer my strong support for **Trusted Homes Community Land Trust** and their vital work in addressing the housing affordability crisis in Southern Oregon.

The Rogue Valley is currently facing unprecedented challenges regarding housing stability. As the "missing middle" is increasingly priced out of our local markets, we risk losing the very workforce—teachers, healthcare workers, and service providers—who make our communities thrive. Trusted Homes provides a proven, innovative solution to this crisis through the Community Land Trust (CLT) model.

By decoupling the cost of land from the cost of the home, Trusted Homes ensures that homeownership is not just a one-time benefit for a single family, but a permanent community asset. Their current project in the **Beach Creek Subdivision**, which will bring six permanently affordable units to Ashland, is a testament to their ability to partner effectively with local municipalities and deliver tangible results.

What distinguishes Trusted Homes is their commitment to long-term stewardship. Their model doesn't just put people in houses; it creates a foundation for generational wealth and community equity, particularly for those who have historically been excluded from the American dream of homeownership.

I am proud to see this level of leadership and innovation emerging from within our district. I fully support their efforts to secure the funding and partnerships necessary to scale their impact across the Rogue Valley. I urge your full consideration of their application.

Please do not hesitate to contact my office if you require further information regarding my support for this essential organization.

Sincerely,

Senator Jeff Golden, Oregon Senate District 3

Office: 900 Court St. NE, S-415, Salem, OR 97301 – (503) 986-1703 – sen.jeffgolden@oregonlegislature.gov

RESOLUTION NO. 2008-34

A RESOLUTION ESTABLISHING POLICIES AND PROCEDURES FOR ADMINISTRATION OF THE AFFORDABLE HOUSING TRUST FUND

RECITALS:

A. **WHEREAS**, the City of Ashland City Council approved the establishment of the Affordable Housing Trust Fund (Ordinance 2966), to keep our community diverse by facilitating the production and preservation of affordable housing throughout Ashland; and

B **WHEREAS**, The policies and procedures for administration of the Affordable Housing Trust Fund establish eligible uses, eligible applicants, the method by which funds are awarded, and selection criteria; and

C. **WHEREAS**, the City Council understands the changing nature of the housing market and corresponding housing needs, and therefore has established the policies and procedures for administering the Ashland Housing Trust Fund (AHTF) to remain flexible to respond to changing market conditions and opportunities; now therefore

THE CITY OF ASHLAND RESOLVES AS FOLLOWS:

SECTION 1. Purpose

1.1 The purpose of the City of Ashland's Affordable Housing Trust Fund (AHTF) is to establish a dedicated source of revenue to provide ongoing funding for housing projects or programs that address the housing needs of Ashland residents. To this end the AHTF is established to address the primary purpose of encouraging the creation of housing for homeownership or rent, at a cost that will enable low and moderate income families to afford quality housing while paying no more than thirty per cent of gross household income on housing.

1.2 To promote the rehabilitation, preservation and production of quality, well designed rental and ownership housing the AHTF will award funds to community development partners that are furthering the AHTF mission. It is expecting that the local contributions made through Ashland's Affordable Housing Trust Fund will assist in maximizing the leveraging of State and Federal funds, as well as encourage private sector investment in affordable housing.

1.3 Understanding the high cost of housing regionally, it is evident that low and moderate income households are not being served by the housing market. To address the disparity between the cost of housing and the means of resident households to afford housing, the Affordable Housing Trust Fund aims to provide direct financial support to projects that retain or increase the supply of needed housing for households earning less than 120% the Area Median Income as defined by HUD.

1.4 The Administrative Procedures associated with the Affordable Housing Trust Fund, including fund administration, determination of eligible applicants, eligible uses and activities, award preferences, eligibility criteria, award process, and selection criteria are hereby established.

Section 2. Eligible Applicants

2.1 The Affordable Housing Trust Fund is structured to ensure that many different types of organizations are eligible to receive financing.

2.2 Eligible applicants include governmental subdivisions, community development corporations, local housing authorities, community action agencies, community-based or neighborhood-based non-profit housing organizations, other non-profit organizations, for-profit entities, and private employers.

Section 3. Eligible Uses and Activities

3.1 Affordable Housing Trust Funds shall support the creation or preservation of housing that is affordable to households with incomes that do not exceed 120% of the area median income, as defined by HUD for the Medford-Ashland metropolitan service area.

3.2 Affordable Housing Trust Funds will be focused on those activities that create, preserve or acquire housing within the Ashland Urban Growth Boundary.

3.3 Housing developments financed by the Affordable Housing Trust Fund (AHTF) which receive subsidy, financing, tax credits or other assistance under a State or Federal housing program, may contain market rate units insofar as permissible under those programs and/or to the extent that they are necessary to support the creation of and/or on-going sustainability for the affordable housing units in the development. However, Affordable Housing Trust Funds may not be used to support such market rate units.

3.4 Affordable housing units developed utilizing subsidy from the Affordable Housing Trust Fund shall comply with the income, rent and purchase housing cost limits established by Resolution 2006-13, as amended, and as restricted by a covenant prepared by the City of Ashland.

3.5 The Affordable Housing Trust Funds can be provided as either a grant or a loan depending on the project or program receiving funding. To retain a significant degree of flexibility the eligible uses have a broad application including the following:

3.5.a Acquisition and *Construction* of new affordable housing. Eligible acquisition and construction costs include reasonable costs associated with building or land purchase, including but not limited to:

- Purchase price
- Option costs
- Financing fees
- Appraisal costs
- Closing costs
- Interest
- Inspection fees
- Title insurance
- Relocation costs
- Architectural/engineering fees
- Construction costs

3.5.b Conservation of energy through the use of "green" technologies provided that the benefits of the energy savings is passed on in the form of reduced costs to the qualified occupants of the affordable housing.

3.5.c Land Banking: the purchase of land to be dedicated toward the development of affordable housing in the near or long term.

3.5.d Predevelopment activities undertaken by a community development organization in support of the development of affordable housing including planning, architectural services, engineering services, landscape design, legal services, surveys, appraisals, site clearance and demolition, environmental clearance, permit application fees and system development charges.

3.5.e Bridge loans to assist in development of low-income housing (for rental or owner occupancy). Bridge loans are intended to provide funding to permit housing projects to proceed in advance of the availability of permanent project funding. Bridge loan funding is available for acquisition or construction activities.

3.5f Capacity Building for non-profit affordable housing providers in the form of direct grant awards to fund administration of an affordable housing project or program.

3.5.g Rehabilitation and Emergency Repairs as part of an established program to secure units as affordable or to provide direct benefits to existing low-moderate income households. Eligible rehabilitation and emergency repair costs include but are not limited to:

- Architectural/engineering fees
- Construction costs
- Relocation costs
- Hazardous materials abatement including lead based paint noticing consistent with The Federal Lead Safe Housing Regulations HUD requirements at 24 CFR §35

3.5.h Direct benefits to low-moderate income households through an established program including down payment assistance, rental assistance, mortgage foreclosure prevention, emergency housing vouchers, homeownership training, renter education, or other programs intended to increase housing opportunities for Ashland's low-moderate income residents.

3.5.i Transitional and Emergency Housing for homeless individuals and families through an established program to move people toward self-sufficiency.

3.5.j Other uses as deemed appropriate by the Ashland City Council as supporting the development or preservation of affordable housing within the City of Ashland.

Section 4. Preferences

4.1 The general criteria of selection are found in Section 8 and may be modified through the annual Request for Proposals, however the following preferences are provided as general guidance for future applicants for Affordable Housing Trust Funds.

4.1.a Developments that produce "new" affordable housing units. *New affordable housing units* shall include housing units constructed where none had existed previously, abandoned or fire-damaged residential units to be returned to residential use, and non-residential or non-residentially-zoned property converted to residential use. Any designated new affordable housing units shall be secured as affordable through recorded Resale Restriction Covenants.

4.1.b Developments that provide new affordability. *New affordability* refers to existing housing where a new level of affordability is provided that does not currently exist. This could occur in rental or ownership housing where the number of affordable units is increased; where a portion of existing units will be made affordable to households at income levels substantially lower than the units previously served; or where the term of affordability on the units will be extended for a period beyond thirty (30) years.

4.1.c Developments of housing utilizing the Land Trust model to secure property and perpetual affordability.

4.1.d Developments that include joint ventures between multiple non-profit developers and or for-profit developers, working in partnership, to complete an affordable housing project

4.1.e Developments that include a joint venture between service providers and non-profit affordable housing developers to create projects that contain additional benefits to low income individuals in the development of the project, or additional services for the residents upon completion.

4.1.f Developments that incorporate the use of "green" building materials, use of energy-efficient appliances, low-water use landscaping, and incorporation of building design and operational factors that minimize energy use and resource consumption as well as avoid indoor health impacts to achieve Earth Advantage Certification.

4.1.g Developments that include affordable units for the disabled and the homeless.

4.1.h Projects that propose long term affordability.

4.1.i Projects that are sponsored by non-profit organizations.

4.1.j Projects that use private funding sources and State funding sources to leverage the least amount of Ashland's Affordable Housing Trust Funds.

Section 5. Fund Administration

The Affordable Housing Trust Fund (AHTF) originated through the direction of the Ashland City Council and Ashland Housing Commission.

5.1 The City of Ashland acts as fiduciary agent and administrator of the funds.

5.2 Funds dedicated to the Ashland Housing Trust Fund shall be exclusively reserved to support the eligible uses activities identified in Section 3, and shall not be used for the general operation of the City.

5.3 The City of Ashland shall issue a request for proposals (RFP) to announce the availability of funds. The Affordable Housing Trust Fund RFP issuance shall be timed to run concurrent with the Community Development Block Grant Program award process.

5.4 The City may issue a Notice of Funding Availability (NOFA) to specifically target up to 10% in available Affordable Housing Trust Funds to undertake eligible uses and activities identified in Section 3.

5.5 The City of Ashland Housing Commission, and City Staff as designated by the Director of Community Development, shall review applications for Affordable Housing Trust Funds to determine project eligibility and evaluate the applications based on the selection criteria provided in the issued Request for Proposals. The Housing Commission, and City Staff, shall provide recommendations to the City Council who shall make final award decisions.

5.6 The City aims to administer the Affordable Housing Trust Fund in a manner consistent with other affordable housing programs such as the Ashland Community Development Block Grant Program. The implementation of a comparable application, application evaluation, and approval process will provide housing developers with a consistent and coherent method for securing housing funds from the City. Coordination of the grant allocation process with other local and state funding application timelines, will help ensure that AHTF funds are best applied to leverage additional resources in support of the housing projects.

5.7 Affordable Housing Trust Funds will be allocated in a manner consistent with the threshold criteria provided Section 8, and consistent with State and Local Public Contracting law.

Section 6. Match Requirements

6.1 The Ashland Housing Trust Fund is intended to support the development of needed housing, but is not intended to provide the sole source of funding for any development project or housing program. To ensure that affordable housing providers, and organizations that assist individuals and families in obtaining needed housing, do not rely exclusively on AHTF to support their activities, it has been determined that;

6.2 The Affordable Housing Trust Fund contribution shall not exceed more than 50% of the total project, or program, cost. Required Match can be met utilizing Community Development Block Grants, State or Federal Funding, direct contribution from the applicant, private donations, and the contribution of land, materials or labor to the project.

6.2.a In the case that land previously owned by the applicant is considered as required match, the value of the land shall be determined by a City approved certified appraisal completed by the applicant, unless otherwise directed in Oregon Revised Statute or City Municipal Code.

6.2.b The valuation of land, and available equity to be considered as matching funds, shall be verified by the City prior to the disbursement of an AHTF grant when its value is considered as required matching funds.

6.2.c Donated materials and labor which are proposed as required match through the development of a project shall have their value estimated at the time of application. The actual value of these contributions is subject to verification by the City at completion of the project.

6.2.d Award recipients shall provide verifiable accounting for donated labor and materials, when such was necessary to satisfy the AHTF match requirements.

6.3 A recipient of an AHTF grant that fails to verify the match requirements have been satisfied at the conclusion of a project

would be considered cause for the City to require full or partial repayment of any AHTF grants awarded to a project.

Section 7 – Allocation of Funds

The Affordable Housing Trust Fund is structured to allow the flexibility for the City, and housing providers, to be responsive to opportunities that arise that require an immediate expenditure of a relatively small amount of funds to secure property, or financing, as well as to ensure the majority of Affordable Housing Trust Funds are allocated through a annual competitive award process.

Establishment of two distinct and separate award processes is intended to provide for both consistency and flexibility. The issuance of a Request for Proposals (RFP) which will allocate 90% of the available allocation of Affordable Housing Trust Funds will be coordinated with other local and State funding cycles to allow applicants to best structure their project financing. Additionally a Notice of Funding Availability (NOFA) may be announced, as funds permit, to allocate up to 10% of the annual funding available. A NOFA is primarily intended to be responsive to immediate needs for a limited grant or loan if needed for predevelopment activities which will further the mission of the AHTF.

The distribution of any and all AHTF funds through Competitive or Non-Competitive awards as described in Sections 7.1 and 7.2, will be in accordance with State and Local Public Contracting laws.

7.1. Competitive Awards - Request for Proposals (RFP)

The City of Ashland has a limited amount of Affordable Housing Trust Funds to use each year in comparison to the scope of the housing needs within the community. As a result, it is essential that the funds are used to meet the City's priorities in an efficient and cost-effective manner. To this end a competitive award process has been established and a set of award criteria shall be developed to evaluate proposals received through a Request for Proposals (RFP) process in terms of how they address the specific priorities outlined in the annual RFP.

The steps for making the competitive grant awards or loans is outlined below.

7.1 a. The City of Ashland may issue a Request for Proposals on an annual or intermittent basis depending on availability of funds, providing applicants with a minimum of 45 days to respond to the request.

7.1 b City Staff shall assess the project proposals to determine if the eligibility criteria are met and shall develop a recommendation to provide to the Ashland Housing Commission and the City Council.

7.1 c The Ashland Housing Commission will provide applicants the opportunity to make a presentation on their project proposal and provide community members the opportunity to comment by holding a public meeting.

7.1 d The Ashland Housing Commission will develop a grant award recommendation to the City Council using the AHTF criteria to determine which projects best meet the City's spending priorities. Each application will be rated on a numeric scale as established in the annual RFP for each criterion of selection (Section 8).

7.1 e The Ashland City Council shall make a final decision on the award of Affordable Housing Trust Funds.

7.1 f The City of Ashland shall prepare an agreement between the City and the award recipient. The Agreement shall outline the conditions of award and shall be executed prior to the disbursement of any Affordable Housing Trust Funds.

7.2. Notice of Funding Availability (NOFA)

Upon electing to initiate a Notice of Funding Availability (NOFA) the City shall issue a notice of funding availability through publication in the Ashland Daily Tidings and on the City's Website providing 30 days for eligible applicants to submit qualifications for funding. The City shall review all applications received to determine if the applications meet the City's threshold criteria. If the criteria are met then the funds are awarded to, or reserved for, the applicant. Funds available through the NOFA process are awarded on a first come, first served basis, until reaching the annual funding cap. A reserve award granted to an applicant may be rescinded by the City if the applicant does not undertake the activities identified in response to the NOFA in advance of the City's issuance of another RFP or NOFA.

7.2.a On an annual basis the City shall determine the amount of funds available to be distributed through a NOFA procedure

7.2.b In no case shall the amount disbursed through the non-competitive process exceed 10% of the annual AHTF revenue in a given program year.

7.2.c The City of Ashland recognizes that the nature of affordable housing development acquisition of property is often opportunity dependant. Further many nonprofit housing developers lack the resources to undertake feasibility studies, due diligence inspections, preliminary drawings and other activities required to evaluate potential projects as well as apply for project financing.

7.2.d To enable non-profit organizations, community development organizations, the Housing Authority of Jackson County, and the City of Ashland, to be responsive to opportunities outside of the annual Request for Proposals timeline, the City may reserve a portion of Affordable Housing Trust Funds to support pre-development activities.

7.2.d.1 Predevelopment activities undertaken by a community development organization in support of the development of affordable housing including planning, architectural services, engineering services, landscape design, legal services, surveys, appraisals, site clearance and demolition, environmental clearance, and payment of permit application fees may be supported through a non-competitive award of a predevelopment grant that may be required to convert to a loan if the project receives full funding.

7.2.d.2 For-profit developers are not eligible to apply for Ashland's Affordable Housing Trust Funds to assist with predevelopment costs.

7.2.e The City of Ashland is eligible to utilize the funds reserved for the NOFA process to conduct eligible activities as described in Section 3.

7.2.f The City may fund through a NOFA process an ongoing down-payment assistance program, rental assistance program, education program, rehabilitation program, or other programs intended to increase housing opportunities for Ashland's low-moderate income residents which are administered by a non-profit or governmental organization.

Section 8 AHTF Grant or Loan Award Threshold and Selection Criteria

8.01 The project is considered an eligible use or activity under Section 3, and benefits households earning less than 120% the Area Median Income.
(threshold verification)

8.02 If the project is related to the provision of technical assistance to affordable housing providers, the use of Ashland Housing Trust Funds functions to increase the capacity of the organization to specifically address the mission of the AHTF. (threshold verification).

8.03 Affordable Housing Trust funds shall be limited to the minimum amount necessary to complete the project. The lower the percentage of AHTF funds requested, relative to the full project costs, the higher ranking the project shall be given.

8.04 The project addresses the unmet housing needs as identified in the Ashland Housing Needs analysis or Consolidated Plan.

8.05 The lower the income level that is targeted for the benefiting households, the higher the ranking the project shall be given.

8.06 The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the City. The greater the number of units provided, the higher the ranking the project shall be given.

8.07 The project retains the affordable housing units as affordable. The longer period of time the units remain affordable, the higher ranking the project shall be given.

8.08 The project addresses energy conservation through the integration of green building technologies in new construction, or achieves greater energy efficiency through rehabilitation of existing housing.

8.09 The project maximizes partnerships in the community (volunteers, in-kind contributions, cash contributions, multiple organizations involved, etc.).

8.10 The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate service provided by another organization.

8.11 The agency submitting the proposal has the capacity to carry out the project and has had demonstrated successes completing projects of similar scope.

8.12 The budget and time line are thorough and realistic.

8.13 The project is ready for implementation.

8.14 If the project includes the acquisition of property, the identified property is currently available for acquisition and the applicant has secured either a purchase option or letter of interest from the seller. If the applicant is also applying for federal funding (Community Development Block Grants or HOME) they should carefully review procurement requirements and limitations before obtaining a purchase option.

8.15 That relocation of existing residents will be minimized, and when necessary the applicant has included accurate relocation assistance costs as part of the project pro forma.

8.16 The proposal demonstrates that Ashland Housing Trust Funds are the most appropriate funding source, and necessary, for the project.

8.17 Additional selection criteria may be developed and included in the annual RFP to best direct Affordable Housing Trust Funds toward an identified priority need. Numeric Rankings for each of the selection criteria shall be incorporated into the annual RFP.

SECTION 9. This resolution was duly PASSED and ADOPTED this 16 day of September, 2008, and takes effect upon signing by the Mayor.

Barbara Christensen

Barbara Christensen, City Recorder

SIGNED and APPROVED this 23 day of September, 2008.

David Chapman

David Chapman, Council Chair

Reviewed as to form:

Richard Appicello

Richard Appicello, City Attorney

From: HO Development * HCS <HO.Development@HCS.oregon.gov>
Sent: Friday, April 3, 2026 8:33 AM
To: Linda Reid <linda.reid@ashland.or.us>
Subject: RE: LIFT Homeownership Program Waitlist

[EXTERNAL SENDER]

Good afternoon, Linda,

Thank you so much for reaching out to confirm what being on a waitlist means for our program as you work with Trusted Homes. Our LIFT program has been growing substantially over time, which unfortunately means that we receive far more applications than we can fund each year. Our awards are issued on a first-come, first-served basis, which means that most of our applicants apply on the first day we begin accepting applications, and ultimately the decision will come down to a set of tie-breaker criteria for applicants who apply on the first day. Applicants who are not selected are placed on a waiting list in case projects that were selected can't meet the remainder of our due diligence criteria or in case we receive more funding. Trusted Homes was placed in their current position on the waiting list, not due to any concerns with the application, but simply a matter of timing on the submission of the application which placed all of the Day 1 applications ahead of the project on the first-come, first-served selection process.

Our next round of funding will be available in September, at which time we will redo the waitlist. All the applicants currently on the waitlist will be treated as though they resubmitted their application on the first day of the offering, as well as any new applicants between now and that date. While I can't make any guarantees at this time, we believe that Trusted Homes has a strong chance of being selected in the September offering. This year we awarded funding to Day 1 applicants with a tie breaking score as low as 25 points, and Trusted Homes has a score that is significantly higher. In fact, Trusted Homes is one of the highest-scoring projects we received this year and would have been selected if not for the timing issue. If we receive similar quality submissions between now and September, we will be thrilled to be able to move forward with this project if there is any flexibility available in your own funding sources.

If Trusted Homes is selected in September, we would provide a formal Invitation to Complete Due Diligence that can be treated as a Letter of Intent from OHCS. The applicant would begin Due Diligence as soon as they would have the capacity to do so. I've attached a copy of our Attachment A, which details those requirements more thoroughly. September applicants would have until September 3, 2027, to complete Due

Diligence and until December 17, 2027 to close on the LIFT loan, but we can work as quickly as the applicant can to get their project approved and closed. The only delay we would have on our side would be that once the applicant completes Due Diligence, we would need to get approval from our Housing Stability Council, which only meets on the first Friday of every month, but as long as the project completed due diligence by roughly the 15th of the month, we can likely get them on the next agenda.

Thank you,

Jessica MacKinnon

Senior Homeownership Development Program Analyst

Homeownership Division

Oregon Housing & Community Services

725 Summer St NE, Suite B | Salem, OR 97301

Cell: 971.599.0582

jessica.mackinnon@hcs.oregon.gov

(she, her, hers)

From: Linda Reid <linda.reid@ashland.or.us>
Sent: Thursday, April 2, 2026 12:21 PM
To: HO Development * HCS <HO.Development@hcs.oregon.gov>
Subject: LIFT Homeownership Program Waitlist

Good afternoon,

I am writing in hopes of getting some clarification on the LIFT Homeownership program award waitlist. The City of Ashland has been working with Trusted Homes on the development of 6 affordable housing units in Ashland. We have a couple of grant awards to

that organization that are contingent upon them receiving funding to complete the development. Being put on a waitlist for lift funding puts these awards in flux, and I am hoping that someone from your department can provide some information regarding what it means for an organization's application to be waitlisted. If you are able to provide some information regarding the likelihood of receiving an award in this fiscal year/program year, or a potential timeline for receiving an award if an organization has been waitlisted.

Any information or insight you could provide would be greatly appreciated.

Thank you,

Linda

Linda Reid, MSW

Housing Program Manager

Pronouns she/her

City of Ashland

Community Development Department

20 E. Main, Ashland, Oregon 97520

541-552-2043 | TTY 800.735.2900

Linda.reid@ashland.or.us

This email transmission is official business of the City of Ashland, and it is subject to Oregon Public Records Law for disclosure and retention. If you have received this message in error, please contact me at (541) 552-2043. Thank you.

Council Business Meeting

Date: April 21, 2026

Agenda Item	Request for Council to reconsider direction on lawn hours
Department	Police
From	Tighe O'Meara, Police Chief

TIME ESTIMATE
20 minutes

CATEGORY
Action Needed - Motion to approve an action

SUMMARY
Per direction given at the City Council called Special Meeting on Monday April 13th this item has been brought back for City Council to revisit.

POLICIES, PLANS & GOALS SUPPORTED

BACKGROUND AND ADDITIONAL INFORMATION
Since the City designated the lawn area behind 1175 E. Main St as a camping area in May of 2023, occupants have had to vacate every day at 7:30 a.m. This has, realistically, translated to many occupants actually being off the lawn and out of the adjacent parking lot by 8:30 or 9 a.m. At the end of the day the City has allowed residents to return at 7 p.m., with a variance of 4:30 p.m. return time in winter time hours.

As this program has evolved, the rules have as well, with occupants being allowed to stay in place if it is raining outside or during exceptionally cold days.

Toward the beginning of the lawn's existence, many occupants would move from the back lawn to the front lawn during the day, spending the day alongside East Main Street. This equated to this piece of property located at 1175 E. Main Street being occupied by homeless community members 24/7 for a lengthy period of time. This 24/7 occupancy caused extensive damage to the front lawn area, requiring it to be totally re-habbed by the Parks Department. This occupancy also led to a significant rat infestation around the entire property. The rat problem was so pervasive they could be seen running across the breezeway in front of Council Chambers during daylight hours. There was some level of rat incursion into the police station building.

After city management redefined what spaces around the property may and may not be used during the day, the rat problem has subsided with the help of an outside pest control company.

Presently, some occupants of the lawn have been relocating to Garfield Park, and some negative behavior has been observed there. Recently, the City's expulsion tool was used to expel a chronic bad actor from Garfield Park, and after his expulsion was stayed pending an appeal (stayed for for 2 weeks) that expulsion was upheld.

There has been significant community conversation around this matter, with many neighbors of Garfield Park understandably being upset that their ability to use the park is lessened because of the presence and behavior of unhoused community members during the day.

The police department has adjusted tactics and is patrolling that area more often, and using various tools (bike patrol, unmarked police vehicles).

On Tuesday, April 7th, at the Council meeting, in an attempt to mitigate the presence of lawn occupants using Garfield Park during the day, staff was directed to allow occupants to stay on the lawn between 3 p.m. and 10

a.m., plus weekends and holidays as well. Given the habits that have been observed over the last three years, knowing that many occupants will not abide by the actual vacate time, and that some will come back to re-establish their site prior to the official set-up time, this comes very close to allowing 24/7 occupation of the space once again. Staff is concerned that allowing such extensive occupancy of the space will invite another rat infestation.

Additionally, it has been pointed out by some homeless advocates and others that these times are not conducive to lawn occupants being able to accomplish their tasks during the day and still make it back in time to reclaim their spot on the lawn.

FISCAL IMPACTS

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

Staff suggests that Council reconsider its position on this, and issue staff direction that lawn operating hours are at the discretion of the City Manager, while keeping in mind an intent to minimize negative interactions between occupants of the lawn and surrounding neighborhoods. Operating hours to be initially set at 4:30 p.m. to 8 a.m. plus 24 hour occupancy on weekends and federal holidays.

Motion: I move that Council issue staff direction that lawn operating hours are at the discretion of the City Manager, while keeping in mind an intent to minimize negative interactions between occupants of the lawn and surrounding neighborhoods. Operating hours to be initially set at 4:30 p.m. to 8 a.m. plus 24 hour occupancy on weekends and federal holidays.

REFERENCES & ATTACHMENTS

None

Council Business Meeting

Date: April 21, 2026

Agenda Item	Citizens' Budget Committee Appointment
Department	Finance
From	

TIME ESTIMATE

CATEGORY
Action Needed - Motion to approve an action

SUMMARY

POLICIES, PLANS & GOALS SUPPORTED

BACKGROUND AND ADDITIONAL INFORMATION

FISCAL IMPACTS

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

REFERENCES & ATTACHMENTS
1. Avis_ Appointment Application for Citizens' Budget Committee_Redacted
2. Britten_Appointment Application for Citizens' Budget Committee_Redacted
3. Cohen_ Appointment Application for Citizens' Budget Committee_Redacted
4. Drake_ Appointment Application for Citizens' Budget or Municipal Audit Committee_Redacted
5. Larsen_ Appointment Application for Citizens' Budget Committee_Redacted
6. Verner_ Appointment Application for Citizens' Budget Committee_Redacted
7. Werthaiser_ Appointment Application for Citizens' Budget or Municipal Audit Committee_Redacted
8. Gardiner_Appointment Application for Citizen's Budget Committee_Redacted

From: noreply@civicplus.com
To: Ashland City Recorder; Ashland City Recorder; Dorinda Cottle; Dorinda Cottle
Subject: Online Form Submittal: Appointment Application for Citizens" Budget or Municipal Audit Committee
Date: Saturday, December 20, 2025 5:15:59 PM

[EXTERNAL SENDER]

Appointment Application for Citizens' Budget or Municipal Audit Committee

Appointment Process
Thank you for your interest in serving on a Committee.

Your application will be reviewed by City staff. If you are recommended for appointment, your nomination will be presented to the City Council for consideration and approval.

Preference is given to persons with accounting or auditing experience, background or expertise. Additionally, it would be beneficial to have some experience in public sector and/or fund accounting.

Name	Clarice Jean Avis
Preferred Pronouns	*Field not completed.*
Committee You Wish to Serve On	Citizens' Budget Committee
Address	[redacted]
Phone	[redacted]
Email	[redacted]
Occupation	Service Center Assistant
Educational Background	I am a junior at Southern Oregon University pursuing a Bachelor of Science in Business Administration with a concentration in Accounting, a minor in Economics, and a certificate in Applied Finance and Economics (CAFE).
Related Experience	I currently serve as Treasurer for the International Student Association at Southern Oregon University (SOU), where I manage budgets, track expenditures, and support financial planning to ensure responsible use of funds in accordance with SOU's policies. I also work as a Service Center Assistant at the university, assisting the university's Accounts Payable

	department, processing invoices, and handling budget-related documentation. In addition, I served as a citizen member of the City of Ashland's Municipal Audit Committee this year in which I reviewed financial documents prior to the meeting and have gained practical experience understanding how the City manages and reviews its finances.
Interests	After living in Ashland for years, I have come to appreciate the community and cherish the town as a beautiful place that has treated me very well during my time as a student - I am always trying to find ways in giving back to my campus and the Ashland community by contributing in a way that aligns with my academic background and growing interest in public finance. After serving as a citizen member on the Municipal Audit Committee, I found the experience both valuable and motivating. It gave me a practical introduction to how the City's finances are reviewed and discussed, and I would like to continue building on that experience through service on the Citizens' Budget Committee. In addition to my academic studies and my role as Treasurer for the International Student Association, serving on the Budget Committee would allow me to better understand how municipal budgeting works in practice, gain more consistent hands-on experience, and continue learning from other members in the committee while contributing as an engaged community member.
Availability	I am available to attend regularly scheduled meetings and special meetings as needed. I prefer late afternoon and evening meetings.
Additional Information	I have lived in Ashland for three years. In addition to the experience described above, I am comfortable working with detailed financial documents, budgets, and spreadsheets, and I value preparation, follow-through, and clear communication when serving in committee roles.
Signature	Clarice Jean Avis

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From: noreply@civicplus.com
To: Ashland City Recorder; Ashland City Recorder; Dorinda Cottle; Dorinda Cottle
Subject: Online Form Submittal: Appointment Application for Citizens" Budget or Municipal Audit Committee
Date: Monday, January 26, 2026 7:26:38 PM

[EXTERNAL SENDER]

Appointment Application for Citizens' Budget or Municipal Audit Committee

Appointment Process
Thank you for your interest in serving on a Committee.

Your application will be reviewed by City staff. If you are recommended for appointment, your nomination will be presented to the City Council for consideration and approval.

Preference is given to persons with accounting or auditing experience, background or expertise. Additionally, it would be beneficial to have some experience in public sector and/or fund accounting.

Name	Craig Britten
Preferred Pronouns	*Field not completed.*
Committee You Wish to Serve On	Citizens' Budget Committee
Address	[redacted]
Phone	[redacted]
Email	[redacted]
Occupation	Retired
Educational Background	BS University of Connecticut, Urban Economics, undergraduate work, Business Administration, Texas A&M University, Certificate program, Lean Six Sigma, Villanova University.
Related Experience	Budget Commissioner,Municipality of Anchorage, Alaska - 8 years. Senior Management Team, Horizon Lines, Alaska Service ($2 hundred million annual annual revenues), owner, management consulting business (6 years), consultant, business planning, change management, systems implementation, process improvement.

Interests	I live here. I believe that it is my responsibility to contribute to my community if I have useful skills. Although I haven't lived here very long (April 2025), I think Ashland is a wonderful, unique, involved city, and I want give something to help make Ashland better. I feel a wonderful connection to this extraordinary community.
Availability	I am retired, so I have a flexible calendar. I am a member of the several committees of my local community, Mountain Meadows. Other than those commitments, my calendar is fairly open. I prefer daytime meetings.
Additional Information	I cannot think of any additional information that would be helpful.
Signature	Craig Eric Britten

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From: noreply@civicplus.com
To: Ashland City Recorder; Ashland City Recorder; Dorinda Cottle; Dorinda Cottle
Subject: Online Form Submittal: Appointment Application for Citizens" Budget or Municipal Audit Committee
Date: Monday, November 17, 2025 9:07:02 PM

[EXTERNAL SENDER]

Appointment Application for Citizens' Budget or Municipal Audit Committee

Appointment Process
Thank you for your interest in serving on a Committee.

Your application will be reviewed by City staff. If you are recommended for appointment, your nomination will be presented to the City Council for consideration and approval.

Preference is given to persons with accounting or auditing experience, background or expertise. Additionally, it would be beneficial to have some experience in public sector and/or fund accounting.

Name	Carol Cohen
Preferred Pronouns	*Field not completed.*
Committee You Wish to Serve On	Citizens' Budget Committee
Address	[redacted]
Phone	[redacted]
Email	[redacted]
Occupation	retired
Educational Background	BA Economics, University of California, Berkeley Master of Public Policy, University of California, Berkeley
Related Experience	I have 40+ years of experience in the government and non-profit sectors, much of it involving program budgeting and finance. This experience includes: - consultant on local government (CA) finance issues - budget analyst with the Congressional Budget Office - intergovernmental fiscal relations analyst at General Accounting Office and Advisory Commission on intergovernmental Relations - research and technical assistance on the financing of education

	and human services programs - Monitor for federal grant programs. This included detailed review of program implementation, budgets, and audits.
Interests	I want to engage with the governance of my new community using my expertise in public budgeting and finance.
Availability	Yes, I'm available to attend regularly scheduled and special meetings. I prefer evening meetings.
Additional Information	I moved to Ashland in June 2025.
Signature	Carol Cohen

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From: noreply@civicplus.com
To: Ashland City Recorder; Ashland City Recorder; Dorinda Cottle; Dorinda Cottle
Subject: Online Form Submittal: Appointment Application for Citizens" Budget or Municipal Audit Committee
Date: Friday, February 13, 2026 11:28:45 AM

[EXTERNAL SENDER]

Appointment Application for Citizens' Budget or Municipal Audit Committee

Appointment Process
Thank you for your interest in serving on a Committee.

Your application will be reviewed by City staff. If you are recommended for appointment, your nomination will be presented to the City Council for consideration and approval.

Preference is given to persons with accounting or auditing experience, background or expertise. Additionally, it would be beneficial to have some experience in public sector and/or fund accounting.

Name	Haley Drake
Preferred Pronouns	*Field not completed.*
Committee You Wish to Serve On	Citizens' Budget Committee
Address	[redacted]
Phone	[redacted]
Email	[redacted]
Occupation	Operational Finance Manager
Educational Background	Managerial Finance and Real Estate Finance degrees
Related Experience	7 years in finance
Interests	I would like to get more involved in the local politics and I feel like my education and experience would bring value to this committee
Availability	Yes, I am flexible.

Additional Information	Since Nov 2025
Signature	Haley Drake

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From: noreply@civicplus.com
To: Ashland City Recorder; Ashland City Recorder; Dorinda Cottle; Dorinda Cottle
Subject: Online Form Submittal: Appointment Application for Citizens" Budget or Municipal Audit Committee
Date: Thursday, October 30, 2025 5:32:39 PM

[EXTERNAL SENDER]

Appointment Application for Citizens' Budget or Municipal Audit Committee

Appointment Process
Thank you for your interest in serving on a Committee.

Your application will be reviewed by City staff. If you are recommended for appointment, your nomination will be presented to the City Council for consideration and approval.

Preference is given to persons with accounting or auditing experience, background or expertise. Additionally, it would be beneficial to have some experience in public sector and/or fund accounting.

Name	Lawrence Larsen
Preferred Pronouns	He/him
Committee You Wish to Serve On	Citizens' Budget Committee
Address	[redacted]
Phone	[redacted]
Email	[redacted]
Occupation	Sales
Educational Background	Harvard College, Biological Sciences, with Honors Pepperdine School of Law, JD
Related Experience	I have to manage and review business plans for the companies I sell into and have a deep understanding of investment. Will work to better understand local budget nuances, but feel I am a fast learner and love analyzing numbers.
Interests	Support for my community and make sure that Ashland is financially solvent for generations to come

Availability	I am available - prefer evenings but can make days work too depending on the day as I work remotely.
Additional Information	Almost 7 years.
Signature	Lawrence Larsen

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From: noreply@civicplus.com
To: Ashland City Recorder; Ashland City Recorder; Dorinda Cottle; Dorinda Cottle
Subject: Online Form Submittal: Appointment Application for Citizens" Budget or Municipal Audit Committee
Date: Saturday, November 29, 2025 6:42:55 PM

[EXTERNAL SENDER]

Appointment Application for Citizens' Budget or Municipal Audit Committee

Appointment Process
Thank you for your interest in serving on a Committee.

Your application will be reviewed by City staff. If you are recommended for appointment, your nomination will be presented to the City Council for consideration and approval.

Preference is given to persons with accounting or auditing experience, background or expertise. Additionally, it would be beneficial to have some experience in public sector and/or fund accounting.

Name	Lisa Verner
Preferred Pronouns	*Field not completed.*
Committee You Wish to Serve On	Citizens' Budget Committee
Address	[redacted]
Phone	[redacted]
Email	[redacted]
Occupation	retired urban planner
Educational Background	University of Redlands, Bachelor degree (Government/Political Science, Journalism) California State University, San Jose, Master of Urban Planning Massachusetts Institute of Technology, Master of Science in Real Estate Development University of Washington, Certificate in Non-Profit Management University of Washington, Certificate in Non-Profit Fundraising American Institute of Certified Planners (AICP) College of Fellows, Member
Related Experience	I have run spreadsheets for cities and developers; I have worked

	on development project budgets; I have served on 4 HOA Boards of Directors; I understand city and organizational budgets.
Interests	I would like to continue to make a contribution to the City and my community.
Availability	I am retired and have the flexibility to be available both during the day and the evening.
Additional Information	I moved to Ashland in November, 2020. Currently, I enjoy serving on the Planning Commission and on the Ad Hoc Committee on Early Learning and Childcare.
Signature	Lisa S. Verner

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From: noreply@civicplus.com
To: Ashland City Recorder; Ashland City Recorder; Dorinda Cottle; Dorinda Cottle
Subject: Online Form Submittal: Appointment Application for Citizens" Budget or Municipal Audit Committee
Date: Tuesday, March 17, 2026 9:07:04 AM

[EXTERNAL SENDER]

Appointment Application for Citizens' Budget or Municipal Audit Committee

Appointment Process
Thank you for your interest in serving on a Committee.

Your application will be reviewed by City staff. If you are recommended for appointment, your nomination will be presented to the City Council for consideration and approval.

Preference is given to persons with accounting or auditing experience, background or expertise. Additionally, it would be beneficial to have some experience in public sector and/or fund accounting.

Name	Noah Werthaiser
Preferred Pronouns	He/Him
Committee You Wish to Serve On	Citizens' Budget Committee
Address	[redacted]
Phone	[redacted]
Email	[redacted]
Occupation	Project Manager - ACCESS
Educational Background	No formal institutional education that relates to this Committee, but certificates in Project Management from University of Oregon.
Related Experience	I currently serve as the Support Services Project Manager at ACCESS, our region's community action agency, where I work to support vulnerable populations in achieving stability and self-sufficiency. I also chair the Performance and Evaluation Workgroup for the Jackson County Continuum of Care, where I lead efforts to improve the effectiveness and accountability of housing programs across the region.

	In my role, I helped design, implement, and maintain a new chart of accounts and accounting system for the organization. I regularly train staff on its use, adapt it to evolving needs, and generate and interpret financial reports to support decision-making. Additionally, I develop and manage budgets and spending projections for numerous grants, and I have led or participated in multiple subrecipient audits and monitoring processes. Together, this experience has given me a strong foundation in budgeting, financial oversight, and program evaluation, which I would bring to the Citizen Budget Committee.
Interests	I care deeply about the city I live in and want to be more actively involved and informed in how it operates and plans for the future. Serving on the Citizen Budget Committee offers a meaningful opportunity to contribute to transparent, independent review of the City's financial decisions. Given my professional background in budgeting, financial systems, and program evaluation, I believe I can bring a thoughtful and informed perspective to committee discussions. I am also eager to continue learning so I can better serve as a knowledgeable and effective voice for my community through this role.
Availability	Evenings are best, early mornings work well, and I am available for most special meetings.
Additional Information	I have lived in Ashland for nearly my entire life and have a deep connection to this community. I care strongly about making it a place where everyone can thrive, especially those who may not share the same advantages I have had. I am committed to both preserving what makes Ashland special and supporting thoughtful changes that better align with our shared values. In addition to my professional experience in budgeting, financial oversight, and program evaluation, my long-term residency gives me a strong understanding of the community's needs, priorities, and character.
Signature	Noah Werthaiser

Email not displaying correctly? View it in your browser.

From: Dorinda Cottle
To: Sabrina Cotta
Subject: FW: Online Form Submittal: Appointment Application for Citizens" Budget or Municipal Audit Committee
Date: Thursday, April 16, 2026 1:20:42 PM

From: noreply@civicplus.com <noreply@civicplus.com>
Sent: Wednesday, April 15, 2026 5:00 PM
To: Ashland City Recorder <recorder@ashland.or.us>; Ashland City Recorder <recorder@ashland.or.us>; Dorinda Cottle <dorinda.cottle@ashland.or.us>; Dorinda Cottle <dorinda.cottle@ashland.or.us>
Subject: Online Form Submittal: Appointment Application for Citizens' Budget or Municipal Audit Committee

[EXTERNAL SENDER]

Appointment Application for Citizens' Budget or Municipal Audit Committee

Appointment Process

Thank you for your interest in serving on a Committee.

Your application will be reviewed by City staff. If you are recommended for appointment, your nomination will be presented to the City Council for consideration and approval.

Preference is given to persons with accounting or auditing experience, background or expertise. Additionally, it would be beneficial to have some experience in public sector and/or fund accounting.

Name	Mike Gardiner
Preferred Pronouns	*Field not completed.*
Committee You Wish to Serve On	Citizens' Budget Committee
Address	—
Phone	
Email	

Occupation	retired
Educational Background	BS in Business Administration - University of Evansville, Evansville, Indiana Public Service Ethics Training.
Related Experience	Previous member of the CBC. 20+ years of experience on the Park Commission. Various membership on the Planning Commission (1996-2002) and the Transportation Commission (2011-12). 30+ years of experience in transportation industry managing budgets and personnel.
Interests	Concerns about current and future budget considerations. I am an advocate for city services. I would like to have some input on where we place our priorities and how we shape our future budgets. I am a current member of the Ashland Park Commission. My commission term ends in 2028.
Availability	Mostly available, day or night.
Additional Information	40-year resident of Ashland. I have chaired both the parks commission and the planning commission in the past. I have a pretty good understanding of what it takes to be part of this community. I have experience working in a committee.
Signature	Michael A. Gardiner

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Ashland City Council Look Ahead 2026

*All items are placeholders subject to Council action and organizational needs. Not all items will appear on the Look Ahead due to timing or scheduling considerations.

DATE	STUDY SESSION - TOPIC/AGENDA ITEMS	BACKGROUND	Requested Council action	DEPARTMENT	LEAD STAFF
April 20	**Strat plan update (20 min)**	Council request for Strategic plan check in's	listening session, informational only	**CMP**	**Cotta/Rooklyn**
	Building Fund update	Update on city steps to establish a building fund per state requirement; Discussion on building permit fees	Direction on Building Permit Fee approach	**Com Dev/Finance**	Brandon Goldman
	Update on water status			**Public Works**	Scott Fleury
May 4	**Discussion on the Council Budget**	Per retreat, discussion of items in the council budget to potentially discontinue			
	Budget Committee/Council reconvening	Council request for budget check-in	listening session, informational only	**Finance/CMO**	**Morrison/Cotta**
	Facilities Masterplan Next Steps	Council provide staff with direction on how to deal with derelict facilities / operational needs	Staff Direction	**PW/CMO**	**Fleury/Cotta**
May 18					
	Dusk to Dawn Lawn	Per Council request	**Staff Direction**	**CMO**	**Cotta/PD/Legal**
June 1	**Southside Development**	DM DuQuenne request for discussion- topic pending	informational	CMO	**Cotta**
	Manufactured Home Park Zone Chapter 18 Code Updates	Housing Production Strategy recommended action - zoning amendments	Staff Direction	Com Dev	**Goldman**
	Chapter 18 Land Use Ordinance Amendments (tentative)	Land Use Code Amendments and Planning Process changes Per HB 2138 and SB 974 - State requirements	information presented with possible staff direction	Com Dev	**Goldman**
June 15	**Annual APD Report**	Per Council request (formerly Use of force report)	Informational	Police	**O'Meara**
	Storytown Overview	Per Council request (Kaplan/Graham)	informational	Outside Org	**Matt Hoffman**
July 6	**No Meeting - Summer Break**	Per AMC 2.04.020			
July 20	**Review of Strategic Plan Draft (tentative)**				
	Reserve Fund	Discussion regarding appropriate levels	informational presented with possible staff direction	Finance/CMO	
August 3	**Gas Powered Lawn Equipment**	Per CEPAC request	informational presented with possible staff direction	Conservation	Woodward
August 17	**Food & Beverage Tax Amendment Process**	**CM DuQuenne/Bloom**			
August 31	**No Meeting - Summer Break**	Per AMC 2.04.020			
September 14					
October 5	**CBC/Council meeting mid BN Budget review/ forecasting**	Council requested in July of 2025			
October 19					
November 2					

November 16					
November 30					
December 14	**Standing Advisory Committee Annual Updates**				
	TOPICS TO BE SCHEDULED				

DATE	BUSINESS MEETING - TOPIC/AGENDA ITEMS	BACKGROUND	Requested Council Action	DEPARTMENT	LEAD STAFF
April 21	**Exec Session: Litigation Update 5:30pm**			**Legal**	**Johan, Carmel**
	OMA "If I were Mayor..." Contest Winners	Presenting award to contest winners		**Mayor's Office**	**Graham**
	Public Hearing Budget Transfer from General Fund Contingency for cost	Community Center and Pioneer Hall (Council directive to improve		**Finance**	**Bryn Morrison**
	Public Hearing Community Development Block Grant (CDBG) Award(s)	2026 Annual CDBG award hearing - https://or-ashland.civicplus.com/DocumentCenter/View/4280/CDBG_2026_RFP	Make final award selections for 2026 CDBG funds	**CD**	**Goldman**
	Affordable Housing Trust Fund grant awards	Biennium budget allocates up to $200,000 in AHTF grants to eligible projects	Make final award selection(s) for Affordable Housing Trust Funds	**CD**	**Goldman**
	Social Service Grant awards	Biennium budget allocates up to $134,000 in Social Service grants to eligible non-profit organizations	Make final award selection(s) for up to Biennium Social Service Grants	**CD**	**Goldman**
	Award of Construction Contract-Cured In Place Pipe Liner	Approval of a construction contract for CIPP of wastewater and storm drain collection lines		**Public Works**	**Fleury**
May 5	**Exec Session: Real Estate 4pm**			**Legal**	**Johan, Carmel**
	Asian American and Pacific Islander Heritage Month Proclamation				
	National Historic Preservation Month Proclamation				
	Oregon Transportation Infrastructure Bank Loan Resolution	**Approve a resolution authorizing borrowing for the North Mountain rehabilitation project using OTIB**		**Public Works**	**Scott Fleury**
	Resolution -Pioneer Hall/Community Center use			**CMO**	
	Staff Relocation Update			**CMO**	**Cotta**
TBD	**Joint APRC/Council Meeting (Council host)**	**Council requested joint financial reporting meetings**			
	Quarterly Financial Report (Jan - Mar 2026)				
	Median Maintenance			**CMO/Parks**	**Cotta/Dials**
	Parks Fee Discussion			**CMO**	**Cotta**
	Food & Beverage Tax Amendment Process				
May 19	***Exec Session: Tentative 5pm***			**Legal**	**Johan, Carmel**
	Building Safety Month Proclamation				
	Miscellaneous Fees			**Finance**	**Morrison**
	Destination Marketing Contract with Travel Ashland for FY27	FY27 Destination Marketing Services	Contract approval	**CMO**	**Rooklyn**
	Wayfinding Signage Project Costs	Request from Council to compare costs for Wayfinding Signage designs	Staff direction	**CMO**	**Rooklyn**
	Madrone Ridge Management Plan	Decision from council for staff to move forward with creating a Management Plan for the Madrone Ridge Property	Staff direction	**CMO**	**Rooklyn**
	Beach Creek Property transfer to Trusted Homes	Extend the property transfer deadline for Trusted Homes to allow additional time to secure State funding	Revise prior award timeline	**CD**	**Goldman/Reid**

	Public Hearing Imperatrice Property (tentative)			**Public Works**	**Fleury**
June 2	**Flag Week Proclamation**				
	Wastewater and Storm Drain Cost of Service and Rate Report	Acceptance of Cost of Service and Rate Report		**Public Works**	**Fleury**
	Special Presentation: John Pugh-Elks Building Mural				
	Public Hearing-Levy Property Taxes for FY 27, State Subventions			**Finance**	**Morrison**
	Public Hearing & First Reading ORD 3296 Ordinance Adopting a New Manufactured Home Park Zone (MHPZ)		Approval of first reading	**CD**	**Goldman/Severson**
	Public Hearing & First Reading ORD 3297 Ordinance Adopting a New Zoning Map to reflect the MHPZ		Approval of first reading	**CD**	**Goldman/Severson**
	Public Hearing & First Reading ORD 3298 Ordinance Adopting a New Comprehensive Plan Map to reflect the new MHPZ designation		Approval of first reading	**CD**	**Goldman/Severson**
June 16	**Bee City USA Pollinator Week Proclamation**				
July 7	**No Meeting - Summer Break**	Per AMC 2.04.020			
July 21	**Public Hearing and First Reading of an Ordinance Amending Chapter 18.2.3.170-180 Manufactured Home Park Development Standards, Ordinance amending the City's Zoning Map and Land Use Ordinance establishing a Manufactured Home Park Zone (MHPZ)**	Housing Production Strategy strategic action		**CD**	**Goldman/Reid**
August 4	**Hiroshima and Nagasaki Day Proclamation**				
	Adoption of Strategic Plan (tentative)			**CMO**	**Cotta/Rooklyn**
August 12	**Joint APRC/Council Meeting (APRC host)**	Council requested joint financial reporting meetings			
	Quarterly Financial Report (April - June 2026)				
August 18					
September 1	**No Meeting - Summer Break**	Per AMC 2.04.020			
September 15					
October 6	**Indigenous Peoples' Day Proclamation**				
October 20					
November 3	**Joint APRC/Council Meeting (Council host)**	Council requested joint financial reporting meetings			
	Quarterly Financial Report (July - Sept 2026)				
November 17					
December 1					
December 15	**Advisory Committee Reappointments**				
	TOPICS TO BE SCHEDULED				