



Council Study Session Agenda

**ASHLAND CITY COUNCIL
STUDY SESSION AGENDA
Monday, April 1, 2024
Council Chambers, 1175 E Main Street**

***This is joint study session with Ashland Parks and Recreation Commission**

Live stream via rvtv.sou.edu select RVT Prime. Recorded meetings are available on our [website](#).

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

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

5:30 p.m. Study Session

- 1. Public Input (15 minutes – Public input or comment on City business not included on the agenda)**
- 2. DEI Assessment and Strategic Plan**
- 3. SB 1537 – UGB Expansion**
- 4. Homeless Services Masterplan Subcommittee update**
- 5. Adjournment of Study Session**

In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the City Manager's office at 541.488.6002 (TTY phone number 1.800.735.2900). Notification 72 hours prior to the meeting will enable the City to make reasonable arrangements to ensure accessibility to the meeting (28 CFR 35.102–35.104 ADA Title I).





Council Study Session

April 1, 2024

Agenda Item	Diversity, Equity, Inclusion, and Accessibility & Organizational Culture Assessment Results & Next Steps		
From	Molly Taylor Sabrina Cotta	Human Resources Director Interim City Manager/Deputy City Manager	
Contact	Molly.taylor@ashland.or.us sabrina.cotta@ashland.or.us		
Item Type	Requested by Council ☐ Update ☐ Request for Direction ☐ Presentation ☒		

SUMMARY

In June of 2022 Council gave direction to conduct a DEI assessment of the City organization as recommended by the Social, Equity and Racial Justice Commission. Partnering with Paradigm Public Affairs, LLC the City has completed the Assessment and has a strategic plan and action items to address moving forward.

POLICIES, PLANS & GOALS SUPPORTED

- Excellence in governance and City services.
- Respect for the citizens we serve, for each other and for the work we do.
- Belonging through mutual respect and openness, inclusion, and equity.

BACKGROUND AND ADDITIONAL INFORMATION

In June of 2022 the City Council appropriated \$40,000 to conduct an internal DEI assessment of the City Organization. The RFP was published December 1, 2022, on both the City of Ashland website and the Oregonbuys.gov which is the preferred site for posting all RFPs published in Oregon. The deadline to ask questions about the RFP was January 16, 2023, and answers were posted on the City's website. The deadline to respond to the RFP was February 17, 2023. In August of 2023 the City began engagement with Paradigm Public Affairs, LLC to engage in focus groups, one on one interviews and conduct survey. Paradigm Public provided the results in February 2024.

FISCAL IMPACTS

\$40,000 was budgeted for the assessment. Additional investments will be needed to address some action items coming out of this strategic plan to be addressed at a later date and the next biennium.

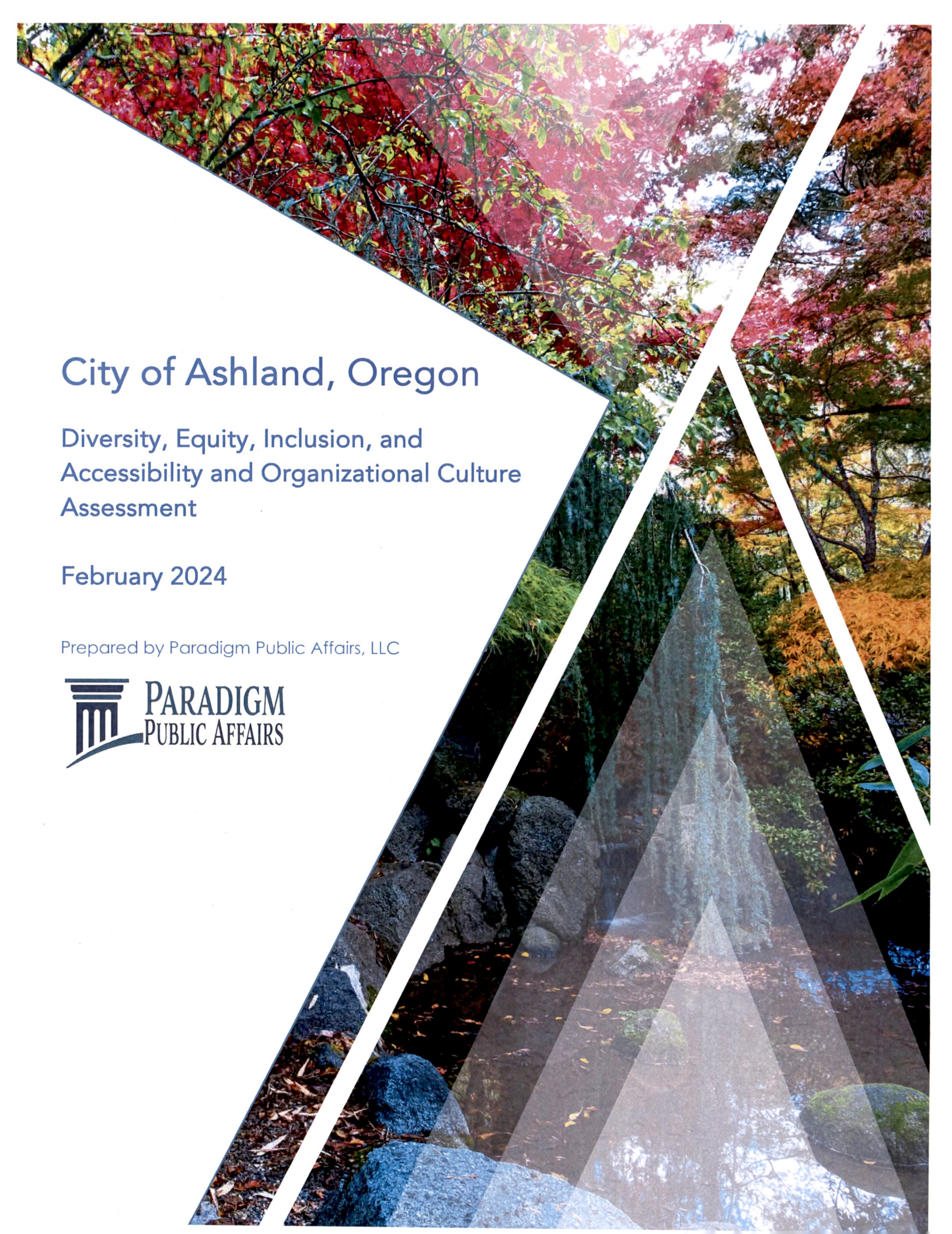
SUGGESTED NEXT STEPS

The City Manager's office and Human Resources Department will continue to work towards implementing the recommendations and action found in the report.

REFERENCES & ATTACHMENTS

- Ashland DEIA & Culture Report
- Implementation Plan
- Recommendation Summary & Priorities
- RFP Response





City of Ashland, Oregon

Diversity, Equity, Inclusion, and Accessibility and Organizational Culture Assessment

February 2024

Prepared by Paradigm Public Affairs, LLC



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THANK YOU AND ACKNOWLEDGEMENT

Paradigm Public Affairs is honored to have had the opportunity to partner with the City of Ashland in its efforts to create and sustain a welcoming work environment and a culture of belonging for City employees. In our time with city leadership and employees, we were impressed by the deep pride in Ashland and a real passion for diversity, equity, and inclusion exhibited by so many City employees. Special thanks go to City Leadership, who were open to candid and frank conversations about diversity, reviewing policies, and other significant efforts that help instill belongingness and support DEIA as part of the organizational culture.

Paradigm extends our thanks to city leaders and employees who shared their personal accounts and perceptions of organizational culture and belonging within the City of Ashland. We recognize the positive intent of City leadership and applaud their collective efforts to embrace inclusion and respond to the needs of the Ashland community in a proactive and meaningful way. As the City moves toward a dynamic and fully inclusive future, we were privileged to have the opportunity to participate in this important and exciting process.



Tanya Settles, Ph.D.

Matt Jones, Ph.D.

Judith Fitzgerald, J.D.

Joyce Haines, Ph.D.

INTRODUCTION

In early 2023 the City of Ashland commissioned Paradigm Public Affairs to conduct a culture and organizational assessment that included an evaluation of belonging and culture through the lens of diversity, equity, inclusion, and access (DEIA). Throughout the fall of 2023, many employees helped facilitate our assessment by ensuring that we had access to staff and resources; offering guidance and feedback throughout the process; helping to organize events to inform staff about the project; and encouraging candid engagement with our team. Paradigm Public Affairs (Paradigm) collected and analyzed qualitative and quantitative data, formed findings, and suggested strategies to enhance organizational culture. The findings, conclusions, and recommendations are those of our Paradigm team.

To achieve the goal of better understanding the internal workings of the City of Ashland from the perspective of staff through the lens of DEIA, Paradigm followed these steps:

- Conducted a baseline review of policies and operating procedures for City governance with a focus on talent management and human resources processes.
- Facilitated focus groups with employees.
- Engaged with leaders, staff, and staff through individual interviews.
- Developed and deployed a customized survey to employees and analyzed those data.

To support the goal of assessing organizational culture, we evaluated public documents and other materials related to staff engagement in service to the community. These multiple sources of data were coded, analyzed, and organized into themes that provide the foundation for findings and recommendations throughout this document.

The perception of community members about actions of Ashland city government was outside the scope of this project. Rather, our assessment focused upon four areas: (1) the extent to which DEIA goals and values of city government are demonstrated as integral components of the City's organizational culture; (2) any unconscious assumptions about how staff conduct their work; (3) any potential for bias in organizational culture related to employees' perceptions of welcomeness and belonging; and (4) opportunities to improve the working environment for staff.

METHODOLOGICAL APPROACH

Paradigm followed Edgar Schein's model¹ that explores organizational culture to gain insight about how City government works, the degree to which the City supports a welcoming work environment, and what that means for community services. Schein viewed organizational culture as a powerful social force that is largely invisible, yet significantly influences financial performance, employee attitudes, and organizational effectiveness. Culture has greater impact on behaviors beyond formal control systems, procedures, and authority; therefore, understanding and managing organizational culture is essential for achieving desired organizational outcomes.

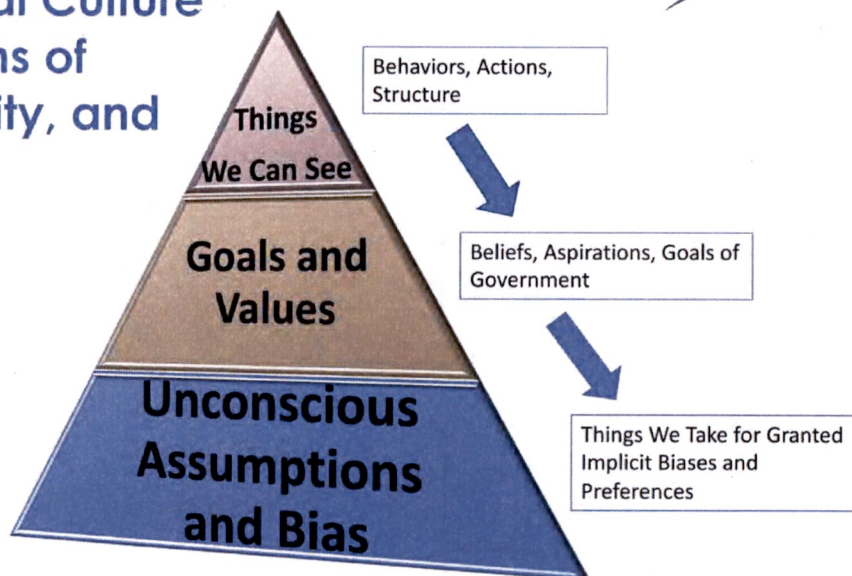
Our Paradigm process began by first examining tertiary features of the organizational culture and workforce that included the behaviors, practices, and structure of Ashland City government. We first examined elements that are seen by people, organizations, and partners that interact with the City. We looked at a variety of information including public documents and resources available to community members through the City's website, local media reports, and social media resources.

Next, we looked more deeply at the goals and values of the workforce through a series of personal conversations, focus groups, and survey data collection. This process gave us insight about whether or how DEIA may (or may not) align with employee work values and experience. Finally, at the deepest level, we looked for unconscious assumptions and bias to gain greater insight into (1) ways that staff interact with each other and the community, (2) how policies and operational procedures are executed, and (3) opportunities for bias related to race, gender, and identity. Schein's model adapted for this project is depicted in Figure 1. This figure represents the theoretical roadmap that we followed in assessing organizational culture and belonging at City of Ashland government.

¹ Schein, E. H. (1983). The role of the founder in creating organizational culture. *Organizational dynamics*, 12(1), 13-28. <https://www.sciencedirect.com/science/article/abs/pii/0090261683900232>

Schein, E., & Twain, M. (2023). Listening as Reflective Practice. *Communication for Constructive Workplace Conflict*, 37.

Organizational Culture Through a Lens of Equity, Diversity, and Inclusion



Our mixed-methods DEI assessment of organizational culture and belonging consisted of both qualitative data (interviews, documents, and focus groups) and quantitative data (a customized survey delivered to all City employees and data records in City files).

QUALITATIVE DATA

In addition to a review of documents related to operations and people management, internal policies, and other public facing documentation, the Paradigm Team conducted qualitative data collection strategies that included private, one-on-one interviews with staff and leaders as well as a series of focus groups that were organized groups that included:

- Managers and Supervisors.
- Parks and Recreation Employees.
- Public Safety Employees.
- Black, Indigenous, and People of Color (BIPOC) Employees.
- Women.
- Randomly Selected Participants.

The data we obtained from these efforts served two purposes. First, the data were collected, coded, and analyzing using a thematic analysis procedure as a stand-alone

data source that informed the narrative of the employee experience at Ashland. Second, the information and insight gleaned from these efforts created opportunities to scrutinize certain aspects of organizational culture and belonging through the survey that was delivered later in the process.

The Paradigm Team met in Ashland from October 23-25, 2023 to collect data from employees through interviews, focus groups, and informal conversation. These data were transcribed and analyzed using an inductive coding strategy followed by thematic analysis. We recognized that staff participation in focus groups was somewhat lower than expected; invitations to attend a focus group were voluntary and not required by the City. The many explanations for low participation may include “DEI Fatigue”, disinterest, or hesitancy to engage in face-to-face encounters with our team and each other to discuss, potentially sensitive topics and experiences. With the perspective that low, or no responses are still meaningful data, we used the information we gained to customize the survey instrument and included open-ended questions to gain more qualitative data that provided a rich context and descriptions of experiences and perspectives of employees. Over 65 survey participants offered additional insight through these qualitative questions, which supplemented information collected during focus groups and multi-participant discussion sessions.

QUANTITATIVE ANALYSIS

Next, we used qualitative data and preliminary findings, along with feedback and input from City and Department leaders, to deploy a full-census survey. Organized around constructs related to DEIA, organizational culture, and belonging, this survey focused upon these categories:

- Trust.
- Work Values.
- Accountability.
- Inclusion and Respect.
- Welcomeness and Belonging.

In total, 140 City employees participated in the survey. The full survey instrument is included in Appendix A. Our data collection window was open between mid-November and mid-December 2023.

Data from this survey were largely analyzed for measures of central tendency. Multiple layers of data analysis were conducted to gain insight related to quantitative data

collected through the survey. We also constructed pivot tables, that allowed us to compare and analyze how different groups of employees responded to each question. These “data cuts” included an analysis by demographic elements of DEIA as well as position and role within the organization.

LIMITATIONS

The rate of participation in this survey was robust, with approximately 64 percent of City staff participating. This level of staff participation in the survey provided results that are generally representative of City government. However, even with relatively high participation rates, self-selection bias in data collection may be a factor in interpreting results. In other words, the number of people who had a strong opinion about DEIA (either heavily supportive or heavily critical of DEIA initiatives) may have impacted the overall results of data analysis. We also recognized that about one-third of survey participants did not identify one or more categories of race, ethnicity, or gender. As a result, we were not able to confidently report on differences and similarities in responses based on demographic information without risking the inadvertent identification of individual participants, although we did take this information into account in formulating results and recommendations.

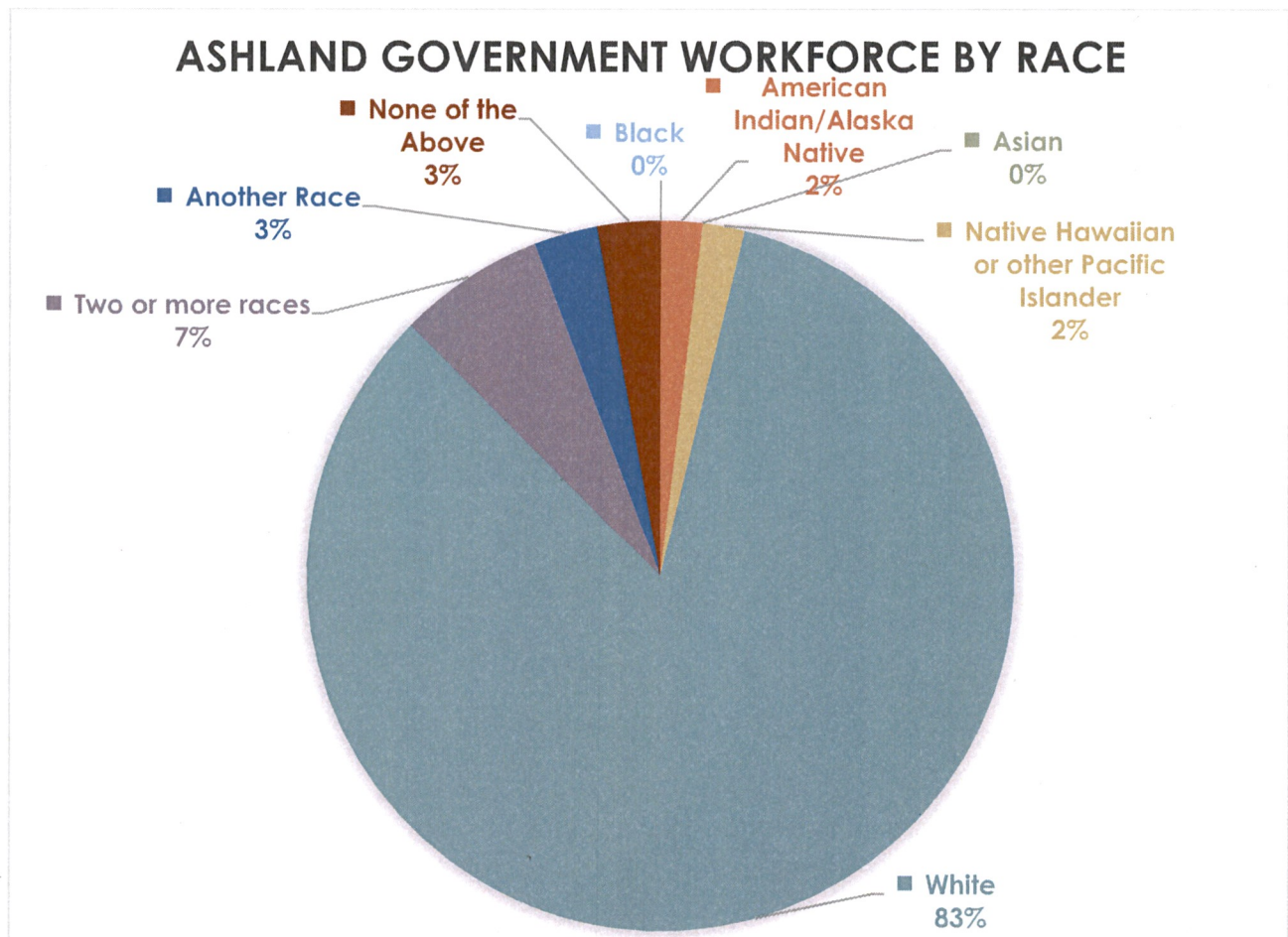
Finally, survey fatigue may have impacted results, though it is not possible to know to what extent survey fatigue may be a factor. People are requested to respond to surveys for multiple reasons that range from customer experience, perspectives at work, and quality of services, among many other reasons. For many people in the United States, responding to a survey can be a weekly ordeal. The phenomenon of data mining overall may have also impacted response rates or data accuracy and viability if participants were concerned that their identities could be disclosed.

DATA SAMPLE

Although not every one of the 140 employees who took the DEIA and Culture Survey answered every question, employees from all departments and functional work areas within the City were represented. The greatest number of participants work in the Fire, Public Works, Police, and Parks and Recreation Departments.

Participant Demographic Summary

- Nearly two-thirds (65 percent) of responses came from staff.
- About 17 percent were from supervisors.
- About 18 percent of responses were from directors, leaders, or managers.
- Average length of service: 10 years.
- Most participants (over 98 percent) are fulltime employees.
- Most participants identified as male (58 percent).
- Most respondents do not experience a disability (physical, mental, or emotional) that limits one or more major life activities (87 percent).
- Over 10 percent of respondents have served in a branch of the military.
- About 5 percent of respondents are Latiné.²



² Latiné (pronounced la-TEE-nay) is a gender-neutral form of the word Latino that was created by LGBTQIA+, gender non-binary, and feminist communities in Spanish speaking countries to remove gender from the word Latino. See callmelatine.com for additional information.

Racial and ethnic identity data of the Ashland workforce collected by the City and collected by the Paradigm survey are substantially similar. However, over one-third (35 percent) of people who engaged in the survey did not identify one or more key demographic characteristics. Although this group had a perspective or experience, they felt important enough to share in the Paradigm survey, we conclude that they did not disclose their race, ethnicity, and/or gender to prevent being personally identified.

THE ASHLAND COMMUNITY

Ashland is situated on the south side of Jackson County, about 15 miles from the California border and on the south end of the Rogue Valley. With Southern Oregon University (SOU) and the Oregon Shakespeare Festival, Ashland is a cultural center in South Oregon. The economy is largely tourism based, with a unique collection of galleries, retail stores, and locally owned businesses. Inside the city are world class parks, such as Lithia Park, open spaces, and a paved intercity bike trail. The population of Ashland is steady, with a minor population decrease, about 0.4 percent, between 2020 and 2022. The cost of housing in Ashland is relatively high compared to the rest of the Rogue Valley, and most employees of the City live outside city boundaries.

Demographically, the community of Ashland resembles the local government workforce representation, with some differences between the two.

Table 1: Community Demographics Compared to City Government Demographics

	Community ³ (percent)	City Government (percent) ⁴	Survey Results ⁵ (percent)	Estimated difference between Community and Workforce ⁶
American Indian/Alaska Native	.06	0.0	1.92	+1.86
Asian	1.7	0.4	0.0	-1.3
Black	.07	1.4	0.0	+1.3
Other Races (includes Two or More Races and Unknown)	8.4	0.0	7.1	-1.3
Native Hawaiian and Pacific Islander	0.4	0.0	1.9	+1.9
White	86.8	91.2	83.6	+4.4
Latiné or Hispanic	10.1	5.5	4.8	-4.6
Female	53.9	23.0	38.1	-30.9
Veteran	5.2	--	10.3	+5.1
Disability	7.2	-- ⁷	9.52	+2.3

Comparing US Census Bureau reporting about the overall population of the Ashland community and self-reported demographics from the survey, the City employs more individuals who identify as Black, White, Veteran, or experiencing disability.

Conversely, the City employs fewer people who identify as female, Asian, Hispanic, or other races.

³ US Census Bureau Quickfacts: Ashland, City, Oregon. Retrieved 17 December 2023 from <https://www.census.gov/quickfacts/fact/table/ashlandcityoregon/PST045222>.

⁴ Data from City of Ashland EEO4 Report 2023.

⁵ Based on 2023 DEIA Culture and Belonging Survey data administered November – December, 2023. Data presented does not include “blank” responses.

⁶ Estimated differences between community and workforce were calculated using US Census Bureau data compared first to City of Ashland EEO4 Report when available, and when not, Culture Assessment survey data.

⁷ As the City did not have data for Disability, we used the survey results in comparison to city demographic trends to estimate the difference.

The City recognizes some key demographic differences between the workforce and the community. In part, recent initiatives to encourage and sustain DEIA initiatives are intended to close gaps so that the workforce more closely represents the community it serves. It is important to note that demographic information alone does not denote diversity. Comparative demographics are a starting point for conversations about DEIA, but demographics alone do not indicate diversity, inclusion, or equity within a government or other organization.

FINDINGS and RECOMMENDATIONS

At its core, this assessment analyzed organizational culture and the City's ability to create and sustain an organizational culture of belonging and welcomeness. For that reason, the Paradigm Team and City engaged in a process to scrutinize the elements of organizational culture, determine how those elements intersect with diversity, equity, inclusion, and access, and present a baseline measurement of the state of organizational culture that includes DEIA. The presentation of findings for this assessment are organized around key constructs of organizational culture and belonging that include:

- Part 1: Work Values and Accountability
- Part 2: Organizational Trust
- Part 3: Organizational Comfort, Welcomeness, and Respect

Each of these key constructs were examined through a variety of data collection and analytic strategies as described in the methodology section.

POSITIVE TAKEAWAYS

The purpose of this assessment was to analyze organizational culture and belonging with a focus on diversity, equity, inclusion, and access. Therefore, while some conclusions in this report appear critical, acknowledging the positive aspects of this assessment is essential to reveal the entire picture. The City has made good progress in creating and sustaining an inclusive organizational culture and work environment. City of Ashland employees should be credited for their dedicated and outstanding service to the community. Throughout our work with the City, we recognize that:

1. City employees, across all departments, programs, and agencies take great pride in their roles as public servants and place great value on an ethos of hard work.
2. The majority of staff at the City believe that DEIA makes the City a better place to work. We also saw evidence of progress that strengthens DEIA as a part of organizational culture in a way that values the contributions of the full workforce, and at the same time recognizes perspectives and thoughts of people with different experiences.
3. Some employees who are critical of the current organizational culture deserve recognition for their candor, honesty, and courage in sharing these perspectives with us.
4. Although Ashland, along with many cities throughout the United States, has DEIA challenges, the many high points of the City of Ashland's organizational culture -- a willingness to learn, genuine curiosity (even when people disagree with one another) and dedication to service to the Ashland community -- should be acknowledged and celebrated.

PART 1: WORK VALUES and ACCOUNTABILITY

The construct of work values was defined by looking at perceptions of goals and values of work at the City of Ashland. These variables were connected to the middle tier of values and beliefs in organizational culture as defined by Schein's model. Some questions in the survey and focus groups were based on Hofstede's⁸ classic theory of work values to reveal connections between organizational values and ways that employees internalize them. In general, we wanted to understand how employees perceive work values associated with coordination, proactivity, accountability for work production, and personal responsibility as part of organizational culture.

DEFINITIONS OF TERMS ASSOCIATED WITH WORK VALUES

Work Values: Work values refer to the personal beliefs, attitudes, and principles that guide an individual's behavior in the workplace. These values shape an individual's perceptions of work and influence work-related decisions and actions.

Coordination: The process of organizing and synchronizing the efforts of multiple individuals working together toward a common goal. Coordination includes elements of clear communication channels, defining roles and responsibilities, and setting goals and objectives. City coordination may refer to teams within work units (e.g., public works crews) or multidisciplinary teams across the City.

Proactiveness: Proactivity means thinking in advance about opportunities, risks, problems and when an individual forecasts a problem they start identifying solutions before the problem occurs. This occurs on the employees' own initiative and without anybody telling the employee to do it. Proactivity means initiative with an eye toward avoiding or resolving problems before they occur.

Accountability: Willingly accepting responsibility for your own actions and accomplishing the things you set out to do at work that may include tasks, projects, or the way people interact with each other and the community.

Personal Responsibility: Personal responsibility is connected to accountability and refers to executing duties and tasks at work with integrity, honesty, and caring about the results.

⁸ Hofstede, G. (1985). The interaction between national and organizational value systems [1]. Journal of management studies, 22(4), 347-357.

WORK VALUES

Throughout this survey, most measures for each construct were collected based on a 5-point scale ranging from 1 (strong disagreement) to 5 (strong agreement). The neutral point was designated as 3 (neither agree nor disagree). Across all questions related to work values, the mean score was slightly lower than 3 (neutral) indicating that disagreement with each statement trended slightly lower than neutral. Table 2 describes survey results from the question block about work values.

TABLE 2: Employee Perceptions of Work Values (n = 116, as percentages)

<i>At the City of Ashland, we place great value on...</i>	Agree	Neutral	Disagree
<i>Coordinating among different work teams</i>	55.2	23.3	21.5
<i>Every employee being proactive in their role</i>	56.9	22.4	20.7
<i>Employees using their initiative</i>	68.1	18.1	13.0
<i>Employees taking responsibility for their work</i>	76.7	10.34	13.0
<i>Showing our appreciation for the efforts of each employee</i>	47.8	22.6	28.7
<i>Holding each other accountable for our actions</i>	50.0	23.3	25.0
<i>Sustaining an inclusive work environment</i>	57.8	25.9	13.8
<i>Making sure work teams include people with diverse perspectives and experiences</i>	40.6	37.1	7.8

Sustaining an inclusive work environment and making sure work teams include people with diverse perspectives are generally viewed as important by staff. Compared to the nearly 14 percent who view sustaining an inclusive work environment and roughly 8 percent who perceive diverse perspectives among work teams to be less than optimal, there is an opportunity to improve in both areas. However, it is substantively less critical than addressing accountability as reported by survey participants.

COMPETING PERSPECTIVES ON WORK VALUES

City employees expressed two distinct perspectives on work values:

1. Employees who welcome the many initiatives and efforts that strengthen DEI and belonging throughout their service to the community view diversity and inclusion as strengthening their capabilities in terms of collaborative and proactive problem solving and vision.

2. Employees who generally value equitable treatment of employees and coworkers but prioritize emphasis on work production and “getting the job done” do not appear to consistently see distinctions between identity groups or perspectives because they limit their view of equity to treating everyone the same, regardless of the outcome.

Both perspectives are important. Both have value despite a tendency for competition between the two. Conversations with employees and the stories that some staff members shared in the open-ended questions on the survey revealed an internal value system that emphasizes “getting the job done” and a sentiment that is not overtly discriminatory. At the same time, this perspective can de-emphasize the value of different perspectives and experiences in the interest of work productivity. This attitude explains some of the ambiguity around sustaining an inclusive work environment and valuing diverse teams. Although employees see the value of diverse and inclusive work environments, they prioritize “getting the work done” over diversity, equity, and inclusion.

A critical mass of the workforce throughout the United States perceives the differences between employees in terms of identity as mattering far less than the ties that bind them related to work productivity. However, when people perceive colleagues as different, there’s a tendency to treat them as “others” rather than peers and coworkers. As an example, we interpreted one survey participant’s assertion that “The City needs to focus on recruitment and retention before focusing on inclusion. None of this will matter if you can’t keep employees” to express good intent to resolve the immediate need for hiring for open positions as a priority over inclusion.

“The City needs to focus on recruitment and retention before focusing on inclusion. None of this will matter if you can’t keep employees”.

In other words, the City’s ability to get the work done is of top importance, and DEIA can be perceived as a secondary need. However, in

-Survey participant

addition to the positive value of a work ethic that focuses on productivity, some employees express their experiences with an “under the surface” belief that employees who identify with affinity or identity groups are perceived as “others”. Consequently, some people experience otherness, particularly related to gender and gender identity. Both phenomena are explored in greater detail in other parts of this report.

This belief, which we encountered frequently through both qualitative and quantitative data collection, suggests some employees are early in DEIA development stages. In

general, some employees hold the concept of equity and equal treatment in high regard, while simultaneously experiencing some challenges in recognizing that equality and equity are not the same thing. Equality means each individual or group of people is given the same resources or opportunities. Equity recognizes that each person has different circumstances and allocates the exact resources and opportunities needed to reach an equal outcome.⁹

In the City of Ashland, some employees may have access to the same opportunities (e.g., different staff opportunities throughout the City are posted to all employees), but their professional outcomes may differ (e.g., women and racial/ethnic minorities may not respond because they've experienced microaggressions at work). In situations like this, some employees feel they've been put into the "other box" and don't feel confident their ideas will be accepted or valued. For people who have been put in the "other box", to participate in the shared value of excellence in work productivity, means conforming with the dominant organizational culture. Consequently, some employees may "code switch"¹⁰ and engage in language and behaviors that conform to the majority while suppressing their individuality, expression, and perspective to do so.

This perspective, which was not uncommon, introduces some specific challenges. Throughout the City, some employees believe that equal treatment results in equitable outcomes. However, "treating everyone the same" means that people who have diverse experiences, perceptions, and ideas may hesitate to share these views with team and individual contributors, consequently jeopardizing DEIA, as well as limiting productivity, creativity, and innovation for the City. In addition, limited opportunities for creativity and innovation are available when many City employees are struggling to keep up with multiple work roles and assignments.

Sentiment from employees who perceive equity as characterized by "treating everyone the same" also tend to perceive that DEIA initiatives are forced on them. Some staff expressed a perception of greater division among employees because of DEIA initiatives. Employees mentioned concerns about "reverse racism", or the idea that emphasizing diversity, inclusion, and equity results in discriminatory practices against

⁹ Milken Institute School of Public Health

¹⁰ Code switching, in this context, means that members of a marginalized or underrepresented group adapt and assimilate to the dominant environment around them. For more information about code switching, see Washington-Harmon, T. (2024). What is code-switching? <https://www.health.com/mind-body/health-diversity-inclusion/code-switching>.

the dominant culture, which, in this case, is Euro-American and perceived by employees as Christian and male. As one survey respondent stated, "Continue to treat everyone fairly and equitably as it has been doing. I think that if an organization tries too hard, it creates the very barrier that it is attempting to eliminate." While this viewpoint is open to many interpretations, we believe this staff member is expressing their perspective that the City is overlooking the needs of the dominant organizational culture (Euro-American and male) and instead prioritizing the perspective of employees who align with other affinity groups and identities.

These findings indicate that the City may gain greater acceptance of DEIA initiatives by shifting resources and effort toward those variables that focus on enhancing team building, particularly within the context of diversity, equity, and inclusion, and access. Another way of looking at this is that current levels of DEIA acceptance related to work values suggest that a barrier to inclusion exists regarding diverse team collaboration at a rate that is less than optimal. At the same time, because pride in work completion and delivery is high. Therefore, strategies that build from the foundation of high value in work product, combined with skill-building related to benefits of diverse team collaboration, may improve overall results in both areas.

Finding 1: Values and Behaviors of Being Proactive, Showing Initiative, and Personal Responsibility are Important to Employees, But May Stifle Creativity and Innovation

RECOMMENDATION 1: Retain and sustain the work value taking accountability for their own work and continuing to support employees using initiative, particularly around problem solving. The City may want to consider developing incentives for employees, such as reward or award processes that emphasize positive outcomes and/or proactive problem resolution through team participation and collaboration.

RECOMMENDATION 2: Increase organizational capacity for creating and sustaining teams that value diverse experiences, perspectives, and thought. Processes to consider may include cross-training and the development of multi-disciplinary teams to resolve high level problems and challenges. An example might be collaboration between public work teams and the police department to resolve traffic enforcement at intersections with high accident rates.

ACCOUNTABILITY

Accountability is one of the most difficult things to assess in the public realm. Everybody wants it, but there's wide variance and disagreement about what it is and how to measure it. In some cases, employees perceive that accountability has been achieved when punitive actions are taken, which causes a tendency to view accountability as a negative aspect of work life rather than as a strategy to create a path toward responsibility and respect.

The topic of accountability came up with relative frequency during focus group discussions. In response, we took a closer look at accountability as a sub-construct of work values. We examined four categories: (1) employee accountability for inappropriate behaviors, (2) City accountability for providing a fair and equitable environment that values diversity of perspectives, perceptions of personal accountability, (3) employee personal accountability for supporting a fair, respectful work environment, and (4) the value that the City places on holding employees accountable for their own work. For purposes of this assessment, we limited our working definition of accountability to recognizing that accountability may be both formal and informal, and for purposes of work values as experienced by employees, accountability refers to individual accountability rather than organizational accountability. The latter is discussed in more detail in the next section on trust.

Across all four measures of accountability, the mean, on a scale of 1 to 5, were at least slightly above neutral. When asked about personal responsibility for supporting a fair environment where different perspectives and values are respected, nearly all (89.7 percent) of staff who answered this question agreed or strongly agreed that they believe they are personally accountable for sustaining a fair environment.

Table 3: Employee Perceptions of Accountability (n = 116, expressed as percent)

	Agree	Neutral	Disagree
<i>Employees are held accountable when inappropriate behavior occurs</i>	47.4	26.7	25.9
<i>The City holds itself accountable for providing a fair environment where different perspectives are valued</i>	50.0	31.9	18.1
<i>I believe I am personally responsible for supporting a fair environment where different perspectives are valued and people are respected.</i>	89.7	8.6	1.7
<i>The City values employees taking accountability for their work.</i>	69.8	16.4	13.8

These results generally support the larger theme of employees feeling they are responsible (and thereby accountable) for their own work. This reinforces the information employees shared with us in interviews and focus groups that the tie that binds organizational culture in Ashland government is pride in work, service to the community, and a genuine interest in ensuring that all employees are treated respectfully. However, there's also a theme that suggests while employees hold themselves accountable for behaviors that support an inclusive workplace, they are less likely to perceive the City as holding itself accountable for building and sustaining the same environment.

Individual Accountability for Inappropriate Behavior

"Traditionally, it has been left up to direct supervisors to address issues with staff or among and between staff, but sometimes supervisors aren't good at addressing conflict, have favorites, or just don't care to follow up, so nothing gets done. This sets a bad precedent for behavioral norms and it is frustrating to go through proper channels to address issues, then get no response".

- Survey Participant

A significant proportion of employees (about 26 percent of survey participants) perceive the City is lacking in terms of holding people accountable when inappropriate behavior occurs. We also heard employees state that when inappropriate behavior occurs by an individual, there's a tendency for the City to either take a blanket approach or avoid the problem entirely rather than engaging in an individual interaction between the employee and their supervisor or leadership. As a result, some

employees perceive they are punished or admonished for behavior in which they did not engage. At the same time, the person responsible for the behavior didn't receive individual guidance on how to improve performance nor were they held accountable for their specific behavior.

Supervisors may be hesitant to have direct conversations with staff members who engage in harmful or non-inclusive behaviors for a variety of reasons. One reason is that supervisors may lack the training and support to feel confident about approaching staff members with behavioral performance advice or guidance. However, when leaders move toward discomfort, rather than away from it, they improve organizational

culture and communication between staff and supervisors.¹¹ These actions may also lead to quicker problem resolution by creating a mechanism to take a holistic view of processes that may diagnose problems at an early stage. Encouraging staff to speak up when they see things going wrong also opens a two-way communication channel with supervisors that supports innovative problem solving and intervention strategies.

Through interviews, focus groups, and discussions with staff, we found that work and behavioral expectations are not always clear. In part, this lack of clarity occurs because the City has not consistently conducted annual performance reviews. Some Departments use performance evaluations on an annual basis while others do not. Some employees reported that they have experienced a performance evaluation a couple of times during their service for the City, if at all. It wasn't clear whether a consistent template or format was used for evaluations.

Performance evaluations, as a process, have pros and cons. On the more negative side, they can be idiosyncratic and biased toward the favor of the evaluator, rather than the employee. Tying performance evaluations to pay-for-performance models can also be challenging, particularly when governments experience revenue shortfalls or other unanticipated large expenditures such as experienced during the Covid 19 Pandemic. Performance evaluation processes that are not clear, open to interpretation and/or bias or are not well developed can create more harm than benefit. This negative potential is particularly strong when employees perceive that they are not valued for their contributions. At their worst, even among organizations that have eliminated formal performance evaluations, performance assessment and management may still occur, but it tends to be in the form of a "black box" that is hidden from employees.¹²

¹¹ Kahn, W. (2003). The revelation of organizational trauma. *The Journal of Applied Behavioral Science*, 39 (4). 364-380.

Modeste, R., & Nelson, J. (2023). Creative Suffering for BIPOC (Black, Indigenous, People of Color) Professionals Experiencing Organizational Trauma: A Conceptual Framework. *Organization Development Review*, 55(4).
<https://web.p.ebscohost.com/ehost/pdfviewer/pdfviewer?vid=1&sid=0156763f-2534-4792-acfd-09824812128c%40redis>

¹² L. Goler, J. Gale, and A. Grant (2016). Let's not kill performance evaluations yet. *Harvard Business Review*. <https://hbr.org/2016/11/lets-not-kill-performance-evaluations-yet#:~:text=People%20want%20to%20know%20where,recognize%20and%20reward%20top%20performance>.

On the more positive side, performance evaluations can set expectations and improve transparency for employees. Encouraging employees to engage in the evaluation process, creates opportunity to showcase the value of their contributions. Performance evaluation processes that include quarterly or monthly 1-on-1 conversations between staff and supervisors also encourages meaningful conversations about challenges, goals, improvements, and successes as they happen. In this way, innovation and creativity is rewarded and there's an opportunity to collaborate on solutions to challenges before the annual performance evaluation process.

Because annual performance reviews have been sporadic throughout the City, leaders have a unique opportunity to collaborate with supervisors and employees to design new evaluations that are affirming and supportive. Innovative performance evaluations that demonstrate appreciation and respect for employees can promote and sustain a positive organizational culture change for Ashland.

Finding 2: Employees feel accountable for producing good work, but don't perceive the City holding itself accountable for sustaining a fair work environment.

RECOMMENDATION 3: Retain the work values associated with individual accountability for work product and fairness. Consider adding a performance factor to the annual evaluation process that focuses on assessing the degree to which individual contributors support a fair environment that values different perspectives.

RECOMMENDATION 4: Provide coaching and resources to managers and supervisors related to conflict management and engaging in difficult conversations with staff related to conduct and behavioral violations of conditions of employment at early stages to support open and clear two-way communication channels about challenges, opportunities, and behaviors associated with work product.

RECOMMENDATION 5: Consider processes and support to supervisors to strengthen their ability to address behavioral missteps of staff in a timely manner. The City may consider strengthening performance evaluation processes to encourage supervisors to comment on communication and behaviors, both positive and negative, as a mechanism to encourage respectful engagement with each other and the community as well as to support a cultural norm of positive intent in communication.

RECOMMENDATION 6: Develop skill building and guidance for supervisors to recognize disrespectful behaviors of people that report to them early and offer interventions and meaningful coaching to address behavioral missteps in the spirit of coaching and support instead of a more punitive approach to teambuilding.

RECOMMENDATION 7: Engage with staff through focus groups and small group discussions to re-design and execute an annual performance evaluation process that is perceived by employees to be fair, transparent, and captures values and contributions of staff on an annual basis.

Connection Between Personal Accountability and Work Product

Most employees at the City of Ashland feel close connections with colleagues, even across different departments and teams. One of the greatest strengths of the City is the sense of interconnectedness and genuine admiration employees have for each other. However, some employees view personal accountability as principally related to work product. They may not see the connection between behaviors that create pockets of “otherness” between themselves and co-workers. Conversations and work-related encounters that challenge employees to consider multiple perspectives and experiences are often met with frustration. As one employee stated, “DEIA is a very overblown topic. Diversity is great, forced diversity is not. It’s simple. Be kind, hire the best person, and it doesn’t matter their background”.

We believe City employees when they tell us that they do not perceive themselves to be racist, sexist, ageist, or any other form of “ist”. At the same time, we also came to understand that many employees view DEIA as being principally focused racial and ethnic identities with other dimensions of diversity as being secondary or non-existent, including the experiences of women and people with non-binary gender identities. For many City employees, the expectation when it comes to “doing the work” is to put your head down, do your job, and don’t tread into territory that may highlight differences between people. There seems to be the false assumption that if employees don’t talk about or recognize any elements of diversity, equity simply means that everyone is treated the same, regardless of outcome or impact.

Challenges for the City associated with personal accountability are more oriented toward conduct and behaviors than work product. A common comment during focus groups, interviews, and as represented in open ended questions in the survey was “This doesn’t have anything to do with me” and “I don’t think this is an area the City should spend resources”. This type of response may be another indicator that some

employees are in early stages of DEIA development and haven't internalized the connections between accountability, workplace culture, performance, and DEIA.

Employees who are moving toward having more candid conversations about DEIA are still cautious about open and public discussions. In some cases, the segment of employees who feel that there's too much of a focus on DEIA also voiced work-related concerns tied to issues of diversity, inclusion, and equity. However, these employees didn't necessarily recognize the connection between the two. As an example, during one follow-on interview, a female employee noted that she objects to the position of the city that "crams DEI down our throats", but later described a situation where she was the subject of gender-based microaggressions at work. Employees throughout the City may have adopted a defense mechanism that aligns them with what they perceive as being the dominant culture as a safety protocol to avoid highlighting differences in experience and perception. In other words, it is a lot easier to be seen and act as part of the "in-group" even when some individual employees experience negative consequences.

Generally, employees are largely comfortable with being accountable for things that *they* perceive as being connected to work product. Some staff, however, lose interest in understanding the relationship between productivity and inclusive engagement with coworkers and colleagues. In terms of organizational culture as experienced by employees, the default setting for inclusion is "treat everyone the same and with respect." Many employees are open to learning and discussing issues related to DEIA, but only if they perceive those discussions as:

1. Mission critical in terms of work product;
2. Only peripherally focused on DEIA matters;
3. Avoiding acknowledgment of differences between people;
4. Individualized and private when they raise personal concerns.

Consequently, employees feel trapped in a social system and network where they can't engage in the development of relationships, groups, and affinities that challenge what they perceive to be the dominant workplace culture.¹³ This behavior also maintains the current and standard pattern which, for many employees, is frustrating but they feel powerless to change it, even when they see or experience behaviors that are detrimental to their professional or organizational success.

¹³ Ibid.

Finding 3: Some employees view DEIA as a low priority that negatively impacts accountability and work productivity.

RECOMMENDATION 8: Develop strategies to encourage employees to explore the connections between work productivity, accountability, and DEIA in ways that are private and personalized, and allow them to see the organizational value of DEI in ways they can personalize and use at work.

MICROAGGRESSIONS AND GENDER

A “microaggression”¹⁴ is a term used to describe slight verbal or small behavioral differences that can be interpreted as discriminatory. These behaviors can be intentional or unintentional. Focus groups, individual interviews, and open-ended survey questions revealed daily microaggressions that respondents either initiated themselves (not recognizing that they were expressing a microaggression) or the behavior was directed toward them. Focus group sessions revealed a series of microaggressions across multiple dimensions of diversity including race, gender, age, and disability. However, the most common descriptions of microaggressions we encountered were those directed toward women and to a lesser extent, members of the LGBTQIA+ community. Consequently, the result is the informal creation of an “other bucket” of employees who do not identify with male at birth. In other words, for many employees, there are 2 categories of people: those who were born and identify as male, and everyone else.

As a result, some employees feel marginalized, experience feelings of “otherness” at work, and may be more susceptible to continual tension between supporting people at work with different genders and gender identities. One employee shared, “Sometimes I think the culture in my department, because there are so few women, we don’t understand the needs and potential benefits different gender perspectives can bring.

¹⁴ Ding, F., Lu, J., & Riccucci, N. M. (2021). How bureaucratic representation affects public organizational performance: A meta-analysis. *Public Administration Review*, 81(6), 1003-1018.
<https://doi.org/10.1111/puar.13361>

In other cases, focus group data and responses to open ended questions on the survey revealed that women are perceived as being treated differently, and as one person put it, "not in a respectful or equitable way". Some women shared that they have been "being talked down to" based on age and gender. At the same time, we heard critical feedback from employees who raised concerns about favoritism toward women in higher level City administration positions, including director level positions. Some employees perceive that morale has been negatively impacted because of a variety of internal appointments or promotions. Some employees have the perception that there was little to no effort to seek outside candidates, and there was little to no notification of an open position that would allow internal candidates the opportunity to compete for a higher-level position.

"I get talked to like I'm a kid, despite being very intelligent and qualified for my position".

-Survey Participant

As a matter of due diligence in our assessment, we followed up with Human Resources and City leadership on this claim. The City reported that while advance notice of open positions was given, few, if any, internal candidates applied. Nonetheless, for people who are experiencing a sense of organizational distrust, their perception is their reality.

"As a person who presents as a woman, I often feel like I have to "earn" respect to be heard or simply present when men have it automatically".

-Survey Participant

Ironically, there's a double-edged sword in Ashland. First there's a perception that employees who identify as female are subject to microaggressions throughout the organization. Second, there's a perception of favoritism in appointing women to higher level positions in City government in a way that excludes other qualified candidates.

To better understand the prevalence and source of microaggressions, a series of questions was included in the survey instrument with the purpose of establishing a baseline measurement of microaggressions and gain insight on prevalence. Findings indicate that employees are more likely to experience or observe microaggressions perceived as discriminatory against gender and race with greater frequency than other diverse populations, though incidence of microaggressions are relatively infrequent overall. However, for those employees who experience the sting of a microaggression they perceive to be aimed at them, frequency is irrelevant.

“Create a safe reporting process for incidents and microaggressions. These often go unreported, or if they are reported, they are easily dismissed”.

-Survey Participant

Table 4: Employee Perceptions of Microaggressions (n = 109, expressed as percent)

<i>I have experienced or observed comments or actions I perceive as discriminatory against...</i>	Every Week	Every Month	A Few Times a Year	Almost Never	Never
Women.	1.9	7.4	13.0	37.0	40.7
People based on race or ethnicity.	1.9	0.9	8.3	31.5	57.4
People based on age.	0.9	2.8	10.1	34.9	51.4
People based on gender identity.	0.00	3.7	13.8	27.5	55.1
People with physical disabilities.	0.00	0.9	2.8	25.7	70.6
People with mental health challenges.	0.9	2.7	7.3	33.9	55.1

In a perfect world, microaggressions would never occur across all categories we tested, but this is an unrealistic expectation for any organization. In Ashland, the types of microaggression that present challenges are related primarily, but not exclusively, to women and gender identity. But every type of microaggression we tested resulted in people experiencing or observing instances at least every month. Nearly a quarter of survey participants (22 percent) reported experiencing or observing microaggressions directed toward women at least a few times a year. Over 17 percent of participants also reported experiencing or observing microaggressions directed to people based on gender identity a few times a year or more frequently.

Finding 4: Microaggressions throughout the City tend to be aimed toward people who identify as female.

RECOMMENDATION 9: Develop planned and strategic pathways to provide learning to City employees about gender and gender-identity diversity that helps employees identify stereotypes while supporting inclusive behavior.

RECOMMENDATION 10: Develop mechanisms to support a work environment where people can be confident and feel psychologically safe about gender, gender identity, gender expression, and sexual orientation and expression on their terms, mitigates risk exposure, and supports a healthy workplace.

RECOMMENDATION 11: Develop an operational policy related to behavioral expectations related to conduct and microaggressions that defines and prohibits micro-aggressive behaviors of all types. Distribute information about reporting mechanisms and graduated sanctions and penalties. Additionally, create performance metrics aimed at reducing prevalence of microaggressions across all groups.

PART 2: ORGANIZATIONAL TRUST

Fully 50 percent of employees agree or strongly agree that the City holds itself accountable for providing a fair environment that values different perspectives and experiences. At the same time, over a quarter of employees have a very different experience and feel the City fails in this respect. While trust is connected to accountability as discussed in the previous section, it also could be considered the most important element of organizational culture. Trust, respect, and inclusion are interconnected and can be looked at in multiple ways including the degree of trust employees have with their supervisors, leadership, and with each other. Trust is also an important aspect of DEIA, as it is difficult to engage in an inclusive workplace where there is a trust deficit.

DEFINITIONS OF TERMS ASSOCIATED WITH ORGANIZATIONAL ACCOUNTABILITY AND TRUST

Organizational Accountability: informal and formal mechanisms by which the organization and its leadership are held to task for what they commit to (Zheng, 2023).

Representative Bureaucracy: The theoretical argument that public organizations tend to value diversity for its potential contribution to the organizations' responsiveness to diverse needs in the general population it serves (Ding & Riccucci, 2021).

Belongingness: The belief that employees are accepted by others with whom they share similarities and the belief they are validated in their work-related beliefs and behaviors (Ashikali, Groeneveld, & Kuipers, 2021). A sense of belonging means that employees perceive that they are accepted, validated, and in the right place and the right time in terms of professional development.

Diversity Management: Organizational cognizance of the demographic composition of the workforce that promotes inclusion of workers from various backgrounds, experiences, and cultures.

Uniqueness: The perception by employees that they seek and acquire individuality in comparison with others (Ashikali, Groeneveld, & Kuipers, 2021).

Inclusion: The balance of needs of employees related to belongingness and uniqueness. In other words, inclusion is achieved when employees experience a sense of belonging that they belong to the group and are treated like an insider while retaining the opportunity to sustain and express unique identities.

Trust: The belief in the abilities, integrity, and character of another person or entity, such as a government.

High Trust Organization: An organization where employees feel safe to take risks, express themselves freely, and innovate.

TRUST BETWEEN EMPLOYEES AND THE CITY

The definition we use to conceptualize organizational accountability refers to informal and formal mechanisms by which the organization and its leadership are held to task for what they commit to employees, the community, and elected leaders.¹⁵ In this sense, we're purposefully differentiating between personal accountability as discussed in the previous section and organizational accountability and trust.

During focus group sessions, a common theme of discussion focused on what is best described as organizational trauma¹⁶ that originated at higher levels of city government including executive level positions (directors and higher) and turmoil that was generated by elected leadership several months ago and is tied to a previous configuration of City Council and other elected officials. The current City Council membership is different from previous years to include a new Mayor and slate of elected officials, is now in place. However, many staff experienced trauma stemming from the conflict between the previous City Council and City Government that has not yet been fully resolved. Symptoms of trauma for employees include fear of job stability, the perception that City employees are undervalued by the elected leaders and City executives, and as one employee stated, "you shouldn't have to be at a certain paygrade to be valued and heard". Some staff expressed concerns over mental health related to past conflict with the previous City Council.

Apart from the conflict between elected leadership and City government, employees also shared that they perceive a deterioration of trust related to fairness and equity in Human Resources (HR) processes and issues with communication and transparency. It should be noted that with new leadership in the HR Director role, past discrepancies are being steadily resolved and the City is on the path to earning back the trust of employees. Examples of trust building includes recognition of volunteer efforts that support City goals, regular communications between HR and other city Departments, and incremental but steady improvements in HR policies and processes.

TRUST BETWEEN EMPLOYEES AND DIRECT SUPERVISORS

¹⁵ Lily Zheng (2023). *DEI Deconstructed: Your No-Nonsense Guide to Doing the Work and Doing it Right*. Berrett-Koehler Publishers, Inc. Oakland, CA. p. 241.

¹⁶ Vimala Venugopal (2016). Understanding organizational trauma: A background review of types and causes. *Journal of Business and Management*. 18 (10) pp.
<https://www.iosrjournals.org/iosr-jbm/papers/Vol18-issue10/Version-7/I1810076569.pdf>.

In all focus group sessions, employees expressed their belief that their direct supervisor or City leadership were, in their view, supportive of DEIA initiatives and professional development. In nearly all cases, participants responded to this question in the affirmative. It was clear to us that employees see the value the City places on DEIA, but at the same time staffing shortages means most employees are largely focused on getting through the day as efficiently as possible, and DEIA is a lesser priority. In other words, staff are primarily, if not exclusively, focused on moving as efficiently as possible through task completion. Consequently, there may be missed opportunities to leverage organizational efficiency and effectiveness by organizing diverse and multi-disciplinary work teams. There's already a good foundation of mutual respect among employees across the organization. Organizations that approach work by looking at diversity and productivity at the same time tend to be more creative, innovative, solution oriented, and productive.¹⁷

Paradigm also learned that communication between line-level employees, supervisors, and department leadership is, in some cases, weak regarding a variety of operational challenges, including support of DEIA initiatives and activities. This may be attributed to inconsistent communication from top-level leadership but may also be an indication that focused work on DEIA is not a priority for supervisors in how they lead and manage teams. As a result, individual contributors are not provided with guidance or positive reinforcement on respectful communication, allyship, or using empathy as a skill that supports work performance.

In the survey, we examined 4 specific areas of organizational trust. First, we asked employees to rate, on a scale of less than 1 to 5, where 5 indicated strong agreement, the degree to which they perceive they are trusted by the City. Data for this question were collected using a sliding scale, which made it possible for respondents to record a score of 0 to less than 1. Then we looked at specific circumstances including trust between coworkers, trust with direct supervisors or team leads, and trust with City leadership using the same scale. It should be noted that in the case of trust in leadership, some respondents recorded a score of less than 1 which was combined with the "strongly disagreed" to construct comparative analysis.

¹⁷ Houston, L, Kraimer, M., & Schilpzand, P. (2023). The motivation to be inclusive. Understanding how diversity self-efficacy impacts leader effectiveness in racially diverse workgroups. *Group and Organizational Management*. 0 0:0 (preprint edition, retrieved from Sage Journals).

Table 4: Employee Perceptions of Trust (n = 116)

	Mean Score	Median Score	Standard Deviation
<i>I feel trusted as an employee</i>	3.95	4	1.14
<i>I trust my colleagues and coworkers</i>	3.62	4	1.12
<i>Trust Supervisors</i>	4.23	5	1.15
<i>Trust Leadership</i>	2.90	3	1.43

Most employees strongly agree or agree that they feel they are personally trusted as employees (72.4 percent of respondents) and they trust their colleagues and coworkers (58.6 percent). Nearly 60 percent of employees strongly agreed that they trust their supervisors (a trend that was noticed in other areas of the survey). However, the survey findings are not aligned with qualitative data findings that were more critical of the relationship between staff and their direct supervisor. There are 2 reasons this may have occurred:

1. Employees who participated in the survey did not feel fully confident that the survey was anonymous and there was some hesitation to report or disclose information that is critical of direct supervisors for fear information attributable to an individual employee may be reported.
2. From the employee perspective, the line between their direct supervisor and higher-level leadership within the City is blurred. For a lot of people, leadership could very possibly mean someone whose job title is higher on the organizational hierarchy than their own.

Direct supervisors hold a pivotal role in establishing and sustaining a culture of

“Supervisors who feel that DEI is not an important goal to work toward often hinder the progress overall”.

-Survey Participant

inclusion, equity, and valuing diversity in the City. First, employees will take their cue from the leader they have most direct contact with. For most positions, this is the direct supervisor, even in those cases where the direct supervisor is a department head. When supervisors do not see the value of DEIA in terms of performance or work product, this viewpoint is implicitly or explicitly passed to employees. Even if employees hold different values than

their team leads, they're likely to engage in behavior that reflects the behavior and preferences of the team lead.

Diversity management, alone, does not improve workplace performance¹⁸, and mirroring the demographic diversity of the Ashland community within the City of Ashland workforce will not, on its own, alleviate challenges related to diversity and inclusion the City currently faces. Some focus group participants and survey respondents noted that DEIA acceptance was a greater issue in the past, and they see improvements to the willingness of coworkers to accept people with different experiences and ideas, though there remains work to be done in this respect, particularly around gender inclusion. However, team leadership approaches that consider views and perspectives of staff¹⁹ combined with engaging employees in decision making about operational improvements or changes that may impact how employees engage in their jobs does make a difference, therefore improving workplace inclusion.

Employees shared with Paradigm their experiences with direct supervisors that suggests in general:

- Immediate supervisors see the value in DEIA initiatives, but the current workload prohibits proactive DEIA engagement.
- Work teams rarely discuss the connection between DEIA and team performance.
- Supervisors do not engage in strategies to strengthen inclusion as part of teamwork.

For these reasons, it is important to gather and capitalize on the support of DEIA initiatives from line level supervisors and emphasize that DEIA is not an "add-on" activity. To fully include DEIA as part of organizational culture, it is essential that it is not viewed as a desired, but unnecessary "side-dish". Lacking this work value, follow-through by employees on performance and accountability measures connected to DEIA will be challenging. In other words, if immediate supervisors do not buy-into and practice inclusive leadership strategies, it is difficult to reinforce expected behaviors of employees and the City will likely experience challenges in meeting DEIA goals and objectives.

¹⁸ Sabharwal, M. (2014). Is diversity management sufficient? Organizational inclusion to further performance. *Public Personnel Management* 43(2) 197-217.

¹⁹ Ibid.

Finding 5: Strengthening and supporting leadership skills, including conflict management, is needed to resolve team building by direct supervisors.

RECOMMENDATION 12: Enhance support and professional development to immediate supervisors about strategies to leverage inclusion that encourages individual employees to contribute to team problem solving and resolution, identify and achieve team-based performance goals, and personalize value of DEIA in achieving career progression and performance.

RECOMMENDATION 13: The City should consider identifying ways to incentivize Directors and employees with supervisory responsibilities to identify a professional development goal of:

1. Participating in a training opportunity or workshop associated with improving communication skills, DEIA, or team problem solving,
OR
2. Setting a measurable performance goal that demonstrates team collaboration and communication that utilizes strategies associated with inclusive leadership to solve a particular challenge or improve service delivery.

Communication Deficits

Some employees noted that inconsistent communication from leadership to supervisors to employees erodes trust. This speaks to transparency as an element of accountability and employees perceive the issue to be largely located at the City executive level. Employees feel that information related to how individual contributors go about their work is not always communicated to directors. This means that directors are limited in their capacity to pass critical communication to supervisors and employees.

"My biggest issue is the lack of communication when changes are made that impact people who are hands on within the job. I do not feel that employees are included or considered when decisions are made that impact how work is done."

-Focus Group Participant

Staff shared with us their perceptions that communication is inconsistent, may not occur in a timely way, and lacks transparency. In most focus groups, we heard from people who expressed frustration with the communication channels in general, but particularly from Human Resources (HR). It should, however, be noted that at the time Paradigm was collecting data about organizational culture, the City was in the midst of a significant leadership change in the Department of Human Resources. Since data were collected in December 2023, the Human Resources director has made efforts to connect with Departments on a regular basis and has implemented processes that we characterize as “people first, human centered”. While it is not possible to ascertain the impact of these efforts at this point, we recognize the value and believe that the work the Department of Human Resources is doing to improve transparency and communication will result in improvements to organizational culture.

Employees perceive that opportunities for hiring or promotion are not clearly communicated, if at all. Employees reported that they lack the basic resources from HR to do their job well, including information about the structure and job roles of other employees and guidance on performance expectations and evaluations. The City recognizes that in the relative recent past, this may have been the case because the HR director role was vacant for an extended period of time. Since a new leader has taken the helm, there have been significant improvements to communication including a more active effort by the HR department to communicate with staff across various means and media, scheduled visits by HR to Departments for discussions and information on HR topics, efforts to acknowledge and appreciate efforts by staff to advance organizational goals, and creating space and time for employees to engage with one another in social settings to build relationships.

Employees across the city have felt the impacts of a long vacancy in the HR Director role. Early in the assessment process we learned about concerns from some staff that they do not have access to an Employee Guidebook document that consolidates and clarifies the operational policies, behavioral, and performance expectations of employees. Staff also raised concerns that they couldn’t find resources, connect with co-workers, or anticipate a timely performance review. Though new employees receive a “new hire packet” that includes information about HR policies and expectations, this information may not be up-to-date and fully accurate.

Many employees, however, do not recall receiving such a document, and from what we were able to ascertain, there is no formal policy guidance that supports the full workforce, regardless of whether individual contributors are part of a collective bargaining agreement. This also means that the conditions of employment,

expectations, and performance evaluation procedures are vague or non-existent. This chips away at transparency and trust between employees and the City. Directors and City management believe they are doing their part in communicating important policy or operational changes with the expectation that a downstream cascade of information from the City Manager and/or directors to individual immediate supervisors who then share information with employees.

In all fairness, the Human Resources Department has been operating without a fulltime director for several months. The current HR Director is working to resolve some of the issues with lack of policy structure and transparency, but from the employee perspective, change cannot happen fast enough. We are also aware that the City has struggled to recruit external candidates to apply for open leadership positions. As some employees explained to us, in part this happened because the City experienced some reputational damage among professionals and employees in other municipalities in the region largely as a result of the previous City Council's activities and public criticism of Ashland staff. That said, there is a new Council now, new and emerging leadership in the City, and people who do the work of the people with a willingness to learn, work hard, and support an inclusive government. Despite what may have happened in the past, this new vision is the Ashland of the future.

In addition to staying the course to resolve the challenges of the past several months, the Paradigm Team found that there are few mechanisms that support an upstream communication flow from individual contributors to higher level leadership within City government. The result of this is that employees do not always feel heard by City leadership or valued, and City leadership does not gain the benefit of decision making and problem resolution that considers multiple perspectives and experiences. Furthermore, when the communication flow stops at the immediate supervisor level, bridging the communication gap between high-level leadership and employees is difficult.

Finding 6: Communication deficits erode trust which weakens trust between employees, supervisors, and City leadership.

RECOMMENDATION 14: City leadership and immediate supervisors should collaborate with each other about identifying where communication gaps may be occurring, then construct a communication strategy to ensure critical information flows downstream to staff in a clear and timely way. This communication strategy may

include touchpoints within the communication flow that requires signature (e.g., director, supervisor, employee) for mission critical communications.

RECOMMENDATION 15: Consider the development of establishing two-way communication mechanisms for staff to engage directly with directors and City leadership. Options may include exploring technologies that allow for anonymous reporting (e.g., fraud and abuse reporting technology), and greater opportunities for direct communication between employees, directors, and city executive leadership.

RECOMMENDATION 16: Update and develop a comprehensive Employee Handbook that includes all current policies and regulations that pertain to employee experience throughout the full employment life cycle from recruitment and selection to retirement, including succession planning. Update this book at least biannually, and consider distributing through multiple formats (e.g., web-based, paper, or optimized for tablets and remote devices).

TRUST BETWEEN EMPLOYEES AND THE LEADERSHIP TEAM

Survey results indicated the percentage of employees who agree or strongly agree that they trust leadership (that is the City Manager, Deputy City Manager, and Directors) holds at approximately one-third (33.9 percent) of survey participants who responded to this question. Alternatively, slightly over 20 percent (20.9%) of employees participating in the survey responded to the question in what could be characterized as “intensely disagreed” with a reported rating of 0 to 1 on a 5-point scale. Another 16.5 percent of people who answered this survey question noted disagreement with the statement that they trust leadership. We are confident that, from the perspective of staff, there is an organizational deficit of trust between individual contributors and upper-level leadership.

Feedback regarding the survey from participants offered some insight about the relationship between employees and leadership. In terms of the question that defined leadership as the City Manager, Deputy City Manager, and Directors, some survey participants noted that they believed this question should be disaggregated because they have strong and trusting relationships with their Director, but not as much with the executive leadership of the City. Furthermore, among focus group participants and people who engaged in a 1-on-1 interview, we heard strong support for the Deputy City manager (currently the Interim City Manager), though there was also criticism from

a minority of employees. We also noted that the size of the workforce is relatively small in some departments, and therefore, the immediate supervisor for some employees is their director. With these exceptions noted, combined with information gleaned from individual interviews and focus group discussions, we believe the source of organizational distrust primarily lies within the ranks of City executive leadership.

Perhaps more to the point, employees perceive that while the relationship between City government and elected officials is improving, the crisis of trust caused by the previous configuration of elected officials has some lingering impacts for employees that have yet to be fully resolved. It is also worth noting that during our site visit, the City Manager at the time vacated his position, which contributed to further unrest among the employees which may have impacted later responses to the survey. As we were in the middle of data collection when the City Manager resigned his position, it wasn't clear if employees were voicing concerns about the departing City Manager or current executive leadership.

Members of the Leadership Team, including City executives and directors, have important roles in capitalizing on support of DEIA initiatives from line-level supervisors. Lacking this support, organizational development and follow-through on performance and accountability measures connected to DEIA will be challenging in the future. We recommend that for City Executives and Directors to rebuild and restore trust with employees, the City should consider a strategy to move beyond diversity management and toward inclusive leadership.

Key elements of this strategy may include:

1. City managers and directors move from a passive position (valuing diversity) to an action-oriented approach focused on diversity management, which in turn, eventually supports inclusive leadership strategies.
2. Strategies for inclusive management to consider may include:
 - a. Mentoring programs,
 - b. Succession planning,
 - c. Family-friendly programs,
 - d. Alternative work arrangements or work/life balance scheduling, when possible, to maintain and support City operations with the caveat that not all staff will be eligible for alternative work arrangements because of the nature of their work,

- e. Development of goals and accountability metrics and measurement that connect to mid- and long-range inclusive goals for the City, and,
- f. Improving recruitment, selection, and retention of staff throughout City government by focusing on needs and expectations of new and emerging generations of leaders and workers.

It is important to note that singular strategies need to be connected to an overall vision on building sustainable processes of inclusion and performance throughout the City. Policies such as mentoring and alternative work arrangements are important leadership efforts, but they are not always successful if top-level organizational leadership do not support them, or implementation is not followed through by immediate supervisors.²⁰

When this happens, employees participating in these programs may experience backlash or be viewed as being singled out by other employees. For the City of Ashland, there is a particularly high risk of this occurring as many employees shared concerns that there is a wide belief among employees that some people rose to leadership roles by appointment rather than a competitive process open to other internal and external candidates. In terms of planning, before engaging in inclusive leadership strategies that are built from diversity management needs, we recommend that top-level City leadership first engage in a meaningful leadership alignment process that helps leaders gain insight about the value of DEIA and trust building throughout the organization, how to measure it, and how to hold themselves and others accountable.

Finding 7: City leadership should clarify and define goals, objectives, and metrics with a focus on measurement and planned incremental change for the future.

RECOMMENDATION 17: Engage in a leadership alignment process to identify goals, objectives, and measures from the perspective of leaders that support building a culture of inclusion and organizational belongingness at the City of Ashland. As an example, this process may follow this structure, but elements and areas of focus should be unique to City needs.

²⁰ Sabharwal, M. (2014). Is diversity management sufficient? Organizational Inclusion to further performance. *Public Personnel Management*, 43(2); 197-217.

Leadership Values Alignment Model



RECOMMENDATION 18: Conduct a gap analysis and design a strategy to connect employee perceptions of trust and accountability (see Recommendation 14) and results from leadership alignment (Recommendation 17). Utilize this strategy as part of the City's strategy for DEI sustainability.

DIVERSITY MANAGEMENT VERSUS INCLUSIVE LEADERSHIP

While there is evidence that staff do not always see the difference between diversity management (that is attention to specific demographic affinity groups such as gender, race, ethnicity, disability among others) and inclusion, the City itself has taken a close look at the utility of diversity management. Based on our assessment of inclusion throughout city government, we believe a shift of strategy that focuses more on inclusion than diversity may alleviate some problems related to building trust throughout Ashland government. We make this recommendation with 2 caveats:

1. As mentioned previously in this section, there is a significant lack of parity in gender representation between the community of Ashland and City government that needs to be addressed, including deterrence and management of gender-based microaggressions.

2. As Part III will discuss in greater detail, there are important findings about employee perceptions of comfort related to race and gender identity that may require resolution apart from the overall recommended strategy of inclusion management for leaders.

The Leadership Team of the City is primarily responsible for creating and sustaining diverse, equitable departments and instilling and sustaining a culture that values diversity and inclusion that connects to performance management of inclusive internal policies that support valuing different perspectives, experiences, and ideas from a variety of levels of staff throughout the City.

Finding 8: Shift attention toward strategies that focus on inclusive leadership and away from diversity management.

RECOMMENDATION 19: In order to strengthen trust, the City Leadership Team should move toward inclusion leadership with an emphasis on sustaining a productive workplace where employees are encouraged to express their opinions, and input is sought before important organizational decision making in a manner that supports voice, perspective, and involvement of all employees, including those with different perspectives including race, ethnicity, age, gender, gender identity, and disability as a long-range goal and strategy rather than focusing on diversity management.

PART 3: ORGANIZATIONAL COMFORT, WELCOMENESS, AND RESPECT

Organizational comfort, welcomeness, and accountability are interrelated concepts that point toward creating a sustainable work environment where people are willingly and actively engaged in their work in a way that supports, welcomes, and invites people with different ideas, perspectives, and experiences to support problem resolution and innovation. High levels of organizational comfort, welcomeness, respect, and accountability are all markers of high-performance teams and work cultures where people are inspired and engaged in their work.

DEFINITIONS OF TERMS ASSOCIATED WITH ORGANIZATIONAL COMFORT, WELCOMENESS, AND RESPECT

Organizational Comfort: a work environment where people feel safe and valued because of their experiences and perceptions, not despite them.

Organizational Welcomeness: the degree to which an organization's culture, policies, and practices facilitate the integration of new employees into the workplace and impact the organization's ability to retain new talent and provide a supportive environment and opportunities for career progression.

Psychological Safety: The group level belief that employees can express ideas, concerns, ask questions, and admit mistakes without fear of unjust negative consequences. While the act of speaking up is an individual trait, it is the group values and characteristics that creates and sustains organizational safety.

Accountability: Willingly accepting responsibility for one's own actions and accomplishing the things you set out to do at work that may include tasks, projects, or the way employees interact with each other and the community.

Organizational Accountability: A type of accountability that is associated with organizational goals and is not associated with punishment, retaliation, or repercussions. Organizational accountability means setting a high bar for performance that builds on positive morale, growth, and organizational culture.

ORGANIZATIONAL COMFORT

The Paradigm Team collected survey data that described whether employees have experienced discomfort based on various elements of diversity including age, race or ethnicity, sexual orientation, gender or gender identity, religion, socioeconomic status, or dis/ability. For each of these characteristics we found that most people **have not** experienced a sense of uncomfortableness based on the dimensions of diversity we measured. Table 5 provides detailed information about each of these measures. In some cases, respondents skipped this question entirely, which means that self-selection bias may occur. In other words, data analysis is based only on the participants who chose to answer these questions and may not reflect all survey participants or the overall workforce.

Table 5: Employee Perceptions of Organizational Comfort (n = 109, expressed as a percentage)

	Highly Comfortable	Comfortable	Neutral	Uncomfortable	Highly Uncomfortable
Age	35.8	35.8	19.3	4.6	2.7
Race/Ethnicity	40.4	32.1	10.1	6.4	0.9
Sexual Orientation	40.4	33.9	11.9	0.0	2.7
Gender or Gender Identity	37.6	31.2	14.7	6.4	4.9
Socioeconomic Status	37.6	37.6	14.7	2.7	1.8
Dis/Ability	36.7	34.9	11.9	0.9	2.7
Religion	38.5	33.9	14.7	1.8	2.7

In terms of values and behaviors to retain, survey results indicate that most employees expressed a degree of comfort related to sexual orientation (but not gender or gender identity). In terms of opportunities to strengthen organizational comfort, we are calling out gender and/or gender identity because it is the only category where more than 10 percent of participants noted an uncomfortable or highly uncomfortable climate. It is also worth noting that in terms of race and ethnicity, nearly 7.5 percent of participants noted discomfort.

In a deeper exploration of the data that looked at elements of diversity and responses to each of these questions, we did not identify any notable trends in the data, though

in some cases, it did appear that when a respondent identified with an element of diversity, that person was more likely to note a level of discomfort for the same. However, it is important to note that the small number of people for some identity groups means that there is a risk of identifying a participant or because of the small "n" and the result was not statistically significant. Therefore, from an analytic perspective, we cannot offer a statistically reliable comment on certain demographics among the workforce and perceptions of discomfort. This limitation applies to:

- Nonwhite people on discomfort related to race or ethnicity.
- Nonbinary people or people who identify as non-cis-gender, that is people who identify with a gender that is different than the one assigned at birth, on discomfort related to gender or sexual orientation.
- People who experience a disability on discomfort related to disability.

With that said, survey results indicated in each of the cases noted above, people experienced discomfort based on elements of diversity they identify with. We cannot draw conclusions with statistical certainty that non-white people have experienced discomfort based on race; non-binary or gender non-conforming people have experienced discomfort based on gender, gender identity, or sexual orientation; or people with disabilities have experienced discomfort related to disability. We did, however, observe that in every one of these categories, one or more people identified discomfort. This suggests to us that from an organizational culture perspective there is not obvious or rampant discomfort for people who identify with any given element of diversity, there are instances where some people among the workforce experience discomfort based on real or perceived affiliation with an identity group.

It is important to note that we looked at race, ethnicity, gender orientation and gender identity to determine the relationship between identity and perceptions of comfort specifically an exploration of whether participants who are Black/African American are more likely to experience discomfort related to race, whether gender nonconforming employees are more likely to experience discomfort related to gender identity, and whether women are more likely to experience discomfort around gender.

As mentioned in earlier portions of this report the "small n" of these subgroups prevents us from reporting specific findings because of the risk of inadvertently disclosing personally identifiable information about participants. However, when we examined the overall average score for "The City of Ashland is a comfortable place to be and work", the weighted average that considers only the number of people who responded to the question, the score rises to 3.7. Nonetheless, for some employees,

the City is not a comfortable place to work, and this creates opportunity for improvement.

Overall, about 140 employees participated in the survey, but only 104 (or about 74 percent) self-identified race and/or gender identity. This means that we do not have demographic data related to race, ethnicity, gender, or gender identity for a quarter of survey participants. We looked at this subgroup of participants as a separate subsection of survey participants. In other words, we treated those who did not identify race, ethnicity, gender, or gender identity as a stand-alone sub-group. The result is that the mean score on the “overall comfort at work” subscale is 2.82. This score is below neutral and in the territory of “uncomfortable to highly uncomfortable”. As a result, we are not able to say within the boundaries of statistical confidence that failure to identify race, ethnicity, gender, or gender identity results in a statistically significant difference from the overall group.

There is not a reliable way to estimate the number or percent of those who did not report race, ethnicity, gender, or gender identity as fitting into a category of race, ethnicity, gender, or gender identity without violating our promise of anonymity of this survey. We interpreted this to mean that there were a good number of people, about 25 percent of participants, who felt they had something important to say about organizational comfort but did not want to risk having their survey responses tied to them personally. Simply stated, they did not want to provide too much information they felt would personally identify them.

Many participants noted this in the open-ended questions of the survey. For example, one open ended question asked participants to tell us anything else they thought we should know about DEI and belonging at the City and emphasized that survey responses are anonymous. We found many comments that simply stated, “I don’t think this survey is anonymous” or suggested that there are nefarious purposes behind this assessment. We also found that people who left comments like expressing skepticism about anonymity seemed to be less likely to identify race, ethnicity, gender, or gender identity.

Qualitative and quantitative evidence suggests that people who are gender-nonconforming, LGBTQIA+, or identify as women are more likely to experience organizational discomfort compared to other employees.

In the end, we concluded that given the totality of evidence and analytic methods that included an assessment of qualitative data through focus groups, interviews, and

responses to open-ended survey questions combined with quantitative analysis that included an examination of descriptive statistics, construction of a series of pivot tables, and measures of central tendency, that people who identify as Black American or non-Euro-American **do not have** a very different experience at work related to comfort and inclusion than the dominant Euro-American, male culture. Though we found no evidence in either the qualitative or quantitative data we analyzed does not necessarily mean that discomfort doesn't exist. It may just mean that people didn't self-report it to us. However, there is evidence to suggest that people who are gender-nonconforming, LGBTQIA+²¹, or identify as women are somewhat more likely to experience organizational discomfort compared to other employees.

We believe this phenomenon to be tied to organizational trust and trust of City leadership given the relatively low sub-measures in these two areas. People who are experiencing discomfort at work are hesitant to reach out or help or support at the risk of identifying themselves. This means they are also unlikely to request accommodation or remedy for which they may be entitled under law and public or operational policy. The experiences of City employees who are not Euro-American are nuanced, shielded, and are not openly expressed.

We did identify elements of trust and comfort that are improving. That employees are willing to share their perceptions at all, is an indicator to us that trust is growing throughout the City. We attribute this to two factors: First, while some employees disagree with the selection process for staff in the Human Resources Department, there are improvements in opportunities for employees to reach out when they need to, and recent hiring and recruitment efforts have resulted in approximately 75 new hires since the current Director of Human Resources took the lead. Second, City leadership, both appointed and elected, have emphasized and prioritized DEI as an organizational value, and in our experience with the City of Ashland, we see the proverbial needle moving slowly but steadily in a positive direction. However, understanding the experiences, needs, and perspectives of people with racial, ethnic, or gender related differences from the primarily White and male culture is important in terms of developing a wholly inclusive workforce.

²¹ LGBTQIA+ is an acronym that stands for Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, Asexual, and gender non-conforming. It is worth noting that there is robust discussion in gender identity groups about the appropriateness of creating an acronym that includes all non-heterosexual identities as it fails to recognize the differences between experiences and perceptions associated with gender and sexuality.

Finding 9: Impediments to a psychologically safe work environment are connected to race, ethnicity, gender, and gender identity.

RECOMMENDATION 20: Continue efforts to encourage respect and value the differences among the workforce that includes developing strategies to create opportunities for learning, sharing, and understanding that the strength that diversity and inclusion has on the work experience and organizational trust.

RECOMMENDATION 21: Provide additional support to direct supervisors related to recognizing and valuing differences among their team, including education on recognizing the early signs of conflict and effective conflict management that supports early identification and resolution.

RECOMMENDATION 22: Readminister the Culture and Belonging survey (minimally, the construct of organizational comfort) no sooner than one year from the release of this report to determine whether measurable change has occurred related to comfort and trust.

ORGANIZATIONAL WELCOMENESS

Organizational welcomeness is slightly different from organizational comfort and refers to the degree to which an organization's culture, policies, and practices facilitate the integration of new employees into the workplace and impact the City's ability to retain new talent. For the City of Ashland, this is particularly important because despite recent success in onboarding approximately 75 employees, the City is experiencing staffing shortages across most, if not all, Departments. Growth and development throughout the Ashland community means additional employees will be needed in the future to accommodate a growing community. Leveraging the element of welcomeness is essential to recruiting a new generation of employees, many of whom are looking to social media to make an assessment about organizational fit that for many prospective employees means a look at commitment to diversity, equity, and inclusion.

Many factors can influence organizational welcomeness, including culture, values, norms, and expectations, degree of social support, and an overall sense of inclusion. A welcoming organization creates a work environment that is characterized by trust,

respect, and openness. Welcomeness is a critical aspect of employee engagement and retention because it significantly impacts an employee's sense of belonging, commitment, and in the long run, job satisfaction. While there are many aspects of organizational welcomeness, we focused on those most closely connected to diversity, equity, inclusion, and access. Table 6 describes survey participant's perceptions related to the connection between elements of diversity among the workforce and organizational welcomeness.

Table 6: Employee Perceptions of Welcomeness (n = 109, expressed as a percentage)

<i>I believe the City of Ashland is a Welcoming Place Based on...</i>	Agree	Neutral	Disagree
<i>Race and/or ethnicity</i>	73.2	14.8	8.4
<i>People of all sexes</i>	73.4	13.8	8.2
<i>People of all gender identities</i>	61.4	25.7	7.3
<i>People regardless of age</i>	78.9	12.8	5.5
<i>People from different socioeconomic statuses</i>	76.1	14.7	6.4
<i>Disability (physical, learning, emotional, psychological)</i>	69.8	22.0	5.5
<i>I believe DEI makes the City of Ashland a better place to work.</i>	67.0	15.6	13.7

Totals may not equal 100 because of rounding.

There are some notable differences in comparing welcomeness to organizational comfort. First, in terms of welcomeness, race, sex, age, and socioeconomic status are the dimensions of diversity where employees are more likely to feel a sense of welcomeness as compared to sexual orientation and disability/ability as measures of comfort. In making decisions about organizational welcomeness, it is important to note that findings and recommendations related to race, gender, and gender identity related to organizational comfort, also apply to organizational welcomeness, and likely moderate the relationship some people who are Black, Latine', female, or gender non-conforming. Similarly, though, gender identity is a dimension of diversity where employees are less likely to feel comfortable or welcome. It is also significant that over 13 percent of employees who participated in the survey disagree or strongly disagree with the notion that DEIA makes Ashland a better place to work, which creates opportunities solidify DEIA as an important part of organizational culture in the City of Ashland.

As part of our analysis, we also tested whether the perception that DEIA makes the City of Ashland a better place to work impacted overall perceptions of welcomeness and found that it **did not** have a statistically significant impact on welcomeness. In other words, from the perspective of employees, DEIA initiatives, though perceived by new employees, emerging leaders, and many others as having a positive impact on organizational culture, does not statistically impact organizational welcomeness.

In terms of welcomeness, improvements may have a measurable impact on recruitment and selection. Organizational socialization and outcomes for new employees are strong factors in job satisfaction, organizational commitment, and job performance.²² Furthermore, a survey by Deloitte found that younger workers are more likely to prioritize DEI when evaluating potential employers. For example, Deloitte's survey found that among Millennial and Gen Z workers, over 75 percent said that an organization's diversity, equity, and inclusion policies are important when deciding where to work.²³ The City's ability to retain new employees may be dependent upon a work culture that sustains welcomeness and comfort, particularly as related to DEIA. This may be particularly important as the City sees growth in recruitment pools of Gen Z and Millennial job seekers. Nationally, nearly 70 percent of these generations combined said a diverse and inclusive workplace is important to them, and over 55 percent reported turning down a job offer because they did not feel the organization was sufficiently committed to diversity, equity, and inclusion.²⁴

The Bureau of Labor Statistics reported approximately 526,000 vacancies in state and local government in October 2023, yet only 157,000 hires.²⁵ In other words, across the nation, there are about 1.5 government sector vacancies for every 1 applicant. Like we heard from City of Ashland leaders, recent research suggests that about three-quarters of public sector HR directors reported an insufficient number of qualified applicants for open positions, which in turn leads to burnout for those who are sustaining employment. New employees in government want a different set of benefits beyond traditional compensation packages with pensions and good health insurance coverage.

²² Liang, J., Farh, C.I.C., & Farh, J.L. (2012) Psychological antecedents of promotive and prohibitive voice. A two-wave examination. *Academy of Management Journal*, 55(1), 71-92.

²³ Deloitte. (2018) The millennial survey 2018. Retrieved from <https://www2.deloitte.com/global/en/pages/about-deloitte/articles/millennialsurvey.html>.

²⁴ McKinsey & Company (2021). Diversity wins: How inclusion matters. Retrieved from <https://www.mckinsey.com/>.

²⁵ Lavigna, B. (Dec. 2015). What job seekers want – and how government can deliver. Retrieved from https://icma.org/blog-posts/what-job-seekers-want-and-how-government-can-deliver?_zs=SxPSm1&_zl=xnpM9.

They seek flexibility, additional time off, and when possible, remote work options. For Ashland to remain competitive and attract highly qualified candidates, rethinking components of a full-compensation package may help attract and retain a qualified and diverse slate of candidates for open positions.

Finding 10: Most employees perceive the City as welcoming, but there are some barriers.

RECOMMENDATION 23: Develop a recruitment and retention strategy that leverages the strengths of appealing to new employees through non-conventional compensation packages. At the same time, develop strategies to strengthen organizational commitment related to multiple elements of diversity that may improve retention of employees and create avenues for diverse recruitment strategies including greater use of advanced technologies and social media.

RESPECT and CLIMATE

The construct of respect focused on the degree to which employees feel respected, perceive the City to support an organizationally comfortable place to work, and the degree to which people feel they are treated fairly. Trust and respect are typically highly correlated, but we see them as different measures. For example, one of the elements we collected data about in this construct focused on the degree to which employees respect their direct supervisor where one of the measures is that employees can disagree without fear of retaliation. Combined, these measures speak to psychological safety at work.

One way to think about the difference between trust and respect is that respect encompasses feelings of high regard for someone. Respect also guides how employees and staff ideally interact with one another in the work environment, and therefore is reciprocal. Staff who respect their supervisors reasonably expect that supervisors respect them. We think of respect as a sub-measure and cornerstone of trust as discussed in Part II of this report. Employee perceptions of respect at work can be better understood by a closer examination of the frequency of responses for each individual element of respect.

Table 7: Employee Perceptions of Respect by percentage (n =109, expressed as a percentage)

	Agree	Neutral	Disagree
<i>I feel respected at the City of Ashland</i>	70.6	15.6	13.7
<i>I feel comfortable with the climate related to DEIA</i>	68.8	20.2	11.0
<i>I am able to disagree with my supervisor without fear of retaliation</i>	73.1	11.1	15.8
<i>I respect my direct supervisor</i>	87.8	5.6	6.5
<i>I respect City Leadership</i>	58.4	23.2	18.6
<i>I feel my performance is fairly evaluated</i>	58.3	24.1	17.6

While most employees feel respected (about 70 percent) about 13 percent do not. The reasons for feeling (or not feeling) trusted are not known, but qualitative responses provide some clues. One employee shared that “I fully trust my direct supervisor; however, I have seen [another department leader] bully employees and nothing is done about this”.

A closer look at the elements of workplace respect revealed an interesting paradox. Most employees feel respected, comfortable with the current DEIA climate (about 69 percent) and hold respect for supervisors including the sense they can disagree with their supervisors without fear of retaliation (over 73 percent). While nearly three-quarters of people who responded to this survey question agreed or strongly agreed that they can disagree with their supervisor without fear of retaliation, many employees (over 15 percent) have a very different experience with their supervisors. The sub-measure of fear of retaliation is among the highest percentages of disagreement. In other words, while most people perceive that they can disagree with their supervisor, a significant number may fear retaliation. Nearly 20 percent of participants feel their performance is unfairly evaluated. This occurrence provides some insight as to why there may be a trust deficit overall from the perspective of employees.

This finding connects to narratives heard in focus groups. Some employees, notably women and people who identify as female, presented accounts of their experiences where they feel they were treated unfairly by supervisors or were adversely impacted because of their sex or gender identity. Through conversations and interviews, we learned that some employees view retaliation in much broader terms that may extend beyond protected status to include actions such as team reassignment, being assigned

undesirable tasks, or even discussions about performance and performance improvement.

The U. S. Department of Labor defines retaliation as a manager, supervisor, or administrator fires an employee or takes other type of adverse action against an employee for engaging in a protected activity, meaning that employees assert their rights to be free from employment discrimination.²⁶ Throughout our assessment, we found no evidence of retaliation as defined by the US Department of Labor or the Equal Employment Opportunity Commission. Instead, we believe this may be an indicator that while employees respect their supervisors and their ability to make decisions about day-to-day work assignments, they don't always trust their supervisors to make decisions that employees see as benefiting them directly.

Finding 11: Some employees fear retaliation by supervisors or leadership, but not as defined by Federal or State labor laws.

RECOMMENDATION 24: We did not identify any incidents of retaliation as defined by federal or state law through our assessment process. As such, we make no recommendations related to legal retaliation, but view the perceptions of staff as indicators of lower than ideal levels of trust in terms of decision making that benefits employees directly. We refer to recommendations related to trust and team building in Part II of this report for specific strategies.

TRUST AS AN INDICATOR OF ORGANIZATIONAL RESPECT

Survey results revealed that most employees (over 90 percent) **respect** their supervisor. There's a similar comparison to the percentage of employees who **trust** their supervisor, about 88 percent. We also heard from many employees about the great level of trust they have in direct supervisors, more in some departments over others. The level of trust between employees and direct supervisors is high, and there seems to be a sense that employees generally feel that their supervisor is the person that makes them feel safe, valued, and protected from external uncertainty or public discourse.

²⁶ For more information about EEOC facts and definitions of employment retaliation, see <https://www.eeoc.gov/facts-about-retaliation>.

Supervisors are held in high regard by staff, teams, and work crews. Furthermore, supervisors are equally trusted by employees to make good decisions that are fair and beneficial to them, though there were some exceptions as noted in the previous section. The high convergence of trust and respect employees hold for their supervisors creates an important opportunity for supervisors to lead the charge of creating and sustaining a DEIA focused organizational culture. When staff members work on a team that is led by someone who sees value in DEIA, building an organizational culture of inclusion is accelerated. It also means that when supervisors do not see the value in DEIA, they won't practice strategies associated with inclusion, and their teams won't, either.

Supervisors are key to connecting employees with executive City leadership to build and restore trust. They also can build other DEIA-focused relationships that may include supporting respectful and empathetic communication with each other and the community and gradually acknowledging the value of respecting perspectives and experiences of diverse people throughout City of Ashland government.

Finding 12: High levels of trust and respect for supervisors throughout the organization creates opportunity to strengthen DEIA as part of organizational culture.

RECOMMENDATION 25: Develop strategies and provide support for supervisors to facilitate building from the foundation and culture of trust staff have with their immediate supervisor by developing strategies to strengthen DEIA acceptance and practice throughout the City.

CONCLUSION AND NEXT STEPS

The real value of this assessment is that City leadership openly sought the perspectives and viewpoints of employees related to organizational culture, diversity, equity, inclusion, and access. By taking this step, the City as an entity, leaders, and employees exhibited extraordinary courage and vulnerability during a time that followed significant organizational trauma and leadership change. A marker of an inclusive organization is one that is willing to peel back the layers of organizational culture and be open to critical review and feedback. With this in mind, we see great promise for creating and sustaining inclusion as a part of organizational culture at the City of Ashland well into the future.

The people who make the City of Ashland what it is now and what it can be in the future were candid, frank, and unfiltered. They expressed some frustrations about transparency – and doubt – that change will occur because of this project. As outside observers, we have less doubt. The key to being successful with staff is sharing the results of this project, and then moving forward with planned and strategic change. We offer this general guidance.

1. Avoid administering surveys or other major data collection efforts for at least a year. People are experiencing survey fatigue, and when those surveys connect to DEIA, they're experiencing DEIA fatigue.
2. Continue with collegial programs and efforts that highlight and celebrate the diversity in the workforce and community. Positive reinforcement of DEIA values and perspectives will likely result in greater long-term gains than negative reinforcement.
3. Create opportunities for all staff to be part of the vision and strategy for enhancing DEIA throughout the organization. Focus on ways for employees to exhibit DEIA acceptance and advocacy on their terms but remain inclusive of everyone.
4. Recognize that change is hard – DEIA change is harder. Some members of the workforce who are part of the "dominant culture" may feel disconnected and not included as part of the City. As one person said, "DEI tends to make me feel unfairly judged... DEI asks us to focus too much on what makes us different instead of our common work goals". This is a sentiment we hear often. Find ways to make all employees, even those who disagree, feel heard and valued.

Finally, employees are working toward recovering from what can best be described as organizational trauma. This trauma is the result of very public discourse about City management, leadership, and even individual contributors that has instilled a deep sense of distrust with some important political processes in Ashland. As a result, City leadership is working on improving DEIA from a disadvantage because they can't fully tap into the talent that already exists. Consequently, innovation and productivity suffers, and recruitment of new employees to public service in Ashland may present challenges because of a public perception that DEIA efforts may be more performative than authentic. We also heard that the reputation of the City as a place of employment has been damaged which negatively impacts your ability to identify and recruit leadership and critical public service jobs.

We also noticed a trend over the past 3-4 months where the City has made important efforts to be transparent with the public, engage in outreach campaigns, and rebuild trust with the Ashland community through strategically planned and transparent social media. We encourage you to keep this work up, and include information about DEIA initiatives as prospective employees are looking for this kind of connection in places they want to build careers.

In closing, the Paradigm Team wants to assure the City that we have faith and confidence in your efforts and work thus far. In many important ways, the City of Ashland is far ahead of the curve in terms of valuing diversity and inclusion. We see the same hope and opportunity the current City leadership does – a community where all perspectives are recognized, valued, and a City government where people are free to be themselves while still accepting and respecting all the things that make us similar and different from one another.

Appendix A: Survey Results Summary

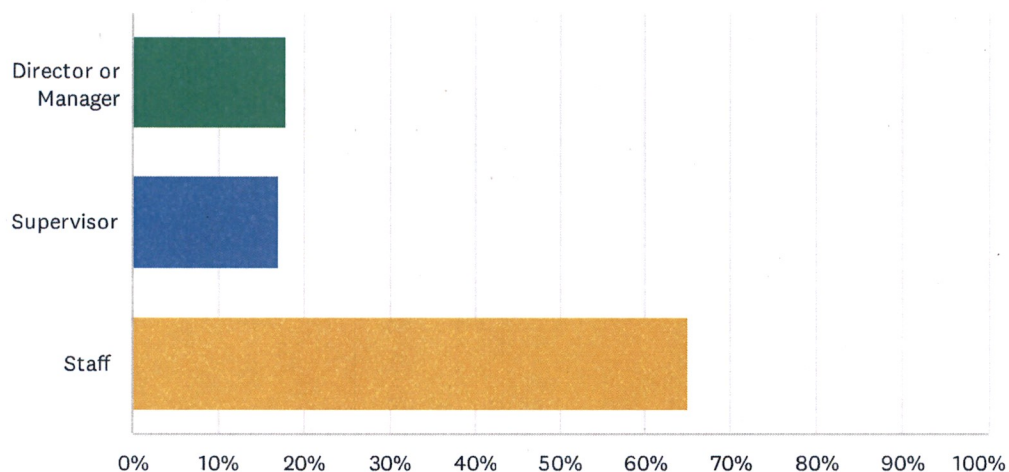
Q1 Please select the Department or functional area you primarily work with the City of Ashland.

Answered: 138 Skipped: 2

ANSWER CHOICES	RESPONSES	
Administration	5.07%	7
Office of the City Recorder	0.00%	0
Communications and/or Marketing	0.72%	1
Community Development	9.42%	13
Electric	8.70%	12
Finance	7.25%	10
Fire	18.12%	25
Human Resources	1.45%	2
Information Technology	6.52%	9
Municipal Court	1.45%	2
Parks and Recreation	12.32%	17
Police	12.32%	17
Public Works	16.67%	23
TOTAL		138

Q2 My role with the City of Ashland is best described as:

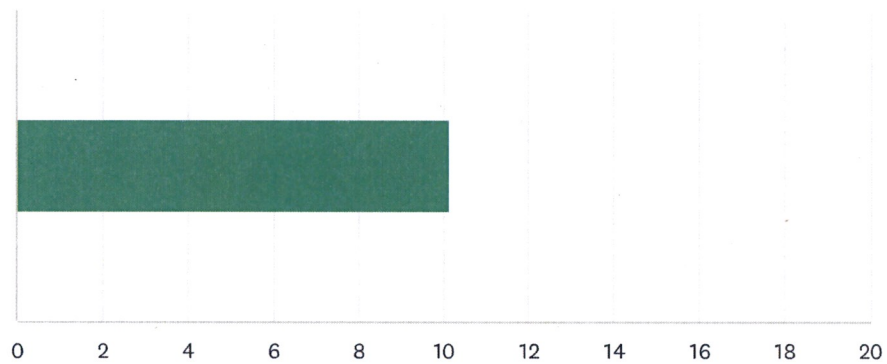
Answered: 140 Skipped: 0



ANSWER CHOICES	RESPONSES	
Director or Manager	17.86%	25
Supervisor	17.14%	24
Staff	65.00%	91
TOTAL		140

Q3 Using the slider below, tell us how long (in years) you've been employed at the City of Ashland.

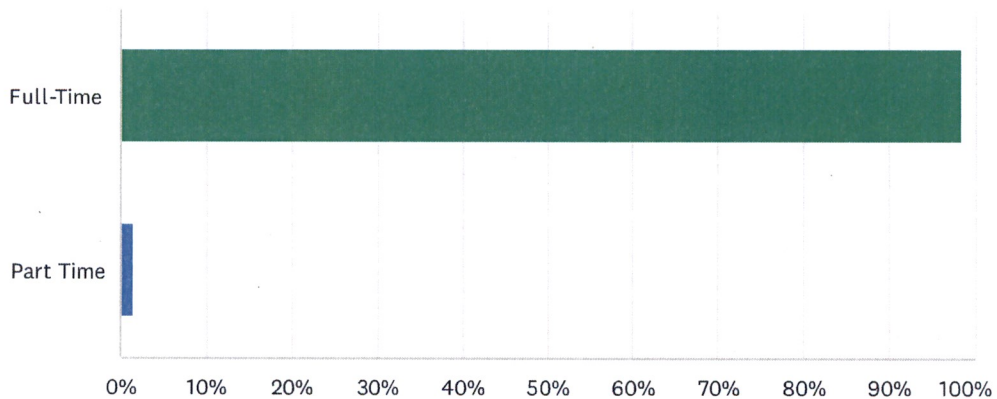
Answered: 134 Skipped: 6



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	10	1,358	134
Total Respondents: 134			

Q4 Which best describes your current position, part time or full-time.

Answered: 137 Skipped: 3



ANSWER CHOICES	RESPONSES	
Full-Time	98.54%	135
Part Time	1.46%	2
TOTAL		137

Q5 These questions focus on work values of the City. For each statement, select the one option that most closely matches your experience or perception.

Answered: 116 Skipped: 24

	STRONGLY AGREE (1)	AGREE (2)	NEITHER AGREE NOR DISAGREE (3)	DISAGREE (4)	STRONGLY DISAGREE (5)	N/A	TOTAL	WEIGHTED AVERAGE
We place great value on coordinating among different work teams	6.90% 8	48.28% 56	23.28% 27	18.97% 22	2.59% 3	0.00% 0	116	3.38
We place great value on every employee being proactive in their role.	12.07% 14	44.83% 52	22.41% 26	18.10% 21	2.59% 3	0.00% 0	116	3.46
We value employees using their initiative.	11.21% 13	56.90% 66	18.10% 21	9.48% 11	3.45% 4	0.86% 1	116	3.63
We value employees taking responsibility for their work.	22.41% 26	54.31% 63	10.34% 12	7.76% 9	5.17% 6	0.00% 0	116	3.81
We place great value on showing our appreciation for the efforts of each employee.	13.04% 15	34.78% 40	22.61% 26	20.87% 24	7.83% 9	0.87% 1	115	3.25
We value holding each other accountable for our actions.	6.90% 8	43.10% 50	23.28% 27	13.79% 16	11.21% 13	1.72% 2	116	3.21
We place great value on sustaining an inclusive work environment.	13.79% 16	43.97% 51	25.86% 30	9.48% 11	4.31% 5	2.59% 3	116	3.55
We place great value on making sure work teams include people with diverse perspectives and experiences.	7.76% 9	32.76% 38	37.07% 43	14.66% 17	4.31% 5	3.45% 4	116	3.26

City of Ashland DEIA and Culture

BASIC STATISTICS

	MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
We place great value on coordinating among different work teams	1.00	5.00	2.00	2.62	0.95
We place great value on every employee being proactive in their role.	1.00	5.00	2.00	2.54	1.00
We value employees using their initiative.	1.00	5.00	2.00	2.37	0.93
We value employees taking responsibility for their work.	1.00	5.00	2.00	2.19	1.03
We place great value on showing our appreciation for the efforts of each employee.	1.00	5.00	3.00	2.75	1.16
We value holding each other accountable for our actions.	1.00	5.00	2.00	2.79	1.13
We place great value on sustaining an inclusive work environment.	1.00	5.00	2.00	2.45	1.00
We place great value on making sure work teams include people with diverse perspectives and experiences.	1.00	5.00	3.00	2.74	0.96

Q6 This set of statements explores accountability at work for the City of Ashland. For each statement, select the option that best matches your perception and experiences at work for the Town.

Answered: 116 Skipped: 24

	STRONGLY AGREE (1)	AGREE (2)	NEITHER AGREE NOR DISAGREE (3)	DISAGREE (4)	STRONGLY DISAGREE (5)	TOTAL	WEIGHTED AVERAGE
Employees and staff are held accountable when inappropriate behavior occurs	8.62% 10	38.79% 45	26.72% 31	18.10% 21	7.76% 9	116	3.22
The City of Ashland has held itself accountable for providing a fair environment where different perspectives are valued.	6.03% 7	43.97% 51	31.90% 37	16.38% 19	1.72% 2	116	3.36
I believe I am personally responsible for supporting a fair environment where different perspectives are valued and people are respected.	43.97% 51	45.69% 53	8.62% 10	1.72% 2	0.00% 0	116	4.32
The City of Ashland values employees taking accountability for their work.	11.21% 13	58.62% 68	16.38% 19	11.21% 13	2.59% 3	116	3.65

BASIC STATISTICS					
	MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
Employees and staff are held accountable when inappropriate behavior occurs	1.00	5.00	3.00	2.78	1.08
The City of Ashland has held itself accountable for providing a fair environment where different perspectives are valued.	1.00	5.00	2.50	2.64	0.88
I believe I am personally responsible for supporting a fair environment where different perspectives are valued and people are respected.	1.00	4.00	2.00	1.68	0.70
The City of Ashland values employees taking accountability for their work.	1.00	5.00	2.00	2.35	0.91

Q7 Using the slider below, on a scale of 1 being the lowest value and 5 being the highest value, how trusted do you feel as an employee at the City of Ashland? You can also enter the number value in the box to the right of the question.

Answered: 116 Skipped: 24

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	4	458	116
Total Respondents: 116			

BASIC STATISTICS					
MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION	
1.00	5.00	4.00	3.95	1.14	

Q8 Using the slider below, on a scale of 1 being the lowest value and 5 being the highest value, tell us how much do you trust your colleagues and coworkers at the City of Ashland? You can also enter the number value in the box to the right of the question.

Answered: 116 Skipped: 24

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	4	420	116
Total Respondents: 116			

BASIC STATISTICS					
MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION	
1.00	5.00	4.00	3.62	1.12	

Q9 Using the slider below, on a scale of 1 to 5, with 1 being the lowest value and 5 being the highest value, tell us the degree to which you trust your supervisor. You can also enter the number value in the box to the right of the question.

Answered: 114 Skipped: 26

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
		4	114
Total Respondents: 114			

BASIC STATISTICS				
MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
1.00	5.00	5.00	4.23	1.15

Q10 Using the slider below, on a scale of 1 to 5 with 1 being the lowest value and 5 being the highest value, tell us how much you trust the City leadership team (that is, the City Manager, Deputy City Manager, and/or Department Directors). You can also enter the value number in the box to the right of the question.

Answered: 115 Skipped: 25

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
		3	115
Total Respondents: 115			

BASIC STATISTICS				
MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
0.00	5.00	3.00	2.90	1.43

Q11 Thinking back over your time working at the City of Ashland, Please respond to each of the following statements with the selection that most closely matches your perceptions and experiences.

Answered: 109 Skipped: 31

City of Ashland DEIA and Culture

	STRONGLY AGREE (1)	AGREE (2)	NEITHER AGREE NOR DISAGREE (3)	DISAGREE (4)	STRONGLY DISAGREE (5)	N/A	TOTAL	WEIGHTED AVERAGE
I have felt uncomfortable or treated differently at the City of Ashland because of my age.	2.75% 3	4.59% 5	19.27% 21	35.78% 39	35.78% 39	1.83% 2	109	3.99
I have felt uncomfortable or treated differently at the City of Ashland because of my race or ethnicity.	0.92% 1	6.42% 7	10.09% 11	32.11% 35	40.37% 44	10.09% 11	109	4.16
I have felt uncomfortable or treated differently at the City of Ashland because of my sexual orientation.	2.75% 3	0.00% 0	11.93% 13	33.94% 37	40.37% 44	11.01% 12	109	4.23
I have felt uncomfortable or treated differently at the City of Ashland because of my gender or gender identity.	4.59% 5	6.42% 7	14.68% 16	31.19% 34	37.61% 41	5.50% 6	109	3.96
I have felt uncomfortable or treated differently at the City of Ashland because of my religion or religious beliefs.	2.75% 3	1.83% 2	14.68% 16	33.94% 37	38.53% 42	8.26% 9	109	4.13
I have felt uncomfortable or treated differently at the City of Ashland because of my socio-economic status.	1.83% 2	2.75% 3	14.68% 16	37.61% 41	37.61% 41	5.50% 6	109	4.13
I have felt uncomfortable or treated differently at the City of Ashland because of a disability (including physical, emotional, learning, invisible, or psychological).	2.75% 3	0.92% 1	11.93% 13	34.86% 38	36.70% 40	12.84% 14	109	4.17

City of Ashland DEIA and Culture

BASIC STATISTICS

	MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
I have felt uncomfortable or treated differently at the City of Ashland because of my age.	1.00	5.00	4.00	3.99	1.00
I have felt uncomfortable or treated differently at the City of Ashland because of my race or ethnicity.	1.00	5.00	4.00	4.16	0.96
I have felt uncomfortable or treated differently at the City of Ashland because of my sexual orientation.	1.00	5.00	4.00	4.23	0.90
I have felt uncomfortable or treated differently at the City of Ashland because of my gender or gender identity.	1.00	5.00	4.00	3.96	1.12
I have felt uncomfortable or treated differently at the City of Ashland because of my religion or religious beliefs.	1.00	5.00	4.00	4.13	0.96
I have felt uncomfortable or treated differently at the City of Ashland because of my socio-economic status.	1.00	5.00	4.00	4.13	0.91
I have felt uncomfortable or treated differently at the City of Ashland because of a disability (including physical, emotional, learning, invisible, or psychological).	1.00	5.00	4.00	4.17	0.93

Q12 Please respond to the following statements with the selection that most closely matches your perception and/or experiences at the City of Ashland.

Answered: 109 Skipped: 31

	STRONGLY AGREE (1)	AGREE (2)	NEITHER AGREE NOR DISAGREE (3)	DISAGREE (4)	STRONGLY DISAGREE (5)	TOTAL	WEIGHTED AVERAGE
I feel respected at the City of Ashland.	16.51% 18	54.13% 59	15.60% 17	11.01% 12	2.75% 3	109	3.71
The City of Ashland is a comfortable place to be and work.	19.44% 21	48.15% 52	16.67% 18	13.89% 15	1.85% 2	108	3.69
I feel comfortable with the climate related to diversity and inclusion in my department, division, or work team.	24.77% 27	44.04% 48	20.18% 22	11.01% 12	0.00% 0	109	3.83
I am able to disagree with my supervisor without fear of retaliation.	29.63% 32	43.52% 47	11.11% 12	12.96% 14	2.78% 3	108	3.84
I respect my direct supervisor.	57.01% 61	30.84% 33	5.61% 6	3.74% 4	2.80% 3	107	4.36
As a whole, I respect the current leadership team (including, Interim City Manager/Deputy City Manager, and Directors).	16.67% 18	41.67% 45	23.15% 25	12.96% 14	5.56% 6	108	3.51
I feel that my performance is fairly evaluated.	14.81% 16	43.52% 47	24.07% 26	12.96% 14	4.63% 5	108	3.51

BASIC STATISTICS		MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
I feel respected at the City of Ashland.		1.00	5.00	2.00	2.29	0.96
The City of Ashland is a comfortable place to be and work.		1.00	5.00	2.00	2.31	0.99
I feel comfortable with the climate related to diversity and inclusion in my department, division, or work team.		1.00	4.00	2.00	2.17	0.93
I am able to disagree with my supervisor without fear of retaliation.		1.00	5.00	2.00	2.16	1.07
I respect my direct supervisor.		1.00	5.00	1.00	1.64	0.95
As a whole, I respect the current leadership team (including, Interim City Manager/Deputy City Manager, and Directors).		1.00	5.00	2.00	2.49	1.08
I feel that my performance is fairly evaluated.		1.00	5.00	2.00	2.49	1.04

Q13 As you think about the work environment at the City of Ashland and how people interact with one another, rate each of the following statements based on your perceptions and observations.

Answered: 109 Skipped: 31

City of Ashland DEIA and Culture

	STRONGLY AGREE (1)	AGREE (2)	NEITHER AGREE NOR DISAGREE (3)	DISAGREE (4)	STRONGLY DISAGREE (5)	N/A	TOTAL	WEIGHTED AVERAGE
I believe the City of Ashland is a welcoming place based on race and/or ethnicity.	17.59% 19	55.56% 60	14.81% 16	5.56% 6	2.78% 3	3.70% 4	108	3.83
I believe the City of Ashland is a welcoming place for people of all sexes (that is, born male, female, or intersex).	17.43% 19	55.96% 61	13.76% 15	5.50% 6	2.75% 3	4.59% 5	109	3.84
I believe the City of Ashland is a welcoming place for people of all gender identities (that is, how people choose to identify their gender regardless of the sex assigned to them at birth).	12.84% 14	48.62% 53	25.69% 28	4.59% 5	2.75% 3	5.50% 6	109	3.68
I believe the City of Ashland is a welcoming place regardless of age.	21.10% 23	57.80% 63	12.84% 14	3.67% 4	1.83% 2	2.75% 3	109	3.95
I believe the City of Ashland is welcoming to people from different socioeconomic statuses.	16.51% 18	59.63% 65	14.68% 16	2.75% 3	3.67% 4	2.75% 3	109	3.85
I believe the City of Ashland is a welcoming place regardless of disability (including physical, learning, or emotional and psychological disabilities).	14.68% 16	55.05% 60	22.02% 24	3.67% 4	1.83% 2	2.75% 3	109	3.79
I believe that diversity and inclusion makes the City of Ashland a better place to work.	26.61% 29	40.37% 44	15.60% 17	7.34% 8	6.42% 7	3.67% 4	109	3.76

BASIC STATISTICS					
	MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
I believe the City of Ashland is a welcoming place based on race and/or ethnicity.	1.00	5.00	2.00	2.17	0.89
I believe the City of Ashland is a welcoming place for people of all sexes (that is, born male, female, or intersex).	1.00	5.00	2.00	2.16	0.89
I believe the City of Ashland is a welcoming place for people of all gender identities (that is, how people choose to identify their gender regardless of the sex assigned to them at birth).	1.00	5.00	2.00	2.32	0.87
I believe the City of Ashland is a welcoming place regardless of age.	1.00	5.00	2.00	2.05	0.82
I believe the City of Ashland is welcoming to people from different socioeconomic statuses.	1.00	5.00	2.00	2.15	0.87
I believe the City of Ashland is a welcoming place regardless of disability (including physical, learning, or emotional and psychological disabilities).	1.00	5.00	2.00	2.21	0.81
I believe that diversity and inclusion makes the City of Ashland a better place to work.	1.00	5.00	2.00	2.24	1.13

Q14 "Microaggression" is a term used to describe slight verbal or small behavioral differences that can be interpreted as discriminatory. These behaviors can be intentional or unintentional. For this set of questions, please consider your experiences and observations throughout your interactions with people at work among employees, teams, and Departments at the City of Ashland.

Answered: 109 Skipped: 31

City of Ashland DEIA and Culture

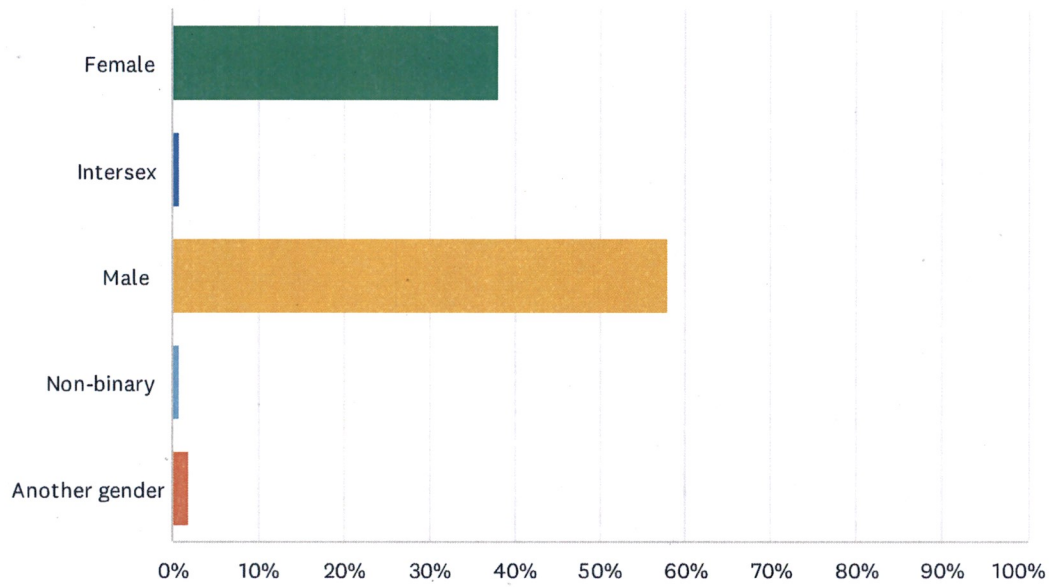
	EVERY WEEK (1)	EVERY MONTH (2)	A FEW TIMES A YEAR (3)	ALMOST NEVER (4)	NEVER (5)	TOTAL	WEIGHTED AVERAGE
I have experienced or observed comments or actions that I perceive as discriminatory against women.	1.85% 2	7.41% 8	12.96% 14	37.04% 40	40.74% 44	108	1.93
I have experienced or observed comments or actions that I perceive as discriminatory against people based on race or ethnicity.	1.85% 2	0.93% 1	8.33% 9	31.48% 34	57.41% 62	108	1.58
I have experienced or observed comments or actions that I perceive as discriminatory against people based on age.	0.92% 1	2.75% 3	10.09% 11	34.86% 38	51.38% 56	109	1.67
I have experienced or observed comments or actions that I perceive as being discriminatory against people based on gender identity (e.g., gay, lesbian, transgender, bisexual, gender fluid, non-binary, or other gender identity).	0.00% 0	3.67% 4	13.76% 15	27.52% 30	55.05% 60	109	1.66
I have experienced or observed comments or actions that I perceive as discriminatory against people with physical disabilities.	0.00% 0	0.92% 1	2.75% 3	25.69% 28	70.64% 77	109	1.34
I have experienced or observed comments or actions that I perceive as discriminatory against people with mental health challenges.	0.92% 1	2.75% 3	7.34% 8	33.94% 37	55.05% 60	109	1.61

BASIC STATISTICS						
	MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION	
I have experienced or observed comments or actions that I perceive as discriminatory against women.	1.00	5.00	4.00	4.07	1.00	
I have experienced or observed comments or actions that I perceive as discriminatory against people based on race or ethnicity.	1.00	5.00	5.00	4.42	0.83	
I have experienced or observed comments or actions that I perceive as discriminatory against people based on age.	1.00	5.00	5.00	4.33	0.84	
I have experienced or observed comments or actions that I perceive as being discriminatory against people based on gender identity (e.g., gay, lesbian, transgender, bisexual, gender fluid, non-binary, or other gender identity).	2.00	5.00	5.00	4.34	0.85	
I have experienced or observed comments or actions that I perceive as discriminatory against people with physical disabilities.	2.00	5.00	5.00	4.66	0.58	
I have experienced or observed comments or actions that I perceive as discriminatory against people with mental health challenges.	1.00	5.00	5.00	4.39	0.81	

Q15 What best describes your gender?

Answered: 105 Skipped: 35

City of Ashland DEIA and Culture

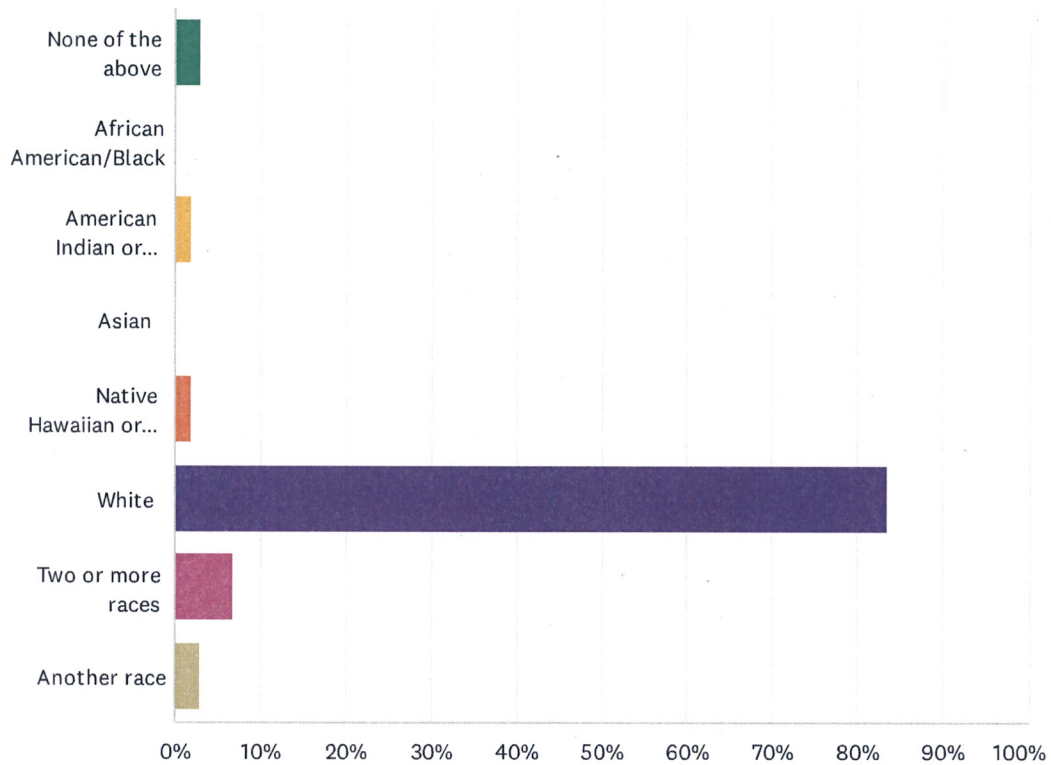


ANSWER CHOICES	RESPONSES	
Female	38.10%	40
Intersex	0.95%	1
Male	58.10%	61
Non-binary	0.95%	1
Another gender	1.90%	2
TOTAL		105

Q16 What is your race?

Answered: 104 Skipped: 36

City of Ashland DEIA and Culture

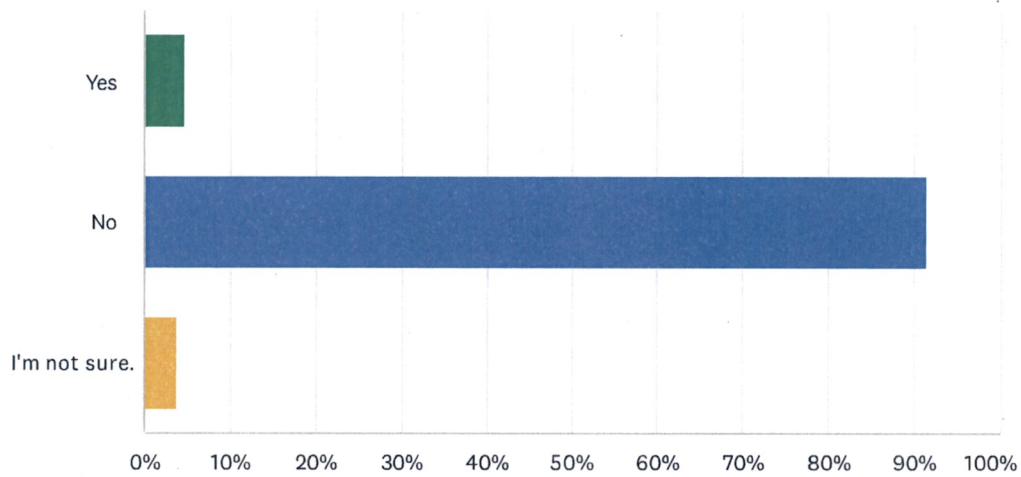


ANSWER CHOICES	RESPONSES	
None of the above	2.88%	3
African American/Black	0.00%	0
American Indian or Alaska Native	1.92%	2
Asian	0.00%	0
Native Hawaiian or Other Pacific Islander	1.92%	2
White	83.65%	87
Two or more races	6.73%	7
Another race	2.88%	3
TOTAL		104

Q17 I am Hispanic, Latina, Latino, or LatinX.

Answered: 105 Skipped: 35

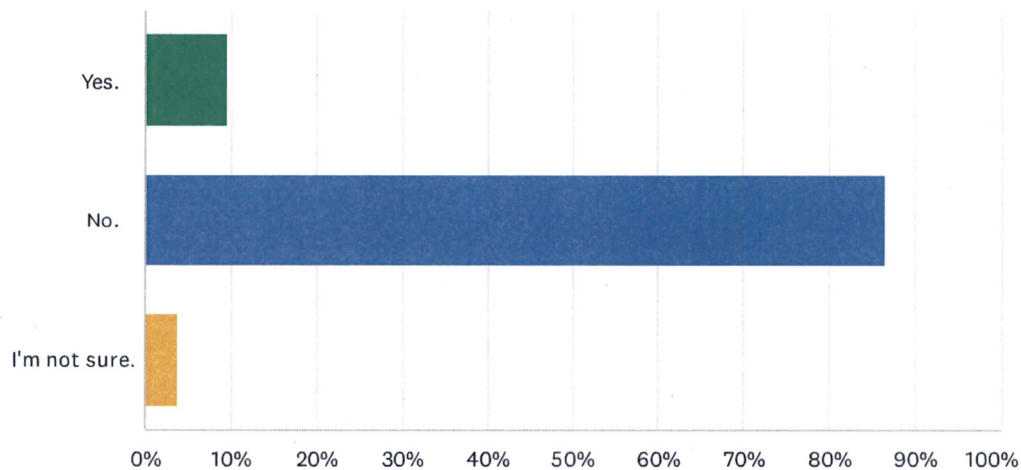
City of Ashland DEIA and Culture



ANSWER CHOICES	RESPONSES	
Yes	4.76%	5
No	91.43%	96
I'm not sure.	3.81%	4
TOTAL		105

Q18 I have a disability that substantially limits one or more major life activity. A disability can include physical, emotional, or learning. Disabilities can also be seen or unseen by others.

Answered: 105 Skipped: 35



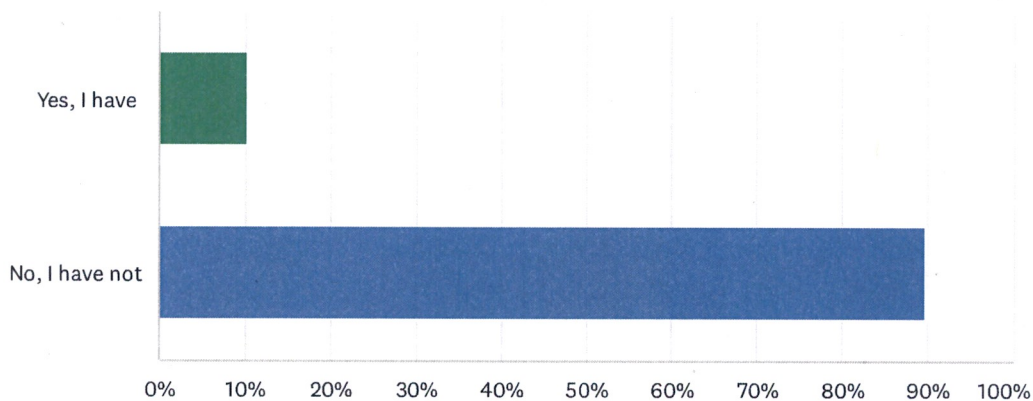
ANSWER CHOICES	RESPONSES	
Yes.	9.52%	10
No.	86.67%	91
I'm not sure.	3.81%	4
TOTAL		105

Q19 What is your current age (in years)?

Answered: 100 Skipped: 40

Q20 Have you ever served in any branch of the United States military, or not?

Answered: 107 Skipped: 33



ANSWER CHOICES	RESPONSES	
Yes, I have	10.28%	11
No, I have not	89.72%	96
TOTAL		107

Q21 What do you think the City of Ashland could do to enhance diversity, equity, and inclusion at work?

Answered: 66 Skipped: 74

Q22 Is there anything you think the City should stop doing in support of the goal of enhancing diversity, equity, and inclusion?

Answered: 53 Skipped: 87

Q23 Is there anything about your experiences with workplace climate and diversity, equity, and inclusion you'd like us to know about? Your responses are anonymous, so please feel free to add as much detail as you'd like.

Answered: 43 Skipped: 97

IMPLEMENTATION STRATEGY AND ROADMAP



February 2024



IMPLEMENTATION STRATEGY AND ROADMAP

CITY OF ASHLAND, OREGON



Targeted Universalism is an approach developed by powell, Menendian, and Ake¹ to creating public policy that means setting universal goals (that is, goals that apply to everyone, regardless of position, role, or element of diversity) that are achieved through targeted processes. As responses are targeted, the deployed strategies address the degree to which different groups within the environment access and attain the universal goal. In other words, to achieve equity, there may be some instances where goal attainment is unequal because different groups have different needs. In other words, Targeted Universalism seeks to move beyond equality and toward equity. It is a particularly useful framework for addressing elements of diversity and belonging in public policy. We're modifying this approach to address operational policies and practices that impede full belonging and welcomeness within the organizational culture of the City of Ashland.

For the City of Ashland, we identified 3 macro-level goals related to internal culture and belonging that include:

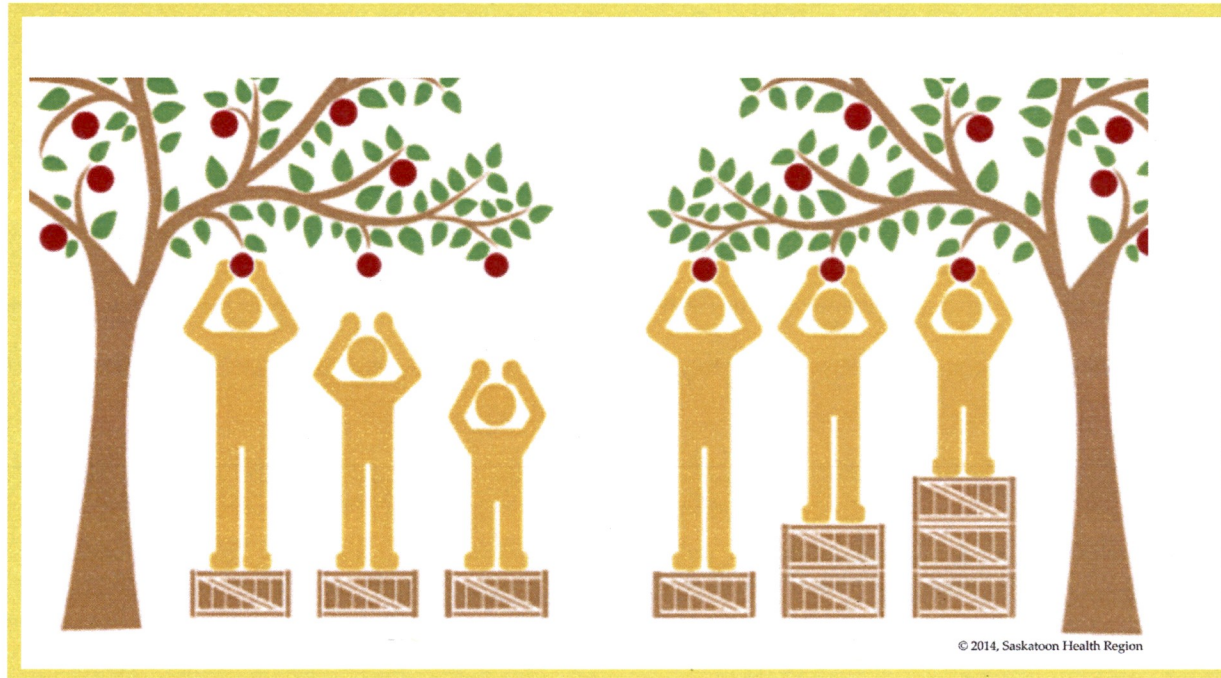
- ✧ All staff and employees of the City of Ashland engage in their work without structural barriers or impediments to inclusion and belonging.²
- ✧ Rebuild and strengthen organizational trust internally and with externally with elected officials.
- ✧ The City of Ashland is a place that supports and practices diversity, equity, inclusion, and access in many forms and expressions.

For each of these broad goals there are specific impediments to goal attainment that need to be addressed through a targeted response. These responses connect to findings and recommendations set forth in the DEIA, Culture and Belonging Assessment. Targeted Universalism involves intentional decision making about how elements of diversity and inclusion are connected to populations of people who may experience disadvantage. Once it is understood how policies impact populations of diversity, it is followed by constructive process to achieve both equity and equality in a way that doesn't "take away" from other populations. In other words,

¹ powell, j. Menendian, S., & Ake, W. (2019). Targeted Universalism: Policy and Practice. Haas Institute for a Fair and Inclusive Society. University of California at Berkeley. https://belonging.berkeley.edu/sites/default/files/targeted_universalism_primer.pdf?file=1&force=1.

² The term "structural" refers to those artifacts that support government including organizational structure, policies, procedures, and high-level mission and value statements.

policy decisions are made with an eye on both equity in and equality. Targeted Universalism balances the needs of all groups, removes barriers for disadvantaged groups, and creates a foundation for equitable belonging. A visual representation helps understand how targeted universalism works.

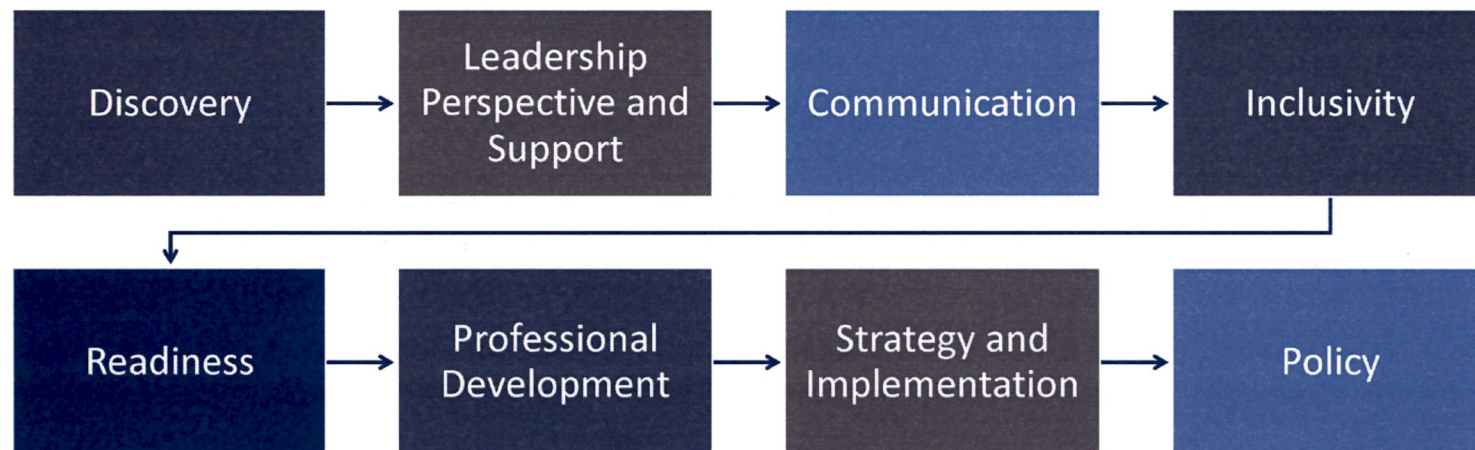


Sources: Elmina B. Sewall Foundation and Saskatoon Health Region Advancing Health Equity

The above graphic is a good visual representation of Targeted Universalism. Each figure receives the baseline support to gain what they need. Some figures receive targeted interventions to ensure equality. In this way, Targeted Universalism results in moving past equal treatment and toward equitable outcomes. In turn, belongingness is achieved because each person or group can experience a sense that they were treated fairly and received the tools, knowledge, and resources to thrive.

In addition to conceptual inspiration of Targeted Universalism, this implementation strategy uses a change management process based on data acquired during the DEIA assessment process and the findings and recommendations generated in that report.

Stay, Succeed, and Lead DEI Change Management Model



Through the DEIA assessment process, the Paradigm team touched on several elements of this model including discovery, understanding the perspectives and experiences of leaders, identified areas where communication could be improved, examined overall inclusivity, gained insight on staff readiness, and identified some professional development needs. This document includes an implementation strategy. We did not explore public policy issues, which may be an area the City wishes to examine later.

Goal 1: All staff and employees of the City of Ashland engage in their work without structural barriers or impediments to inclusion and belonging.

Targeted Response	Rec Mapping	Timeframe	Steps	Outputs	Outcome Measures
Support the Human Resources Department to build organizational capacity and operate with reasonable autonomy.	3, 5, 11, 12, 16, 19.	January 2024 – July 2024	Assess organizational and fiscal impact of strengthening the HR Department to include an assessment of staffing, technology needs. Determine additional and future staffing needs and seek appropriation request. Design and distribute an Employee Handbook to ensure all staff know current policy structure, understand, and practice the behaviors that support the City. Clarify reporting relationships, particularly among staff who “wear many hats”.	Employee facing activities related to compensation and benefits, performance evaluation, recruitment/onboarding/retention are centrally located. HR staffing levels are sufficient to support citywide culture and belonging needs. HR related employee complaints are reduced. Updated Employee Handbook that is accessible to all staff. Establish baseline measures related to behaviors and performance expectations of all staff. Clarified and transparent organizational structure and reporting relationships. Prioritization areas of greatest need in terms of staff recruitment.	Establish a baseline measurement of HR related employee complaints; establish measures with incremental progress goals. Establish compliance baselines for training, onboarding, and promotion, and success and track annually. Track distribution of revised Employee Handbook to staff; establish baseline measures of desired goals and measure annually to track performance to determine if wider and consistent distribution improves DEIA related outcomes.

			Ensure equitable workload distribution among staff. Develop and track DEIA development goals for staff, supervisors, and leadership. Design a recruitment and hiring process that takes into consideration employment needs and desires of potential candidates. Using data from various City departments and US Census reporting, determine projected rates of community growth, economic conditions, and other factors.	Improvements to candidate pool for open positions that addresses organizational prioritization of elements of DEIA. Employee engagement in DEIA related learning and practice for all staff at a level that is consistent with their role and level of DEIA development. Data-driven information about demographic and community changes that impact recruitment and selection for open positions.	Establish a baseline measurement of performance measures associated with “multiple hats” reporting relationships; establish performance goals to improve efficiency and sustain equitable workload goals. Establish baseline recruitment and hiring goals for each department; on a quarterly basis track outcomes and make adjustments as necessary.
Focus on DEIA as part of organizational culture and operations; ensure targeted response that addresses microaggressions	2, 5, 9, 10, 11	June 24 – June 25	Design and include DEIA related performance measures as part of annual performance reviews. Create opportunities for staff to self-identify an annual goal related to DEIA (e.g., enroll in a workshop,	Identification of baseline measure of DEIA performance outcomes for all staff that sets expectations regarding behavioral norms. Incremental annual goals for performance improvement based on the baseline measure.	In 2024, establish baseline measures and then track annually using performance review data. In 2024, establish a baseline measurement of DEIA individual goals,

toward women and members of the LGBTQIA community.			serve on an internal committee). Engage in long range planning for growth and contingency planning. Strengthen the performance evaluation process to encourage supervisors to address employee behaviors and missteps through supportive and timely interaction as they occur rather than waiting for the annual performance process. Develop a mid-year "check-in" process for supervisors to meet with individual contributors to discuss performance goals and engage in coaching to improve performance and/or goal achievement. Develop and implement City-wide education and	Reward achievement of individual performance goals and measure organizational impact. Structural and continual support to employees that confirms expectations related to behaviors that are inclusive of all staff and community engagements. Improved knowledge among staff related to impacts of microaggressions and microaggression deterrence behaviors. Reduction in number/percentage of staff who perceive that they are targets of microaggression within the organization.	then track annually thereafter. By the end of the 2024 3rd quarter, establish a baseline assessment of city-wide performance objectives and design a method to measure on a quarterly basis thereafter. By the end of the 2024 4th quarter, develop and implement a contingency planning process for the City. By the end of the 2025 1st quarter, establish baseline measures of number/percent of employees engaged microaggression deterrence professional development; measure quarterly thereafter. By the end of the 2025 2nd quarter, readminister the section of the Culture and Belonging survey to assess
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			development on microaggressions. Develop a method to provide additional support and learning to staff who engage in micro-aggressive behaviors and to people who are the targets of such behaviors.		impact of targeted interventions on microaggression outcomes. Assess annually thereafter.
Leverage the power of a relatively small staff to work together to solve organizational challenges related to work flow and service delivery.	2, 8, 12	September 2024 – December 2025	Develop formal mechanisms for cross-team collaboration to engrain DEIA into organizational culture to include reporting relationships; identify organizational performance measures. Engage in a process to identify service delivery gaps by Department, then collaborate with department leadership and key staff to identify where efficiency improvements could be attained by multi-team collaboration; engage staff throughout the organization in this process.	Identification and closure of service delivery gaps. Improved structure of cross-team collaboration to include reporting relationships and performance measurement. Improved employee engagement in processes that impact their work efforts.	By the end of the 4th quarter of 2024, establish a baseline measure of the number of cross-team collaborations and performance measures for each to assess community and operational impact. By the end of the 2nd quarter 2025 establish a baseline measurement of service delivery gaps and establish performance improvement measures; measure on a quarterly basis. By the end of the 1st quarter 2025, assess and measure the number/percentage of

			Identify a cross-team collaboration coordinator to provide high-level engagement and oversight of the process.		cross team collaborations, identify improvement targets for the upcoming year, and assess quarterly through 2026.
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Goal 2: Rebuild and strengthen organizational trust internally and externally with elected officials.

Targeted Response	Rec Mapping	Timeframe	Steps	Outputs	Outcome Measures
Improve leader-to-individual contributor communication channels.	14, 15	January 2025 – December 2025	Identify where communication gaps between individual contributors, supervisors, Department leadership, and City Executive Leadership occur. Involve staff in the design 2-way communication mechanisms that employees perceive will support improved communication.	Improved employee engagement in process that impact their work and career success. Development of an improved communication strategy to ensure important information is received by staff members in a timely way. Opportunities for employees to engage in “risk-free” reporting to improve the quality of communications from staff to leadership that supports immediate intervention and resolution.	By the end of 25 Q1, conduct an assessment of communication gaps and establish a baseline measure of the number of communications, communication deficits, and successfully transmitted information as a baseline measure. Then, measure semi-annually from that point forward to gauge success of improvements. If necessary, implement a “risk-free” reporting

			Determine the benefits, if any, of anonymous reporting technology. Develop a communication cascade strategy for the City for essential, organizational information. Continue and enhance efforts from Human Resources to engage in meaningful, 2-way communication from the HR Director to staff. Develop a policy regarding timeliness in reviewing written communications. Developed a regularly scheduled employee communications forum to include opportunities for staff to ask questions and have them answered by the City Manager.	Strengthened relationships between staff and executive leadership. Operational policy development to support continual and timely communication.	procedure by the end of 25 Q2, then during Q3 conduct a baseline measurement of reports received, reports resolved, and actions taken. Then measure quarterly from that point forward. By the end of 24 Q4, implement a communication cascade strategy and conduct a baseline measurement in 25 Q1. Establish performance goals and measure semi-annually from that point forward. In 25 Q4, conduct an assessment using questions from the Culture and Belonging survey to gauge whether improvements in employee perceptions have improved and set performance goals with semi-annual measurement from that point forward.
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					By the end of 25 Q2, launch a regularly scheduled program (may include employee listening sessions and/or written Q&A for employees to ask questions of the City Manager. Track staff participation and concern resolution on a quarterly basis from that point forward.
Continue to enhance relationships between leaders/supervisors and staff.	17,18, 19	January 2025 – December 2025	Provide leaders with professional development to strengthen leadership skill, adaptivity, and empathetic leadership.	Lower employee turnaround, improved organizational culture	By the end of 2025 Q2, 90 percent of leadership team participates in professional development activities that may include coaching. Provide annual refresher professional development to strengthen inclusion and empathetic leadership skill. Track participation annually.
Improve team collaboration and problem resolution by strengthening leadership skills of direct supervisors	19, 20, 21, 22, 25	January 2025 – December 2025	Work with Department directors to determine development needs that support skill-building in leadership and conflict resolution.	Insight on where leaders are aligned in terms of inclusive leadership, where they are not, and understand the nature of any gaps that exist.	In 25 Q3, identify a new pattern of practice for leaders based on empathetic leadership and set performance goals. Assess on a semi-annual

			Secure resources to provide professional development and support to supervisors and leaders based on need and interest. Engage in a values alignment process to gain insight from leaders about their capacity and willingness to engage in DEIA supportive actions. Provide guidance on inclusive leadership to promote a productive workplace with a focus on inclusion.	Leaders and supervisors engage in inclusive leadership strategies and strengthen connections with direct reports. Articulate those areas of public and operational policies where improved leadership impacts service delivery.	basis from that point forward. By 25 Q4, determine if appropriations requests to support leadership development are needed (and make request as necessary); identify performance goals as needed to support appropriations request. By 26 Q1, draft operational and public policy objectives with performance goals for inclusive/empathetic leadership as necessary. Track performance on a quarterly basis moving forward.
Continue efforts to build trust and align community service objectives between City staff and elected leadership.	NA	March 2024 – December 2025	Continue efforts to strengthen the relationship between City government executive leadership and elected leaders. Consider requesting space on City Council		

			meeting agendas to meet staff from various departments throughout the city and provide updates on efforts each department is making to improve inclusion with a focus on successes. Invite City Council members to participate and/or observe DEIA activities within City government. Consider hosting public events that create opportunities to bring elected leadership together with staff to build a community culture of inclusion.		
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Goal 3: The City of Ashland is a place that supports and practices diversity, equity, inclusion, and access in many forms and expressions.

Targeted Response	Rec Mapping	Timeframe	Steps	Outputs	Outcome Measures
Organizational Learning about Recognizing and Managing Implicit Bias.	NA		Engage in a professional development program to encourage staff to recognizing and manage implicit bias. Provide professional development and other guidance to supervisors on facilitating difficult conversations and modeling desired inclusive behaviors.	85 percent participation of all staff. Develop job aids for supervisors on facilitating conversations with staff about elements of diversity including race, history of Oregon related to race exclusion, and team building.	By the end of 25 Q1, facilitate education and assess baseline measurement of staff participation. Then set goals and measures to evaluate long term impact of education. By the end of 25 Q2 provide professional development to supervisors on facilitating difficult conversations. Track participation in education and execution of conversations with staff on a semi-annual basis.
Re-energize the interna DEIA Committee Develop internal programming to	NA	March 2024 – June 2025	Determine staff interest in re-engaging in the DEIA staff committee. Develop purpose and role for DEIA staff	Normalized inclusion and belonging among staff; employees voluntarily engage in at-work programs and activities.	By the end of 2024 Q3, re-establish the DEIA staff committee, recruit membership, and develop a meeting schedule.

encourage staff to voluntarily engage in pro-inclusion activities.			committee and provide support to the committee in terms of group development and DEIA modeling. Develop internal programs for staff and leaders to normalize DEIA behaviors. Some alternatives may include activities such as book groups, Lunch & Learns, guest speakers, gamified activities		Beginning in 2025 Q3 begin DEIA programming. Track number of participants with an incremental goal of increasing participation at each event.
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Summary of Findings, Recommendations, and Priorities

Finding 1: Values and behaviors of being proactive, showing initiative, and personal responsibility are important to employees, but may stifle creativity and innovation.		Priority
1	Retain and sustain the work value taking accountability for their own work and continuing to support employees using initiative, particularly around problem solving. The City may want to consider developing incentives for employees, such as reward or award processes that emphasize positive outcomes and/or proactive problem resolution through team participation and collaboration.	2
2	Increase organizational capacity for creating and sustaining teams that value diverse experiences, perspectives, and thought. Processes to consider may include cross-training and the development of multi-disciplinary teams to resolve high level problems and challenges. An example might be collaboration between public work teams and the police department to resolve traffic enforcement at intersections with high accident rates.	2
Finding 2: Employees feel accountable for producing good work, but don't perceive the city holding itself accountable for sustaining a fair work environment.		
3	Retain the work values associated with individual accountability for work product and fairness. Consider adding a performance factor to the annual evaluation process that focuses on assessing the degree to which individual contributors support a fair environment that values different perspectives.	2
4	Provide coaching and resources to managers and supervisors related to conflict management and engaging in difficult conversations with staff related to conduct and behavioral violations of conditions of employment at early stages to support open and clear two-way communication channels about challenges, opportunities, and behaviors associated with work product.	1
5	Consider processes and support to supervisors to strengthen their ability to address behavioral missteps of staff in a timely manner. The City may consider strengthening performance evaluation processes to encourage supervisors to comment on communication and behaviors, both positive and negative, as a mechanism to encourage respectful engagement with each other and the community as well as to support a cultural norm of positive intent in communication.	2

6	Develop skill building and guidance for supervisors to recognize disrespectful behaviors of people that report to them early and offer interventions and meaningful coaching to address behavioral missteps in the spirit of coaching and support instead of a more punitive approach to teambuilding.	2
7	Engage with staff through focus groups and small group discussions to re-design and execute an annual performance evaluation process that is perceived by employees to be fair, transparent, and captures values and contributions of staff on an annual basis.	1
Finding 3: Some employees view DEIA as a low priority that negatively impacts accountability and work productivity.		
8	Develop strategies to encourage employees to explore the connections between work productivity, accountability, and DEIA in ways that are private and personalized, and allow them to see the organizational value of DEI in ways they can personalize and use at work.	1
Finding 4: Microaggressions throughout the City tend to be aimed toward people who identify as female.		
9	Develop planned and strategic pathways to provide learning to City employees about gender and gender-identity diversity that helps employees identify stereotypes while supporting inclusive behavior.	1
10	Develop mechanisms to support a work environment where people can be confident and feel psychologically safe about gender, gender identity, gender expression, and sexual orientation and expression on their terms, mitigates risk exposure, and supports a healthy workplace.	1
11	Develop an operational policy related to behavioral expectations related to conduct and microaggressions that defines and prohibits micro-aggressive behaviors of all types. Distribute information about reporting mechanisms and graduated sanctions and penalties. Additionally, create performance metrics aimed at reducing prevalence of microaggressions across all groups.	1
Finding 5: Strengthening and supporting leadership skills, including conflict management, is needed to resolve team building by direct supervisors.		
12	Enhance support and professional development to immediate supervisors about strategies to leverage inclusion that encourages individual employees to contribute to team problem solving and resolution, identify and achieve team-based performance goals, and personalize value of DEIA in achieving career progression and performance.	1

13	As part of the annual evaluation process, City executive leadership should require that Directors and employees with supervisory responsibilities identify a professional development goal of: 1. Participating in a training opportunity or workshop associated with improving communication skills, DEIA, or team problem solving, - OR 2. Setting a measurable performance goal that demonstrates team collaboration and communication that utilizes strategies associated with inclusive leadership to solve a particular challenge or improve service delivery.	2
Finding 6: Communication deficits erode trust which weakens trust between employees, supervisors, and City leadership		
14	City leadership and immediate supervisors should collaborate with each other about identifying where communication gaps may be occurring, then construct a communication strategy to ensure critical information flows downstream to staff in a clear and timely way. This communication strategy may include touchpoints within the communication flow that requires signature (e.g., director, supervisor, employee) for mission critical communications.	1
15	Consider the development of establishing two-way communication mechanisms for staff to engage directly with directors and City leadership. Options may include exploring technologies that allow for anonymous reporting (e.g., fraud and abuse reporting technology), and greater opportunities for direct communication between employees, directors, and city executive leadership.	3
16	Update and develop a comprehensive Employee Handbook that includes all current policies and regulations that pertain to employee experience throughout the full employment life cycle from recruitment and selection to retirement, including succession planning. Update this book at least biannually, and consider distributing through multiple formats (e.g., web-based, paper, or optimized for tablets and remote devices).	1
Finding 7: City leadership should clarify and define goals, objectives, and metrics with a focus on measurement and planned incremental change for the future.		
17	Engage in a leadership alignment process to identify goals, objectives, and measures from the perspective of leaders that support building a culture of inclusion and organizational belongingness at the City of Ashland. As an example, this process may follow this structure, but elements and areas of focus should be unique to City needs.	3

18	Conduct a gap analysis and design a strategy to connect employee perceptions of trust and accountability (see Recommendation 14) and results from leadership alignment (Recommendation 17). Utilize this strategy as part of the City's strategy for DEI sustainability.	2
Finding 8: Shift attention toward strategies that focus on inclusive leadership and away from diversity management.		
19	In order to strengthen trust, the City Leadership Team should move toward inclusion leadership with an emphasis on sustaining a productive workplace where employees are encouraged to express their opinions, and input is sought before important organizational decision making in a manner that supports voice, perspective, and involvement of all employees, including those with different perspectives including race, ethnicity, age, gender, gender identity, and disability as a long-range goal and strategy rather than focusing on diversity management.	1
Finding 9: impediments to a psychologically safe work environment are connected to race, ethnicity, gender, and gender identity.		
20	Continue efforts to encourage respect and value the differences among the workforce that includes developing strategies to create opportunities for learning, sharing, and understanding that the strength that diversity and inclusion has on the work experience and organizational trust.	2
21	Provide additional support to direct supervisors related to recognizing and valuing differences among their team, including education on recognizing the early signs of conflict and effective conflict management that supports early identification and resolution.	1
22	Readminister the Culture and Belonging survey (minimally, the construct of organizational comfort) no sooner than one year from the release of this report to determine whether measurable change has occurred related to comfort and trust.	3
Finding 10: Most employees perceive the City as welcoming, but there are some barriers.		
23	Develop a recruitment and retention strategy that leverages the strengths of appealing to new employees through non-conventional compensation packages. At the same time, develop strategies to strengthen organizational commitment related to multiple elements of diversity that may improve retention of employees and create avenues for diverse recruitment strategies including greater use of advanced technologies and social media.	1

Finding 11: Some employees fear retaliation by supervisors or leadership, but not as defined by Federal or State labor laws.		
24	We did not identify any incidents of retaliation as defined by federal or state law through our assessment process. As such, we make no recommendations related to legal retaliation, but view the perceptions of staff as indicators of lower than ideal levels of trust in terms of decision making that benefits employees directly. We refer to recommendations related to trust and team building in Part II of this report for specific strategies.	3
Finding 12: High levels of trust and respect for supervisors throughout the organization creates opportunity to strengthen DEIA as part of organizational culture.		
25	Develop strategies and provide support for supervisors to facilitate building from the foundation and culture of trust staff have with their immediate supervisor by developing strategies to strengthen DEIA acceptance and practice throughout the City.	1



Council Business Meeting

Date

Agenda Item	Contract for Diversity, Equity, and Inclusion (DEI) Assessment with Paradigm Public Affairs, LLC	
From	Sabrina Cotta	Deputy City Manager
Contact	Sabrina.cotta@ashland.or.us 541-552-2106	
Item Type	Requested by Council ☐ Update ☐ Request for Direction ☒ Presentation ☐	

SUMMARY

In June of 2022 Council gave direction to conduct a DEI assessment of the City organization as recommended by the Social Equity and Justice Commission. \$40,000 was appropriated for this purpose. The City has conducted a successful RFP process and Paradigm Public Affairs, LLC has been selected to conduct the assessment.

POLICIES, PLANS & GOALS SUPPORTED

In the summer 2022, the City Council adopted Vision and Value Statements for the City. This includes being an *open, welcoming community for all*, the Organization has the values: *Respect for the citizens we serve and the work we do. Excellence in governance and city services.*

BACKGROUND AND ADDITIONAL INFORMATION

In June of 2022 the City Council appropriated \$40,000 to conduct an internal DEI assessment of the City Organization. The RFP was published December 1, 2022, on both the City of Ashland website and the Oregonbuys.gov which is the preferred site for posting all RFPs published in Oregon. The deadline to ask questions about the RFP was January 16, 2023, and answers were posted on the City's website. The deadline to respond to the RFP was February 17, 2023.

100 plus entities downloaded the RFP and the City received 20 viable responses. The responses were reviewed and scored by five staff people based on the scoring criteria detailed in the RFP.

FISCAL IMPACTS

\$40,000 in already appropriated funds for this purpose.

DISCUSSION QUESTIONS

Next steps will include ensuring a Human Resources Director is brought on board with the City and extensive messaging by the City Manager's office is utilized to prepare the Organization for this assessment. The Human Resources Director will be the main point person with support from the City Manager's office. The assessment will begin in September 2023 to allow time for this to occur.

SUGGESTED NEXT STEPS

Staff recommends awarding the Professional Services Agreement to Paradigm Public Affairs, LLC to conduct an internal DEI Assessment.

REFERENCES & ATTACHMENTS

Attachment 1: REQUEST FOR PROPOSAL Consulting Services Diversity, Equity, and Inclusion Internal Assessment



Council Business Meeting

Attachment 2: Response to Request for Proposal prepared by Paradigm Public Affairs, LLC

Attachment 3: Scoring Sheet

Attachment 4: Paradigm Letter: Project Date

Attachment 6: Revised Scope of work with revised budget

REQUEST FOR PROPOSAL

Consulting Services

Diversity, Equity, and Inclusion

Internal Assessment

RFP 22-010

Issued: Friday, December 01, 2022

Response Deadline: 4:00 p.m. Friday, February 17, 2023

Last Day to Submit Questions: Monday, January 16, 2023

Responses to all questions will be posted here www.ashland.or.us/responses

(Questions must be submitted in writing to cheryl.artrip@ashland.or.us)

Submit to:

Administration Department

Office of the City Manager

City of Ashland

20 East Main Street

Ashland, OR 97520

CONSULTING SERVICES FOR AN INTERNAL ASSESSMENT
FOR DIVERSITY, EQUITY AND INCLUSION



**CITY OF
ASHLAND**

Approved as to form:

A handwritten signature in blue ink, appearing to read 'DM', enclosed within a blue circular stamp.

Douglas M McGeary, Acting City Attorney

Project Overview

The City of Ashland requests proposals from experienced consultants to assess the internal operations of the organization through the lens of diversity, equity, and inclusion.

The Request for Proposal may be obtained:

- Through www.oregonbuys.gov
- City of Ashland website: www.ashland.or.us
- Via Email: administration@ashland.or.us

Proposals must be received by 4:00 p.m. PST on Friday, February 17, 2023. Sealed paper proposals must be marked in the lower left corner on the envelope “RFP 22-010 CMO, DEI Assessment” and submitted to Cheryl Artrip, Administrative Assistance, City Hall, 20 East Main Street, Ashland Or 97520. Please include the signed original and three copies. Email and Facsimile proposals are not acceptable.

Proposers responding to this RFP must follow the procedures and requirements stated within this RFP. Adherence to these procedures and requirement will ensure a fair and objective analysis of the proposals submitted. Failure to comply with or complete any part of this RFP may result in rejection of the submitted proposal.

The assessment will be administered by the Deputy City Manager’s Office.

Scope of Work

- Conduct an analysis and develop a baseline assessment report of the City of Ashland’s current organizational practices and level of DEI awareness and competency to fully appreciate the contribution of all staff and to identify priorities to further strengthen DEI capacity to shape and execute the City’s operations.
- Develop the City’s long-term DEI strategy and prioritize recommendations in the areas for hiring practices, procurement procedures and programming/services offered.
- Identify and incorporate qualitative and quantitative performance metrics and data to gauge DEI initiatives.
- Identify steps the City of Ashland could take to build trust and meaningful engagement with historically underrepresented and marginalized groups, as well as community partners.

- Provide insight and knowledge on DEI best practices with a focus on government agencies.
- Develop a training strategy to increase staff DEI competencies, skills and capacity.
- Increase awareness, address disparities, and promote equity and inclusion within City funded programs.

Desired Deliverables

An internal report assessing the current state of our organization's access, diversity equity and inclusion practices and culture.

A strategic plan that illustrates clear and actionable steps for internal strategies to address diversity, equity, and inclusion. The Plan should include:

- Assessment of hiring procedures, policies, and promotions. Recommend tools that support access, diversity, equity, and inclusion strategies, such as recruiting and staffing software that assists with unbiased selection and recruitment processes. All suggested actions must comply with State and Federal Law.
- Framework for continued culture changes for long-term sustainability of access, diversity, equity, and inclusion strategies.
- Framework for vendor selection that incorporates diversity, equity and inclusion best practices. Update vendor policies to align with best practices and identify reporting and monitoring processes.

Evaluation Process

1. Scoring Criteria

Scoring will be based upon the following described categories. The proposer must describe how each of the requirements specified in this RFP are met. Responses should be clear and concise.

1.1 Understanding of Requested Quote

Maximum Score 10 points

Demonstrate a clear and concise understanding of the scope of services being requested in this RFQ.

1.2 Proposer's Capabilities

Maximum Score 20 points

Demonstrate capability to complete the requested services. Response must include:

- (10 points) An explanation describing how the proposer can accommodate the varying workload contemplated under the contract, including a description of anticipated response times throughout the proposed project timeline and task assignment/schedule.
- (10 points) An explanation describing proposer's proximity to the project and how the proposer can cost effectively accommodate working on this project. If applicable, describe proposer's branch or satellite offices that will project the requested services, indicate their locations(s) and which services they are able to perform.

1.3 Project Team and Qualification

Maximum Score 25 points

- (5 points) Describe the extent of principal involvement, and how you incorporate diversity, equity and inclusion practices.
- (10 points) Include descriptions of three or more relevant projects. Include project outcomes, team members and references.
- (10 points) Describe the experience and qualifications of proposed project manager(s), and provide information regarding key staff members who are anticipated to perform services.

1.4 Resources

Maximum Score 20 points

Demonstrate proposer's resources available to be allocated for the proposed scope of services. Describe any staffing or technology specialties or unique strengths that relate to the services requested in this RFP. Include a brief description of new or innovative technologies to be used.

1.5 Response Time

Maximum Score 15 points

These criteria relate to how quickly the consultant can begin (contract signing) and complete (final document delivery and formal final presentation) the project. The consultant must demonstrate how time will be managed.

1.6 Cost of Services

Maximum Score 10 points

- Professional, technical, other professional rates
- Estimated billable hours by major project element
- Direct non-labor costs that might be applicable;
- All license and services costs are complete and fully contained in the quoted price.

	Criteria	Maximum Score
1.1	Understanding of Requested Services	10
1.2	Proposer's Capabilities	20
1.3	Project Team and Qualifications	25
1.4	Resources	20
1.5	Response Time	15
1.6	Cost of Services	10
		TOTAL 100 Points

After the proposals are reviewed, additional information may be requested for final evaluation. The City of Ashland reserves the right to cancel this RFP at its sole discretion.

Additional Information

The City reserves the right to reject any and all proposals not in compliance with all prescribed public bidding procedures and requirements and may reject, for good cause, any and all proposals upon the finding that it is in the public interest to do so.

The City's programs, services and activities are open to all persons without regard to race, gender, age, handicap, religion, ethnic background, sexual orientation, or national origin.

A proposal may be withdrawn at any time before the proposal deadline, by providing a written request for the withdrawal of the proposal to the issuing office. A duly authorized representative of the firm shall execute the request. Withdrawal of a proposal will not prejudice the right of the proposer to file a new proposal.

City of Ashland, Oregon

**Response to Request for Proposals
Diversity, Equity, and Inclusion (DEI) Internal
Assessment**

Prepared by Paradigm Public Affairs, LLC

14 February 2023





14 February 2023

Joseph Lessard
City Manager
City of Ashland
20 East Main Street
Ashland, OR 97520

Dear Mr. Lessard and Members of the Selection Committee,

Paradigm Public Affairs appreciates the opportunity to present the City of Ashland with our proposal in response to your RFP for a Diversity, Equity, and Inclusion Assessment. We were drawn to your RFP for a number of reasons.

- Through an ordinance approved by City Council, the City of Ashland has created the Social Equity and Racial Justice Commission (SERJ). This signals to us that the City has leadership and community support to advance efforts within City government that promote diversity, equity, and inclusion.
- We recently completed a project in Jackson County for another municipality and we come prepared for this engagement with knowledge of the region, unique cultural attributes, and knowledge of community partners.
- Your RFP document identifies the development of performance metrics as a project deliverable to gauge DEI success. This suggests to us that you are interested in identifying meaningful impact and avoiding performative allyship.
- Finally, we really like working in Oregon. This year Paradigm made a strategic decision to focus work on our firm's home state of Colorado and the Pacific Northwest (PNW). For projects in Oregon and Washington, we have a team member who resides in the PNW, Dr. Matt Jones. Dr. Jones, who up in Jackson County, can offer historical and cultural context. Apart from being convenient for you, this means that we can help you when you need it and on your terms. Our Denver based team members can fly direct from Denver to Medford, so being on site easily achievable.

Every once in a while, we see a project where our unique perspective and experience aligns with a client, and we see that opportunity with the City of Ashland.

Let me tell you a bit more about who we are and why we're different from other firms. First and foremost, we are a firm that helps and supports local government. Paradigm Public Affairs is a woman owned small business in the Denver Metropolitan area. We were established in 2018 and since that time we've served local governments around the country in providing consultancy related to equity and inclusion, strengthening the relationships between government and the communities they serve, public policy review, and organizational development. We're different from other firms because working with state and local governments is not a practice area for us – it is exclusively what we do.

We are advocates and allies for local governments and we distinguish ourselves from other firms in important ways:

- Each member of our consulting team has practical experience in local government.
- We make every effort to match a team lead with the geographic region of each client, so we retain value in understanding the culture, dynamics, and political structure of the clients we serve.
- Each team member holds advanced credentials in local and/or state government, including team members with doctorate education and practice in law, policy, and public administration.
- Our services include up to 1 year of consultancy maintenance at no cost. There's nothing more frustrating than feeling that you've been left with an assessment with recommendations and findings yet you still have questions and need guidance. Our services typically include up to 1 year (24 hours) of follow-up consultancy after the engagement closes so clients have access to team resources and guidance after our time together ends.

We take great pride in our approach to working with local governments that includes adaptive consultancy with results that are co-produced with our clients, including creating educational content and delivery. We bring significant, practical experience in local government leadership and service, and if you ask any of our consultants, we'll tell you that we believe we are public servants, even though we now work for a private firm. Through this approach and mindset, you achieve results that are unique and relevant to the City of Ashland and the people, communities, and neighborhoods you serve. We are critical in our assessments, but in a way that is designed to help you see new opportunities and a vision for the future. When we design training and professional development, we work from the perspective of adult learning and an understanding and respect for people who are public servants in a variety of disciplines and programmatic areas.

Paradigm Public Affairs is uniquely positioned to support the City of Ashland in meeting your expectations and needs:

Experience	We Offer...
Experience and Diversity in Thought Leadership	Our consultants as are diverse as the clients we serve and the future our clients envision for their communities. We emphasize thought leadership in our work with clients by contributing to new and different theories, applications, and evidence-informed decision making.
Consultants with experience in local government	Our practice is comprised of consultants who have served in various government capacities throughout the nation. We bring a diverse skillset including experience in policy and program evaluation, leadership, public safety, public health, and planning and development, and a variety of other fields. We bring expertise in government beyond human resources, so you're positioned for a "Whole Community" strategy to assessment and training.

Experience in organizational culture assessment and the creation of practical strategic planning and implementation guidance.

Our typical strategies for assessment means collecting qualitative and quantitative data that become a baseline, or point in time, measure for DEI success. Our process is to understand your current state, look to the future to where you want to be, and then construct an implementation strategy to bridge the gap between the two. In the design of implementation strategies, we rely heavily on the concept of Targeted Universalism, the same strategy used by the State of Oregon.

This document outlines our proposed strategy for this important project. We encourage you to view this plan as a menu so you can make decisions about phased investment and select the process that works best for the City of Ashland. We look forward to learning about the next steps in the selection process. This letter and included proposal serve as an offer for services and is valid for 180 days. If we are fortunate enough to earn your trust for this project, I will serve as the principle contact for contracting, but my colleague Matt Jones who is based in the Portland area will serve as the local contact and project lead for you.

Sincerely,

A handwritten signature in black ink, appearing to read 'Tanya Settles', is positioned to the left of the typed name.

Tanya Settles, Ph.D.
Chief Executive Officer
Paradigm Public Affairs, LLC
tanyasettles@paradigmpublicaffairs.com
303.887.1608

Firm Profile

Paradigm Public Affairs, LLC is a full-service public sector management and leadership consulting firm established in 2018. Our specialty areas of practice include diversity, equity, and inclusion (DEI) and law enforcement consultancy. We are committed to providing customized strategic solutions, with sustainable, measurable results, to address the specific needs of an organization's culture. We are a woman owned business in the State of Colorado and our staff is comprised of over 15 consultants, researchers, designers, facilitators and more, located in the Denver area and across the United States.

Within the past several years, interest in how government entities create efficient, safe, community-centric approaches to challenges has significantly increased. We approach this work very differently from our competitors who tend to focus on rote assessments of management, policies, and procedures that ends with a set of recommendations and no direction on how to implement the findings or education programs that are not customized or specific to the client. Our approach is different, and our focus is on working with our clients as partners to identify unique challenges and areas of need. We use empirical evidence, published research and notable best practices, to work with and guide our clients to **value differences** while **enhancing government performance** and community **collaboration through the co-production of results**.

We believe governments can improve performance, strengthen their relationship with the community, and produce superior results by implementing transformational organizational change. Every part of the process is developed through collaboration with our clients with our role as one of helping each client to achieve their intended results, including content customization and development in education programs. We are attentive to your unique needs and circumstances, and every step of our process is customized to your needs including survey instrumentation, facilitation of discussion sessions with stakeholders, education development and delivery, and organizational culture assessments. Our approach is based on our extensive practical experience in government and each consultant and associate holds advanced academic credentials. We work closely with our clients to ensure key stakeholder voices are included in a very collaborative process.

Name	Paradigm Public Affairs, LLC
Address:	11757 W. Ken Caryl Ave., Ste. F-315 Littleton, CO 80127
Website:	paradigmpublicaffairs.com
Office Number	720.775.1171
General Email	Info@paradigmpublicaffairs.co
Primary Contact for this Project	Tanya Settles Chief Executive Officer
	tanyasettles@paradigmpublicaffairs.com 303.887.1608

Our Mission

The mission of Paradigm Public Affairs is to help and support local government entities in building respectful, peaceful, and inclusive policies and processes to bridge the gap between government and the multifaceted communities they serve.

Our Vision

We envision sustainable, effective governments where employees and leaders are agents of change and boundless capability; governments work in tandem with communities to achieve effective, equitable, and transparent partnerships; and a world where government is shared, participatory, and hinges on collaborative relationships with communities.

Our Core Values

*Leadership is shared and requires community collaboration to achieve success.
Strategic and equitable partnerships are the basis of reciprocal and sustainable vision.
Better decisions are made with evidence and data.
Equity is a shared responsibility between government and communities.
Success is a strategic decision.*

Every government is different, and no two local governments are alike. We recognize and embrace the complexity of government and the unique attributes of every local government we serve. At Paradigm Public Affairs, we are process consultants. We listen to you with genuine curiosity, we learn from you, and approach work from the perspective that we are your partners in designing solutions. This means that we work collaboratively with each client to gain deep understanding about needs, culture, values, and goals for the future. Through this partnership, we identify challenges and barriers, and we develop solutions with you so that when we leave our time together, you have the tools you need to continue work independent of consultancy support. Our goal is to appreciate the difference between the organization you are now compared to what you envision for the future.

Added Value Statement

Our team brings a unique mix of skills, perspectives, experiences, and diversity to the forefront of our work with clients. We are different because:

- We each have worked professionally in local government in different areas and programs ranging from social services, public health, law enforcement, program and policy evaluation, public works, and parks and recreation (among many others).
- Each member of our team holds advanced credentials in public policy, public administration, public affairs, or related disciplines.
- We are diverse in unique ways ranging from race, identity, gender, and multiple

dimensions of intersectionality.

- Each of us has a background in higher education which means that we understand the complexity of local government, and develop solutions that are accessible, reachable, and sustainable to our clients.
- We only work with state and local government entities. We know our strengths, and we are experts in local government.
- We are a small organization by design which gives us great flexibility and ability to focus on a small handful of clients at one time. We have breadth and experience to work with the smallest of local governments with under 100 employees to the largest local governments in the nation with tens of thousands of employees.
- Several of our consultants and associates are "qualified" or "certified" administrators for standardized diagnostics such as the Intercultural Development Inventory and the EQi 2.0 series to assess emotional intelligence acuity. These tools can be incorporated into the assessment process.
- We follow the "humble inquiry" approach to consulting. Our goal is to partner with you, provide guidance where you need it, listen intently without judgement so we learn from you, and yet do the heavy lifting so you can focus on the business of government. When we leave our time together, our ultimate goal is that you have the skills, knowledge, and capability to sustain DEI and organizational transformation with limited, or entirely without, consultancy support in the future.

Part 2: Project Team Overview

Each of the team members identified have decades of executive and high-level local government experience, coupled with advanced training, and a dedication to supporting state and local governments in creating realistic, sustainable, and strategically planned and executed DEI initiatives. This practical experience is enhanced by many years of data analysis, executive training and practice, and consulting experience. Our team is multi-disciplinary meaning that each brings subject matter expertise in different aspects of government services and operations. Additionally, because we believe the best decisions are made from a position of evidence, each team member is trained in advanced research methods, data acquisition, management, and analysis which gives the City of Ashland assurance that we're the right team to help you develop performance metrics as needed related to professional development.

Roles and Responsibilities

The table below describes key responsibilities, role, and areas of subject matter expertise for the team we currently envision for the City of Ashland. As we learn more about your needs, we may adjust the team to meet those needs, or introduce other consultants to the project if we learn that different areas of expertise are required for the successful completion of this project.

Team Member	Expertise	Responsibilities
<i>Tanya Settles, PhD</i> <i>Client Partner</i> <i>(Primary contact)</i>	Restorative Justice	Assessment Design and Execution
	Community Capacity Building	Education Strategy, Design & Facilitation Coaching
	Public Health	Qualitative and Quantitative data analysis
	Emergency Management	Qualified Administrator for the Intercultural Development Inventory (if necessary)
	Law Enforcement	Client Relationship
<i>Matt Jones, PhD</i> <i>Consultant</i> <i>(Local contact)</i>	Organizational Development	Assessment design and execution, including analytic strategy
	Public Leadership Practice	Education facilitation
	Executive Coaching Group Facilitation and Education	Qualified Administrator for the EQi 2.0 (if necessary)
	Water Quality and Watershed Protection	

<i>Robert Rico, EdD Consultant</i>	Public Health and Human Services	
	Restorative Justice	Cultural Dialogue and Engagement
	Working with Adult Learners	Education Design and Facilitation
	Education Design	
	Community Capacity Building	
<i>Judith Fitzgerald, JD Consultant</i>	Focus Group Facilitation	
	Housing	Distance Education Design and Delivery
	Youth Advocacy	Legal review
	Human Resources	
	Law & Policy	
<i>Dan Settles Director of Operations and Client Relationships</i>	Enterprise Resource Planning Systems (ERP)	Information Technology needs
	Government IT Analytics	Data Extraction
	Resource Management	Operations and Billing
		Business Analytics

Please see the following pages for short resumes for each consultant team member. Full curricula vitae are available upon request.



JUDITH FITZGERALD

Consultant

PROFILE

Judith is a tireless advocate for people with disabilities, youth, and those who have been socially disenfranchised by the criminal justice system. Her legal work has spanned multiple areas including housing assistance, disability advocacy, and family law. Beyond her legal skill, Judith is a talented educator with a focus on using multiple strategies and technologies to meet adult learners where they are and move them toward the next level of success.

Judith has held various leadership roles in higher education, including leadership of a large academic program at Bowie State University. She is a member of Alpha Kappa Alpha sorority, the first Black-Greek letter sorority in the United States.

CONTACT

PHONE:
443.802.6202

EMAIL:
judithfitzgerald@yahoo.com
judith@paradigmpublicaffairs.com

EDUCATION

Boston College Law School
Juris Doctorate

Walden University
Master of Philosophy, Criminal Justice

Lincoln University
BS, Political Science

EXPERIENCE HIGHLIGHTS

Lecturer and course developer in NGO & Nonprofit Management program at Johns Hopkins University

Former program director in Criminal Justice at Bowie State University.

Recipient of the 2013 Dream Keeper's Award for Mentorship (and recognized on the Congressional Floor by Congressman Ruppberger)

Served as Senior Counsel to the Atlanta Housing Authority

Practicing attorney representing clients and litigated matters in criminal defense, indigent prisoners referred by the US District Court on Criminal Appeals before the US Court of Appeals, 4th Circuit, family law, disability.

SKILLS

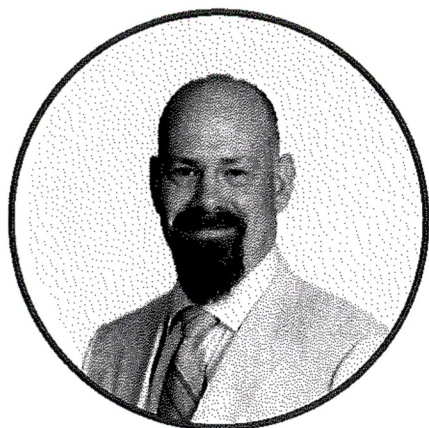
Strategic thinking, planning, restructuring in public and nonprofit organizations

Program evaluation

Leadership coaching

Disability law

Teaching with technology



MATTHEW JONES

PROFILE

Dr. Matthew Jones has been engaged in public sector consulting for over 15 years. His passion is partnering with organizations and individuals to innovate and achieve high-level performance. With a dedication to helping organizations solve problems and improve operations, he has served as a consultant on small and large projects that have included: organizational assessments, DEI development and sustainability, leadership development programming and training, research & analysis, executive coaching, and meeting facilitation.

Matt prides himself on his scientific approach to consulting but is best recognized for his human relations skills in projects. Matt started work on implicit bias in police organizations in 2005 and continues this work today. His approach is to work alongside clients integrating transformational leadership, emotional intelligence, and empathic thinking.

CONTACT

PHONE:
360.921.2321

EMAIL:
matt@nwemergent.com

EDUCATION

Portland State University

Doctor of Philosophy, Public Administration, emphasis Organizational Development (2008)

Master of Public Administration (2004)

Norwich University

Bachelor of Arts, Criminal Justice (1996)

EXPERIENCE HIGHLIGHTS

Current Vice President for the Clark County, Washington Clean Water Commission

President of the Board for the Lower Columbia River Estuary Partnerships

Member, Clark County WA Law and Justice Council

Former Assistant Professor of Public Safety Management at the State University of New York – Brockport

Former Assistant Professor and Program Manager for the Leadership in Public Safety Programs at Portland State University

Former Chief of Police at Condon, Oregon

Author of numerous published articles on police administration and research methods and design.

SKILLS

EQi-2.0 Certified (emotional intelligence)

Organizational Culture & Development

Facilitation

Quantitative and Qualitative Research Design and Execution

Performance Measurement and Metrics Development

Executive Coaching



ROBERT RICO

PROFILE

Dr. Rico is the Director of Restorative Justice at the Office of Inclusive Excellence at the University of Texas at San Antonio. Prior to this work, Robert served as a lecturer in the College of Public Policy, Department of Criminology and Criminal Justice at the same institution. Dr. Rico was the founder and program coordinator of the Restorative Justice Program of Kendall County and spearheaded and was a field consultant for a pilot project at Edward White Middle School in San Antonio. Dr. Rico also served as a police officer for 20 years and attended the Bill Blackwood Law Enforcement Management Institute of Texas and Leadership Command College at Sam Houston State University

EDUCATION

University of Texas at Austin

Ed.D. Higher Education Leadership (2022)

University of Texas at San Antonio

Master of Public Administration (2004)

Bachelor of Arts, Criminal Justice (2001)

EXPERIENCE HIGHLIGHTS

Pioneer in restorative justice and inclusion in higher education

Public speaker and coach on inclusion in higher education

Served on the Big Brothers Big Sisters Juvenile Justice Council

Board of Directors for Kendall County (TX) Child Services

Published author and thought leader in restorative justice and inclusion in public safety.

SKILLS

Education and curriculum design for adult learners

Community capacity building

Qualitative data analysis

Community forum facilitation

Language fluency in Spanish



TANYA SETTLES

PROFILE

Dr. Settles is the founder and Chief Executive Officer of Paradigm Public Affairs, LLC. Tanya and her team have partnered with local governments across the United States toward a path of community partnership, unity, and enhanced government performance. Tanya supports local governments through a focus on community capacity building, leadership, and professional development that leverages diversity, equity, and inclusion to achieve, build, and sustain high performance governments where employees and community members, alike, are invested and welcome.

Tanya has held various leadership state and local government, primarily in the areas of public safety, public health equity, higher education, and policy and program evaluation. Dr. Settles' current work focuses on race and community relations, restorative justice, diversity and inclusion in public safety and education, and the impacts of natural and human caused disasters on at-risk and diverse populations.

CONTACT

PHONE:
303.887.1608

EMAIL:
tanyasettles@paradigmpublicaffairs.com

EDUCATION

University of Colorado at Denver
Doctor of Philosophy, Public Affairs (2001)
Master of Public Administration (1996)

Metropolitan State University of Denver
Bachelor of Science, Criminology and Criminal Justice (1995)

EXPERIENCE HIGHLIGHTS

Former Associate Professor of Criminal Justice at the University of Texas at San Antonio

Appointed as a subject matter expert in law enforcement education to the Colorado Peace Officers Standards and Training Board

Published author and thought leader in diversity, equity, and inclusion, community and restorative justice, public ethics, and emergency management

Served as the Director of Faculty for Colorado State University Global Campus

Served as the Director of Strategic and Tactical Planning for the Denver Police Department

Subject Matter Expert to the Columbine Commission

Former Managing Auditor for the Office of the Colorado State Auditor

SKILLS

Advanced analytics, including statistical modeling and analysis

Quantitative and qualitative research design and execution

Education program and curriculum design, including machine language ability (Python) and HTMLX programming

Community capacity building

Envisioned Timeline and Team Availability

We envision 6 months to deliver this project, though accommodations can be made based on need and budget. A minimum of 4 consultants will be required to deliver all project deliverables. We respect the boundaries of budget and time, so to optimize both, you may only see 2 consultants on site with the other team members working remotely. We currently have the resources and staff time available to begin this project as early as March 1 with project completion by August 31, 2023. In determining staffing, we prefer to schedule engagements so that no team member is working on more than 3 projects at any given time. At this time, we confirm we have consultant availability and resources necessary to complete this project based on the following timeline and proposed workplan. In the interest of transparency, some members of this team are in the process of wrapping up one engagement, with a second project currently underway.

Preliminary Project Schedule

Step	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Project Launch						
Build Trust with Leaders and Staff						
Conduct Culture and Belonging Assessment						
Human Resources and People Management Review						
Analysis of Vendor Selection and Procurement Processes						
Design Implementation Strategy (Targeted Universalism)						
Design 18-month Strategic Plan						
Project Closure						

Part 3: Qualifications, Experience, and Capabilities

Paradigm Public Affairs has had the privilege of working with a variety of local government entities across the United States to address challenges and needs related to inclusive governance, efficiency, and government effectiveness through enhancing organizational culture and diversity, equity, and inclusion. We've worked with some of the largest local governments in the nation, and some of the smallest. Every municipal and regional government needs and deserves solutions that are unique to them and their circumstances.

The figure below shows some former and current clients we've worked with over the past several years. For these clients, we've provided services ranging from process consultancy to organizational assessments, education and professional development, facilitation of community engagement processes, and community capacity building.



Between 2018 and 2022, Paradigm Public Affairs and The Kaleidoscope Group entered into a strategic alliance partnership to develop DEI consultancy around the needs of government, public safety, and law enforcement clients. Some of the clients on this list include those served as part of this partnership where Paradigm Public Affairs either fully or substantially delivered services to clients.

Recent Examples of DEI Projects and Success

2022/3: City of Edgewater, Colorado. We recently completed an assessment of organizational culture, welcomeness, and belonging within Edgewater City government. Edgewater is a unique city that is geographically small, with a correspondingly small population size (under 6,000 residents, overall), but with the challenges and opportunities of a large municipal government because of geographic situation in the Denver metropolitan area. Our work for this assessment focused on determining a baseline assessment of belonging and inclusion within the workforce, offering recommendations for sustainable government administration that may include organizational restructuring, resolution of isolated incidents of organizational trauma related to DEI and belonging, and construction

of an implementation roadmap to put a measurable, performance-based plan into place over an 18-month time horizon.

2022: City of Medford, Oregon. This project had 2 prongs – first was a limited scope assessment of organizational readiness and flexibility related to diversity, inclusion, and access for employees in terms of HR practices, management, and service delivery. The second prong was a fairly deep dive into housing instability, houselessness, and equity in service delivery that included the Housing and Development Department, Police Department, relationships with private service providers, and intergovernmental agreements with state, local, and federal funding and oversight sources. One of the most notable findings associated with this study was identification of the City's challenges in acknowledging the needs of the Latino/a/X population in the city both in terms of valuing and leveraging diversity within City government and in service provision and outreach to the community.

2021-2023: Town of Mooresville, North Carolina. Our team has been working with the Town of Mooresville since the spring of 2021 when we provided DEI education and ongoing consultancy and support to their ERG, the Diversity Advisory Committee. We will continue this work throughout the remainder of 2022 through a comprehensive organizational culture assessment that includes qualitative and quantitative data collection components and use of more advanced analytical strategies to identify opportunities for improvement from baseline measurement (we're using exploratory factor analysis). Recent work in Mooresville has included developing training and professional development on strategies to practice allyship in government work.

2021-2022: Metro Nashville Government. Paradigm, in partnership with the Kaleidoscope Group, designed 2, 4-hour professional development/education programs for county and city government individual contributors and leaders about understanding and managing bias, engaging in inclusive and respectful behaviors, and challenging conversations. Leader education focuses on performance and people management strategies; individual contributor education focuses on understanding and managing bias and techniques to engage in respectful and inclusive behaviors both internally and in delivering services to an incredibly diverse and robust community.

2021: Village of Arlington Heights, Illinois. We conducted a limited scope organizational assessment that included a customized survey deployment to look at employee perceptions of diversity and inclusion, Human Resources and talent management policy and process review, and facilitation of a series of community listening sessions and moderating a Town Hall between community members and the Mayor and Town Manager. These community engagement sessions were conducted in the midst of the Co-VID epidemic, and therefore were facilitated virtually. Ideally, at least half of these sessions would have been conducted in person, but public health concerns were significant at the time of delivery.

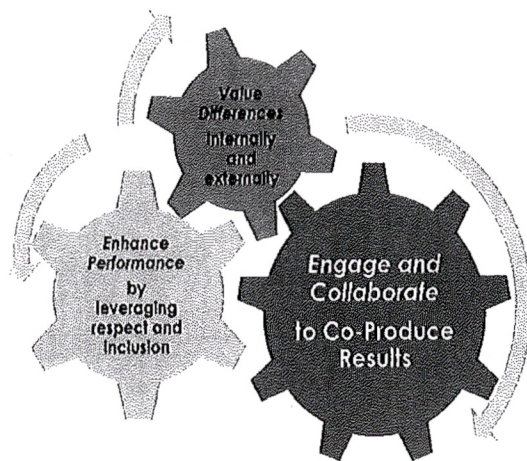
2021: Government of Racine County, Wisconsin. For Racine County government, we conducted leadership visioning and alignment sessions, delivered the EQi2.0 for leaders (with a group debriefing), and designed and delivered education programs for managers and individual contributors across the entire county government.

References

Town of Mooresville, NC	City of Medford, OR	City of Edgewater, CO	Village of Arlington Heights, IL
Tiffany Shelley	Bonnie Barasch	Jocelyn Mills	Mary Rath
Director of Human Resources	Director of Human Resources	Deputy City Manager, Director of Community Development	Director of Human Resources
413 N Main Street Mooresville, NC 28115 704.799.4027	411 W. 8 th St. Medford, OR 97501	1800 Harlan Street Edgewater, CO	33 S Arlington Heights Rd. Arlington Heights, IL 60005 312-692-3326
tshelley@mooresvill enc.gov	bonnie.barasch@ cityofmedford.org	jmills@edgewater co.com	mary.rath@vah.com
Client Partner since 2021	Client partner since 2021	Client partner since 2022	Client Partner since 2019
Tailored design education programs for all employees, leaders, and law enforcement	Limited Scope DEI Organizational assessment	Culture and Belonging organizational assessment	Conducted organization wide assessment
Consultancy support and guidance to the internal Diversity Advisory Committee	Assessment of housing/houseless ness with DEI lens	Human Resources policy review	Engaged in community outreach and facilitated community listening sessions
2022 work underway including organizational culture and belonging assessment within Town government.	Policy review and assessment of Community Development Block Grant award process	Consultancy support to the DEEI Staff team	Designed tailored strategic planning template for the Village
	Assessment of community partner relationships in response to houselessness and housing insecurity	Development of implementation strategy with performance benchmarks	See https://www.vah.com/your-government/diversity-equity-inclusion for a copy of the report.

Part 4: Project Understanding and Approach

Within the past several years, interest in how government entities create efficient, safe, community-centric approaches to governance where diversity, equity, inclusion, and belonging is a central focus has significantly increased. Our approach is different because we work with our clients as partners to identify unique challenges and areas of need through a methodologically sound assessment process that may include adhering to Yellow Book standards when needed. We take what we learn from the assessment to create highly customized professional development and training that is unique to your needs and circumstances.



We use empirical evidence, published research, and notable best practices to work with and guide our clients to value differences and enhance government performance.

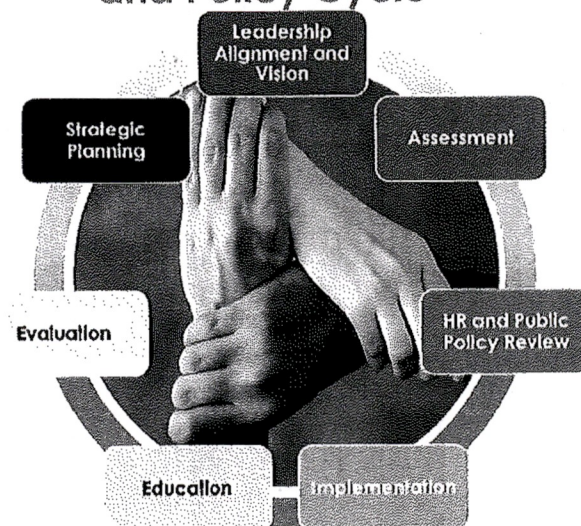
A key differentiating factor from our competitors is that our services often include the development of relevant implementation roadmaps when findings and recommendations call for policy change. In these cases, we often recommend an approach based on targeted universalism for policy

development because it allows government entities to look at equity and equality at the same time yet recognizes differences between the two. For local governments in Oregon, this is important, as the State of Oregon has adopted Targeted Universalism as a preferred policy structure so your approach may align with potential funding opportunities and resources.



Our process for this project follows a 6-month engagement and the timeline presented in Part 3 of this proposal. Our approach for DEI work blends best practices with key touchpoints of the public policy process. This blended model supports bringing assessment findings and education and training together as a matter of strategy. Our Blended DEI Development Cycle includes 7 points of interaction and engagement. To support incremental and strategically planned improvement, the process is cyclical so that clients can track success, make process and goal changes when needed, and continually evolve and adjust to changing internal and external factors.

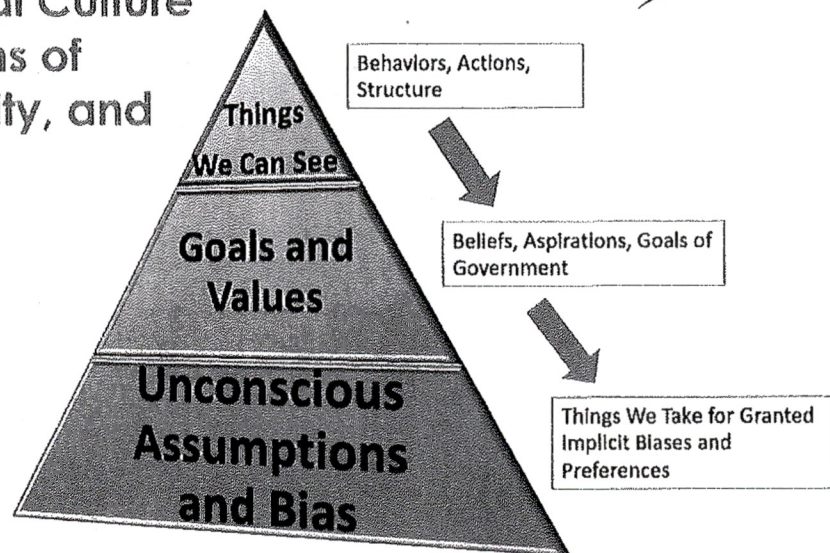
Blended Government DEI/Organizational Development and Policy Cycle



Because this model is cyclical, steps do not need to occur in a particular sequence. However, for the City of Ashland we recognize that your immediate needs are an organizational assessment, review of human resources and people management policies, design of an implementation strategy, and strategic planning.

Peter Drucker once said, "culture eats strategy for breakfast". This means that no matter how strong the assessment, strategy, or implementation plan is, if they don't fit within the organizational culture of the organization, the risk of failure is great. For that reason, part of our process includes taking time to understand the organizational culture of the City of Ashland within the context of organizational culture and belonging and professional development content and delivery. Our approach to understanding organizational culture and assessment is based on Edgar Schein's 3-layer model of organizational culture adapted to uncover, identify, and provide solutions to challenges and barriers to inclusion in governance.

Organizational Culture Through a Lens of Equity, Diversity, and Inclusion



Our recommendation for this project is to begin by looking at organizational culture to gain insight about how City government works, the degree to which you support a welcoming work environment, and what that means for service delivery to the community. This process involves looking at organizational culture by first examining the surface that includes the behaviors, practices, and structure of government. In other words, we look at those things that are seen by people, organizations, and partners that interact with the City of Ashland. Then we look deeper into the values and goals of City government to better understand what drives the organization and how DEI may (or may not) fit into those values. Finally, at the deepest level, we look for the things that are taken for granted. It is at this very deep level that unconscious bias exists that may impact how policies & procedures are structured and how staff interact with the community in the execution of those policies. When we encounter inequity, it is typically at this deeper level.

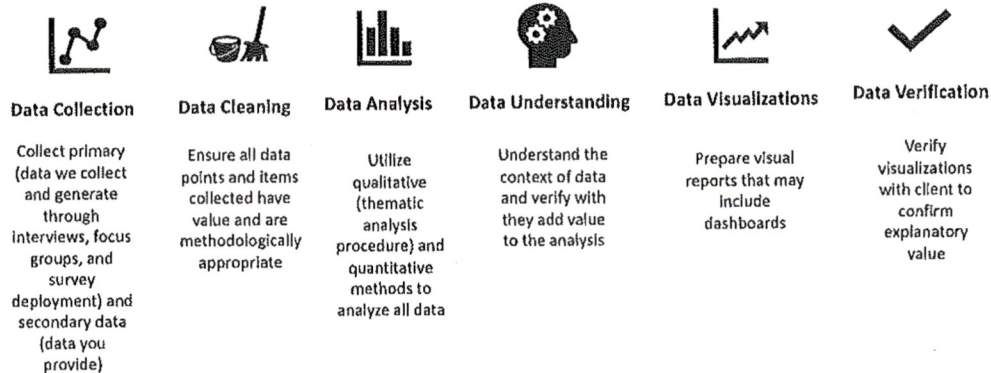
We envision 3 key parts to this project; first, a culture and belonging assessment, second the design of an implementation strategy that may be inspired by Targeted Universalism, and last, an 18-month strategic plan. Most work for the assessment will be conducted off site, though there are key points, such as focus groups, some interviews, and other events where we will need to have team-members on-site in Ashland. If we are fortunate enough to earn your trust, we will work together – with you – to develop a site-visit schedule that fits your needs when we finalize the scope of this project.

Culture and Belonging Assessment Approach

Our proposed process for baseline EDI assessment for the City of Ashland follows these general steps:

1. **Engagement launch and conduct project information sessions** to dispel myths and encourage participation throughout Ashland government. We recommend conducting information sessions with Department directors and leaders first, followed by general sessions with staff and employees. These sessions may be in-person, virtual, hybrid, or any combination that meets the needs of your workforce.
2. **Conduct a high-level organizational review** of documents, policies, and processes that support government. This step provides initial insight as to how the City is structured, operates, and gives us insight about areas of opportunity where DEI may improve overall performance.
3. **Conduct focus groups and individual interviews and analyze data.** This step involves engaging with employees and leaders to understand where the greatest opportunities are DEI needs and improvement, and gain insight as to how DEI objectives dovetail with organizational culture. In our experience, we gain deep understanding and knowledge through direct communication and engagement with staff. Qualitative data from focus groups and interviews is also used to tailor a survey to the unique needs and opportunities in City of Ashland government. In some cases, for various reasons, we're not able to connect with as many staff and employees as we'd like. When this occurs, we recommend facilitating listening sessions so all employees have an opportunity to engage in the project and claim ownership of the end result.
4. **Collect and analyze quantitative data.** Quantitative data may come from data the City of Ashland already holds (such as data from Human Resources Information Systems) or from a survey we customize and deploy specific to this project. Surveys are delivered electronically, can be translated into various languages as needed, and are optimized for mobile devices. Typical analysis includes descriptive statistics and cross-tabulations to look for significant differences and statistical relationships between elements of diversity (such as race/ethnicity, age, ability/disability, and gender among others) and behaviors and perceptions within government. The need for higher level analytics will be a decision we make together. As an example, we recently used an exploratory factor analysis strategy coupled with a regression analysis technique to identify the key drivers of diversity, equity, inclusion, and organizational culture that are unique to that organization.

Data Analysis Process



5. **Develop findings & recommendations and construct report.** Our reporting tends to first highlight those practices and policies that support inclusion and equity within a government, then look at opportunities to enhance the foundation already in place. Reports tend to include identification of challenges with solutions that are customized to each client as well as exploring opportunities for the future.
6. **Design implementation roadmap.** We see implementation planning as a separate deliverable from the assessment report. Guidance on implementation of findings and recommendations will help keep the momentum going and identify ways for team collaboration in implementation strategies. Findings and recommendations from the assessment are used as the foundation for a unique implementation roadmap that covers 6 to 18 months and includes metrics and measures for incremental and steady improvement. In our experience, a time horizon of more than 18 months increases the risk of non-completion. Additionally, since our services include up to 1 year (24 hours) of follow-up consultancy, you have the support you need to implement the strategy we design to improve DEI outcomes in the future.
7. **Design strategic plan.** The Implementation Roadmap may be considered part of the strategic planning document. In addition to designing a roadmap to help guide the City of Ashland through addressing findings and recommendations, we will also design a strategic plan and framework for the City of Ashland that includes identification of strategic areas of focus, goals for each of those strategic areas, measures and metrics for each goal that defines how you will measure success. We also recommend including in the strategic framework identification of keys that support sustainable change related to communication strategies, accountability for key stakeholders and groups, and education as needed. The strategic plan will be delivered as a report with a written narrative, and then consolidated into an infographic for distribution throughout the workforce.

Proposed Workplan and Scope of Work

This workplan represents our current understanding of the City of Ashland's immediate needs. We encourage you to view our proposed workplan as a menu. Each of these items can be scaled up, scaled down, or modified to meet unique circumstances. The schedule/timeline corresponds with an overall 6-month engagement and follows a structured and phased approach to activities and deliverables.

DRAFT SCOPE OF WORK		
ENGAGEMENT STEP	ACTIVITIES and DELIVERABLES	TIMELINE
Project Launch	1. Paradigm to conduct 60 min. kick-off meeting with key stakeholders (may be conducted virtually). 2. Paradigm to request organizational documents related to policy and operations throughout the City and information about partnerships with external stakeholders.	Month 1
Phase 1: Building Trust	1. Conduct an information session with Executives, Leaders, and individual contributors to introduce the project and team, answer questions, and dispel myths about DEI. 2. Hold 1:1 conversations with leaders to gain insight about vision for assessment and education goals.	Months 1-2
Phase 2: Conduct Culture and Belonging Assessment Human Resources, People Management Review Analysis of Vendor Selection and Procurement Processes	1. Qualitative data collection (may include 1:1 interviews, focus groups, listening sessions). 2. Collection and analysis of existing quantitative data from previous surveys and other data collection efforts related to organizational culture and workforce engagement. 3. Conduct detailed review of talent management policies, procedures, and practices for the City as a whole and individual departments and entities as needed. 4. Analyze all data (quantitative and qualitative) for themes and findings; report back to City for feedback and collaboration. 5. Develop draft culture report and acquire feedback from City on results. 6. Periodic touchpoint meetings with key stakeholders 7. Culture and Belonging Assessment delivery	Months 2-4
Phase 3: Design Implementation Strategy to Complement Assessment Recommendations and Finding	1. Prioritize recommendations based on urgency, risk, and ease of execution 2. Categorize recommendations into goals, develop overarching performance measures for each goal. 3. Design/develop implementation steps for each goal.	Months 4-5

	4. Gain feedback from client as to content, adjust/modify content as needed.	
Phase 4: Develop 18-month DEI Strategic Plan	5. Conduct SWOT analysis 6. Based on assessment results, identify core goals and values associated with belonging, culture, and DEI 7. Articulate action plans for core goals. 8. Incorporate incremental measurement and metrics points for process improvement.	Months 5-6
Phase 5: Project Closure	9. Consolidate all deliverables into a single document 10. Conduct final presentations as needed to leadership and elected officials (may be virtual or on site)	Months 6

This timeline and schedule for deliverables is based on the following assumptions:

- The Paradigm team will have access to relevant City of Ashland staff and leadership.
- The City of Ashland will assist our team in determining appropriate internal and external stakeholders for project tasks as needed.
- The City of Ashland will submit data and information, as needed, in a timely fashion.
- The City of Ashland will help promote opportunities for employee engagement as part of this project.

Communication Strategy

Co-production means maintaining and supporting open and transparent communication. Early in the project or engagement, we recommend biweekly meetings to touch base with key stakeholders that are virtual (e.g., Zoom) or in some cases in person. Our team member, Matt Jones, will be your primary "in-person" contact with other team members attending virtually. The exception is when we're on-site conducting assessment or education delivery activities. Our firm is based in the Denver area, and team members are located across the United States (Matt Jones is located in the Portland, Oregon area, Judith is in Baltimore, Robert Rico is located in San Antonio, Texas). For complex engagements, we recommend use of project management tools such as Gantt charts that are available to the client through a Google Cloud. We also recommend at least quarterly written status reports to the key client contact and/or Deputy City Manager.

If you decide to work with us, you will be provided with direct contact information for each team member. Our policy is that email from clients are answered within 1 business day, text messaging is welcome, as are direct phone calls. We'll work with you to schedule regular meetings (typically virtual) for project updates and for purposes of co-production, and if necessary, we'll create files in Google Workspace so you have access to project management tools, working papers, and feedback on deliverables and activities.

Part 5: Investment Proposal

We encourage you to view our proposed workplan as a menu and each of these items can be scaled up, scaled down, modified, or eliminated entirely to meet your needs. For Total Cost, we used a rough estimate of 425 employees for purposes of estimating focus group composition and survey results.

Paradigm Public Affairs does not charge for travel or supplemental fees (with some specific exceptions such as administration of standardized assessments), so these costs reflect only the time our team will be working on this project. Our fees are set at a flat \$275 per billable hour for all services. We develop costs based on the following factors:

- Our workplan narrative presented in the proposal.
- Our staffing plan and resource allocation which provides the City with the appropriate number of consultants and a level of expertise to complete the tasks defined in the RFP.
- Our experience conducting projects of similar size and scope.

Additional services not described in this proposal may result in a change in cost. Our all-inclusive price to conduct this project as described in this proposal is \$44,550. We understand this estimate is slightly over the budget you've identified for this project. We welcome the opportunity to discuss the scope of services with you and refine/revise as we better understand your needs.

ACTIVITY	HOURS
Project Launch and Information Sessions (1 for Leaders, 3 for Staff, may be delivered virtually, on-site, or both)	10
High Level Organizational Review	16
Focus Groups, Individual Interviews (requires 2 days on site with 2 consultants), Qualitative Data Analysis	40
Quantitative Data Collection, Survey Design/Deployment, Quantitative Data Analysis	30
Develop Findings & Recommendations; Report Construction	30
Design Implementation Roadmap and Strategic Plan with Resource Needs and Incremental Touchpoints for Measurement	20
Project Closure Including Presentations (may be virtual or in-person, TBD)	16
TOTAL HOURS	162
HOURLY RATE	\$275
TOTAL PROFESSIONAL FEES	\$44,550

Paradigm Public Affairs Preferred Terms

Payment: Payment schedule for services described in this statement of work:

- 30% of Professional Fees will be billed and payable upon contract initiation
- The remaining professional fees and reimbursable expenses will be invoiced monthly until the work plan budget is exhausted. (Travel and reimbursable expenses will be invoiced as incurred and billed according to the client's policy or guidelines if included in the cost proposal)
- All prices are guaranteed for twelve (12) months from the date of execution of the contract

Reimbursements: Travel and out-of-pocket expenses (e.g., airfare, hotel, rental car, ground transportation, parking, mileage, meals, etc.) are included in the agreed upon scope of work as described. Additional requests from the client may result in additional costs that are billed and payable as incurred..

Time for Work: If work is pre-billed and work is not completed within twelve months of date of contract, the contract will expire, and any collected pre-billed funds will be forfeited.

Audio and Video Recording: Audio and/or video recording of Paradigm Public Affairs content, consultants, and/or events at any client venue is prohibited unless written consent is provided in advance by Paradigm Public Affairs. Additional fees may apply.

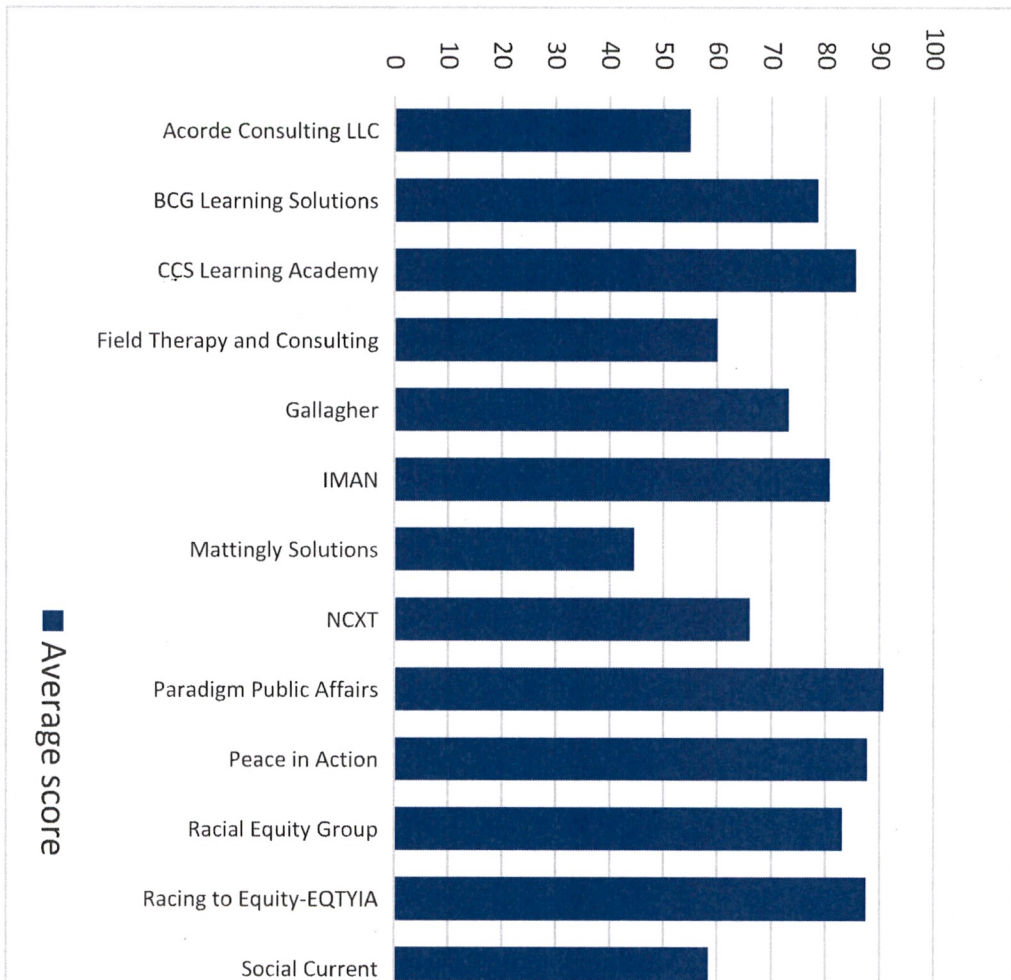
Cancellation of Work: If work is scheduled and cancelled within 15 business days prior to the scheduled date by the Client, the charge will be 25 percent of the cost of the work. If work is scheduled and cancelled within 10 business days of the scheduled date by the Client, the charge will be 50 percent of the cost of the work. If a cancellation occurs, no cancellation fees shall be due if Paradigm Public Affairs and the Client are able to mutually reschedule the work within 30 days. If Paradigm Public Affairs cancels this agreement, Paradigm Public Affairs will reimburse client any unexpended funds from the payments that have been received to date towards pre-paid work.

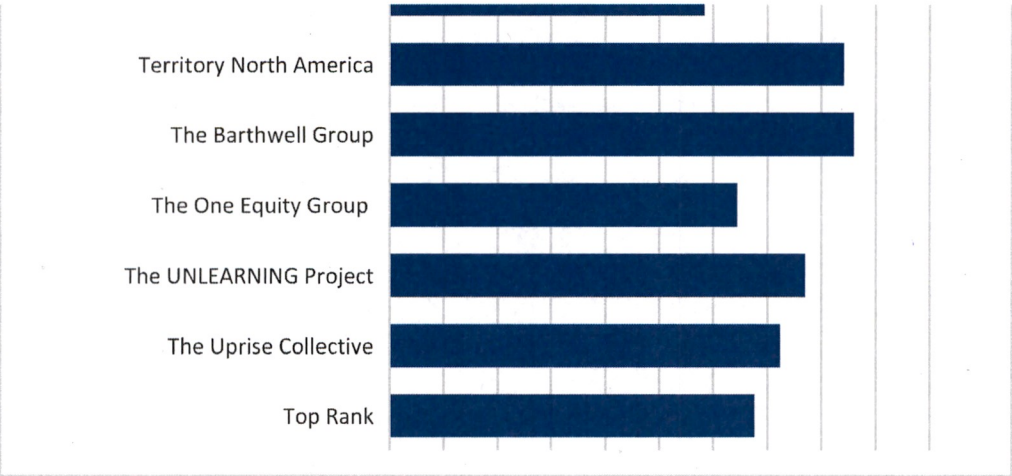
Property Rights: Paradigm Public Affairs shall copyright the materials that it develops for use with Client. All materials developed and used by Paradigm Public Affairs shall be the exclusive property of Paradigm and the Client agrees that it will not disclose any materials to a third party or use materials to conduct its own related services without the prior written consent of Paradigm Public Affairs or is included in the final contract for services. Any material specifically developed for client may be copied, distributed, and reviewed by any employee of client without further charge.

Confidentiality: Paradigm Public Affairs shall regard as confidential and proprietary all client "internal use" and "confidential" information communicated to it by the client in connection with this work plan. Paradigm Public Affairs shall not, without client's prior written consent, at any time use such information for purpose other than in connection with this work plan for the benefit of the client.

Input total scores for
each submission

Entity	Sabrina	Ann	Tighe	Brandon	Rachel	Total	Average score
Acorde Consulting LLC	68	63	45	49	50	275	55
BCG Learning Solutions	89	86	56	76	86	393	79
CCS Learning Academy	95	94	64	84	91	428	86
Field Therapy and Consultin	65	72	41	52	70	300	60
Gallagher	80	72	77	70	67	366	73
IMAN	95	81	67	80	81	404	81
Mattingly Solutions	40	26	53	36	68	223	45
NCXT	100		57	83	90	330	66
Paradigm Public Affairs	95	99	75	90	95	454	91
Peace in Action	95	86	73	91	94	439	88
Racial Equity Group	100	86	73	79	78	416	83
Racing to Equity-EQTYIA	95	95	65	92	91	438	88
Social Current	75	45	58	36	78	292	58
Territory North America	95	84	56	88	98	421	84
The Barthwell Group	90	92	75	91	82	430	86
The One Equity Group	55	81	58	43	85	322	64
The UNLEARNING Project	65	100	62	67	91	385	77
The Uprise Collective	78	87	46	69	82	362	72
Top Rank	88	76	50	57	67	338	68







Ann Seltzer
City of Ashland
20 East Main Street
Ashland, OR 97520

Dear Ann,

Thank you for spending some of your day with us on Monday. Matt and I both enjoyed meeting you, and we're excited about this project. We put our heads together, and I'd like to propose a solution that gives you the flexible scheduling you need, reduces the overall cost of the project, supports the momentum you've started for the year.

Based on what I understood from our conversation, here's what we propose:

1. Reduce the number of hours allocated to quantitative and qualitative data collection and analysis, as well as hours for designing and implementation strategy.
2. Set the target start date for the assessment project launch for September 1, 2023 with the caveat that if the City desires an earlier start, we will accommodate to the best of our ability.
3. Between the time of contract execution and September 1, Paradigm will conduct one on-site visit with the purpose of meeting with leadership to inform them about the project process and goals and dispel myths about DEI work in government. The purpose of this effort is to engage directors in the process, earn their trust, and gain preliminary insight about goals and objectives. During the same visit, we will conduct an open-house style information session for staff to introduce Paradigm, dispel myths, and engage with staff. For this visit, at least 2 Paradigm team members will attend (likely Matt and Tanya, though we encourage the City to consider remote access for other team members).
4. During the interim between contract execution and assessment launch, Paradigm will begin our learning about the City limited to publicly available information and no Ashland government staff support. For your convenience, I'm attaching to this letter our standard document discovery request that we'll formally send when we're ready to move forward with an engagement kick-off meeting. This is for your convenience only, and there are no expectations you respond to this list prior to the assessment launch (but please feel free to send any

information you believe is important or relevant for us to know and as we have time, we'll work off-contract to get up to speed so we can hit the ground running when the time is right).

5. As you know, our services include up to 24 hours (2 hours per month) of after-engagement maintenance. We propose shifting 8 of those hours to pre-engagement consultancy so you and other staff have help when you need it, on your terms, and you maintain support for the project that will begin later this year. That way, when you need resources, we're here – and if you don't, we'll move any hours we didn't expend back to maintenance after the project closes.
6. Our preferred terms and conditions that were included in the proposal identified 30 percent of professional fees payable upon contract execution. Given the circumstances, I feel that since we won't become fully engaged in the project for as much as 6 months, we're asking the City to consider a 20 percent retainer (\$7,975) to ensure we retain space in our project production schedule for Ashland and to cover pre-engagement costs associated with designing and delivering information sessions prior to full project engagement/launch.

I'm including some documents with this letter for your that includes our revised and preferred terms, a revised cost proposal for an overall investment by the City of Ashland for \$39,875 that includes a new column with an estimated timeline, and a revised workplan table. There are 2 changes to the initially proposed workplan:

1. I removed the assessment element that looked at equity in vendor selection and procurement processes which narrowed the scope and overall number of engagement hours.
2. I limited the focus of the SWOT analysis to assessment findings to narrow the scope and number of engagement hours.

I hope we've captured the changes we discussed earlier this week. Of course, if the City needs additional changes, we're always open to having a conversation so we ensure that our processes align with your needs.

Warmly,

A handwritten signature in blue ink, appearing to read 'Tanya Settles', with a stylized flourish at the end.

Tanya Settles, Ph.D.
Chief Executive Officer
Paradigm Public Affairs, LLC

Paradigm Public Affairs Preferred Terms for City of Ashland, OR

Payment: Payment schedule for services described in this statement of work:

- 20% of Professional Fees will be billed and payable upon contract initiation.
- The remaining professional fees and reimbursable expenses will be invoiced monthly until the work plan budget is exhausted.
- All prices are guaranteed for twelve (12) months from the date of execution of the contract

Reimbursements: Travel and out-of-pocket expenses (e.g., airfare, hotel, rental car, ground transportation, parking, mileage, meals, etc.) are included in the agreed upon scope of work as described. Additional requests from the client may result in additional costs that are billed and payable as incurred.

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Revised Investment Proposal

ACTIVITY	PROPOSED TIMELINE	HOURS
Project Launch/Kickoff and Pre-engagement Information Sessions (1 for Leaders, 3 for Staff, may be delivered virtually, on-site, or both)	Month 0-2	10
High Level Organizational Review	Months 1-2	12
Focus Groups, Individual Interviews (requires 2 days on site with 2 consultants), Qualitative Data Analysis	Months 2-3	40
Quantitative Data Collection, Survey	Months 3-4	30
Design/Deployment, Quantitative Data Analysis	Months 4-5	25
Develop Findings & Recommendations; Report Construction	Months 4-5	16
Design Implementation Roadmap and Strategic Plan with Resource Needs and Incremental Touchpoints for Measurement	Months 4-5	16
Project Closure Including Presentations (may be virtual or in-person, TBD)	Month 6	12
TOTAL HOURS		145
HOURLY RATE		\$275
TOTAL PROFESSIONAL FEES		\$39,875

Revised Proposed Workplan and Scope of Work

This revised workplan represents our current understanding of the City of Ashland's immediate needs. We encourage you to view our proposed workplan as a menu. Each of these items can be scaled up, scaled down, or modified to meet unique circumstances. The schedule/timeline corresponds with an overall 6-month engagement and follows a structured and phased approach to activities and deliverables.

DRAFT SCOPE OF WORK		
ENGAGEMENT STEP	ACTIVITIES and DELIVERABLES	TIMELINE
Project Launch	1. Paradigm to conduct 60 min. kick-off meeting with key stakeholders (may be conducted virtually). 2. Paradigm to request organizational documents related to policy and operations throughout the City and information about partnerships with external stakeholders.	Month 1
Phase 1: Building Trust	1. Conduct an information session with Executives, Leaders, and individual contributors to introduce the project and team, answer questions, and dispel myths about DEI.	Months 1-2

	2. Hold 1:1 conversations with leaders to gain insight about vision for assessment and education goals.	
Phase 2: Conduct Culture and Belonging Assessment Human Resources, People Management Review	1. Qualitative data collection (may include 1:1 interviews, focus groups, listening sessions). 2. Collection and analysis of existing quantitative data from previous surveys and other data collection efforts related to organizational culture and workforce engagement. 3. Conduct detailed review of talent management policies, procedures, and practices for the City as a whole and individual departments and entities as needed. 4. Analyze all data (quantitative and qualitative) for themes and findings; report back to City for feedback and collaboration. 5. Develop draft culture report and acquire feedback from City on results. 6. Periodic touchpoint meetings with key stakeholders 7. Culture and Belonging Assessment delivery	Months 2- 4
Phase 3: Design Implementation Strategy to Complement Assessment Recommendations and Finding	1. Prioritize recommendations based on urgency, risk, and ease of execution 2. Categorize recommendations into goals, develop overarching performance measures for each goal. 3. Design/develop implementation steps for each goal. 4. Gain feedback from client as to content, adjust/modify content as needed.	Months 4-5
Phase 4: Develop 18-month DEI Strategic Plan	5. Conduct limited scope SWOT analysis based on assessment findings 6. Based on assessment results, identify core goals and values associated with belonging, culture, and DEI 7. Articulate action plans for core goals. 8. Incorporate incremental measurement and metrics points for process improvement.	Months 5-6
Phase 5: Project Closure	9. Consolidate all deliverables into a single document 10. Conduct final presentations as needed to leadership and elected officials (may be virtual or on site)	Months 6



Council Study Session

April 1, 2024

Agenda Item	Senate Bill 1537 Land Use and UGB Expansion Update	
From	Brandon Goldman	Community Development Director
Contact	Brandon.goldman@ashland.or.us	
Item Type	Requested by Council ☐ Update ☒ Request for Direction ☐ Presentation ☐	

SUMMARY

Senate Bill 1537 in Oregon streamlines housing development by introducing land use amendments and offering cities expanded opportunities for urban growth boundary (UGB) expansion, aiming to facilitate the creation of affordable housing. The bill enhances support for infrastructure development and enforces housing laws to address the state's housing shortage efficiently.

POLICIES, PLANS & GOALS SUPPORTED

Ashland Comprehensive Plan

- Environmental Resources Element (Ch IV):
 - Goal: To preserve forest areas within and around the city for their visual, environmental, wildlife habitat, and water quality values.
- Housing Element (Ch. VI):
 - Goal: Support the creation and preservation of housing that is affordable to low and moderate income households and that is commensurate with the incomes of Ashland's workforce.
 - Goal: Encourage the development of housing in ways that protect the natural environment and encourage development patterns that reduce the effects of climate change.
- Urbanization Element (Ch XII):
 - Goal It is the City of Ashland's goal to maintain a compact urban form and to include and adequate supply of vacant land in the City so as not to hinder natural market forces within the City, and to ensure and orderly and sequential development of land in the City limits.
- Regional Plan Element (Ch XIV):
 - Cities that choose to expand their UGBs into land not designated as a URA will be required to go through the Regional Plan minor or major amendment process prior to or concurrent with any other process.
 - Urban Reserve Management Agreement- Should the City of Ashland at some point in the future opt to identify urban reserves through a minor amendment process, the adoption of an Urban Reserve Management Agreement (URMA) between the City and Jackson County will be required. All development within any future Urban Reserve Areas identified for the City of Ashland would be regulated in accordance with the URMA, and Appendix C of this element is reserved for the approved URMA for Ashland's future Urban Reserve Areas when they are identified.





Council Study Session

BACKGROUND AND ADDITIONAL INFORMATION

Senate Bill 1537 in Oregon, as requested by Governor Tina Kotek and approved during the 2024 Regular Session is intended to be a comprehensive approach to housing policy reform, aimed at streamlining the development process, supporting affordable housing projects, and enforcing housing laws more effectively. The legislation addresses these objectives through the following:

- Establishment of a new Housing Accountability and Production Office to oversee these initiatives. This office is mandated to work in conjunction with the Department of Land Conservation and Development and the Department of Consumer and Business Services. Its key responsibilities include assisting local governments and housing developers with housing laws and enforcing these laws where necessary.
- Enhances funding mechanisms for housing infrastructure and development. The Housing Infrastructure Support Fund provides local governments with support for developing infrastructure that facilitates residential development.
- Expands eligibility for awarding of attorney fees to an applicant whose housing development is appealed to the Land Use Board of Appeals after approval by the local government, in the event the board affirms the decision. The Act clarifies that "attorney fees" also include the cost of processing an application. Provisions apply to decisions for which a notice of intent to appeal is filed on or after January 1, 2025.
- Allows a Land Use application to be reviewed under the standards and criteria in place at the time the application was submitted [current law], or the applicant can request the application be subject to the standards that are operative at the time of the request.
- Mandates more efficient local government processes for approving housing projects when adjustments are requested by developers.
- Provides a streamlined method of urban growth boundary expansions.

The bill also encourages the development of affordable and moderate-income housing by authorizing cities and counties to offer grants to developers for such projects. A revolving loan program is to be developed by the Housing and Community Services Department, offering interest-free loans to cities and counties for funding these grants.

The bill was passed with bipartisan support in both the Senate and the House, indicating a significant step towards addressing Oregon's housing shortage. Provisions for biennial reporting on its progress and effectiveness is scheduled to become operative on July 1, 2025.

Land Use Regulations

Goal post rule. The "goal post rule" in Oregon land use planning refers to the principle that an application for a permit, limited land use decision, or zone change should be reviewed and decided based on the standards and criteria that were applicable at the time the application was first submitted. This rule is outlined in ORS 227.178(3)(a), which ensures that if an application was complete upon first submission, or if the requested additional information was provided within 180 days of the first submission, then the decision to approve or deny should be based on the regulations in effect at the time of the initial submission.



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Under the amended language in SB1537 an applicant can request that their application be subject to the standards that are operative at the time of the request. This change relates to the Grandview Terrace annexation application recently processed in Ashland which was appealed to the Land Use Board of Appeals (LUBA). In that case the appellant argued that the City erred in exempting the project from on-street parking requirements that were in place on the date the application was filed, despite parking requirements having been eliminated by State Climate Friendly and Equitable Communities rules which were signed into law after the date of submission and in effect at the time of final decision. This assignment of error was remanded by LUBA to the City of Ashland for further findings, however the applicant withdrew the application and thus it was never adjudicated by the appeals court.

Due to this state law change, an applicant can now request any newly adopted standards or criteria favorable to the applicant be applied in the review of their application, and the city cannot require the applicant to pay a new application fee to submit a new identical application.

Urban Growth Boundary Expansions (Sections 48-60)

The approved bill allows cities to bring in either 100 acres for cities with a population greater than 25,000 or no more than 50 acres for cities with fewer than 25,000 residents. Ashland has a population of 21,457 according to Portland State University's Population Research Center and thus would be eligible for a one-time expansion of the Urban Growth Boundary (UGB) of up to 50 acres. Despite this potential allowance, there are questions about which cities might take advantage of this provision, given the stringent qualifications and concerns about preserving Oregon's land-use laws, which have historically protected the state's natural resources and limited sprawl.

Under Senate Bill 1537, cities can expand their UGBs if the area meets specific criteria, including the proximity to the existing UGB, designation of the land as an urban reserve area, or to include non-resource lands. Under the current legal framework, the City of Ashland faces unique challenges in pursuing urban growth boundary (UGB) expansions due to its lack of designated Urban Reserve Areas (URAs). This limitation is particularly evident in the case of properties adjacent to Ashland, such as those north of East Main Street, which are zoned as Exclusive Farm Use (EFU) resource lands. Given these zoning classifications, these properties do not qualify for UGB expansion under existing statutes, representing a significant barrier to the city's efforts to address its housing needs through spatial expansion.

To navigate these constraints, a proactive strategy involving collaboration with property owners interested in development could prove pivotal. Specifically, if a property owner adjacent to the current city limits is considering the use of their land for a housing development, they could prepare a conceptual plan for such a project of less than 50 acres. This plan would serve as part of a proposal for the city to request a minor amendment to the Bear Creek Regional Plan, aiming to newly designate a corresponding Urban Reserve Area for Ashland. This approach not only aligns with strategic planning principles but may open a pathway for Ashland to expand its UGB in a manner



Council Study Session

that accommodates future housing projects. The procedural nuances of securing an URA designation through Jackson County, including detailed steps and necessary considerations, are elaborated in the attachment accompanying this communication.

Were Ashland to process a request for a UGB expansion following designation of Urban Reserve Areas, other applicable criteria outlined in SB1537 in Section 50 for a one-time addition to the UGB would be met including:

- not having expanded its UGB in the last 20 years,
- lacking a single ownership tract of land over 20 acres within its UGB,
- having a higher percentage of extremely cost-burdened households compared to the state average,
- having greater than 25% of the rental households as severely rent-burdened

Projects developed within such expanded UGB boundaries will be required to offer 30% of residential units under affordability restrictions for at least 60 years. SB1537 further establishes that a city could perform a land exchange in lieu of a UGB amendment, in which case the residential site being added to the UGB replaces a residential site roughly equivalent in size that is being removed from the UGB.

Housing Land Use Adjustments (Sections 37–43)

Senate Bill 1537 mandates that jurisdictions approve requested “adjustments”, or deviations from existing land use regulations, aimed at facilitating the development of housing projects. This legislative move is designed to ease regulatory barriers, encouraging the growth of housing inventory to address affordability and availability challenges in the state.

A development application can apply for an adjustment under Senate Bill 1537 if the development is for residential use, within urban growth boundaries and annexed into the city, has a residential density of at least 6 units per acre (55(3)(a)(C)), creates new housing units, aims to increase affordability or accessibility, and does not compromise on safety or environmental standards. The application must demonstrate how the adjustments will benefit a housing development that achieves at least one of the following objectives:

- To make the housing development possible by reducing costs or avoiding delays.
- To lower the sale or rental cost of the housing units.
- To increase the total number of housing units.
- To ensure the housing units are affordable for moderate-income households for at least 30 years.
- To ensure at least 20% of units are affordable for low-income households for at least 60 years.
- To add accessibility features that would otherwise be too costly or delayed.
- To support housing affordability through zero equity, limited equity, or shared equity models for a period of 90 years.

These provisions allow for up to 10 distinct “adjustments” to housing development standards under specified conditions, enhancing housing development flexibility.



Council Study Session

Local governments are mandated by Senate Bill 1537 to allow specific adjustments in housing development standards to encourage more flexible and efficient housing development. These adjustments cover various areas, including:

- Up to 10% reduction in minimum side or rear yard setbacks
- Up to 10% reduction in maximum lot coverage.
- Up to 25% reduction in required common areas, open spaces, or landscaping areas.
- Building height can be increased by either one additional story or up to a 20% height increase, whichever is greater.
- Adjustments to facade materials and window areas are not quantified by specific percentages but are intended to offer flexibility within the design standards to accommodate a variety of architectural styles and construction methods, enhancing the feasibility and affordability of residential developments.
- Modifications to parking requirements, minimum and maximum lot sizes to promote additional dwelling units without compromising minimum density. This adjustment is less applicable in Ashland as we have removed all parking minimums from our land use code.

These “adjustments” do not permit an applicant to request uses which are otherwise prohibited within a specific zoning designation, nor are deviations permitted that relate to building and fire safety, air quality, stormwater requirements, and environmental protections. The law specifies that decisions on adjustment applications are limited land use decisions only the applicant may appeal. These provisions have an operational date of January 1, 2025.

Limited Land Use Decisions (Sections 44 – 47) Includes approval or denial of applications for replats, property line adjustments, and extension alterations or expansions of a nonconforming use in the definition of “limited land use decision.” Directs cities to only apply procedures specified in ORS 197.195 to limited land use decisions. Places operative date on these provisions of January 1, 2025; repeals them January 2, 2032.

FISCAL IMPACTS

Expanding a city's urban growth boundaries (UGB) introduces financial unpredictability, primarily due to indeterminate future infrastructure costs. The initial investment for planning and constructing essential infrastructure can be substantial. Although widening the UGB has the potential to boost tax revenues, it concurrently incurs ongoing expenses for the upkeep of new infrastructure, including roads, utilities, and services. Forecasting these financial implications is challenging, given the variability in economic conditions, demographic shifts, and fluctuations in housing demand.

DISCUSSION QUESTIONS

Does the City Council have any questions or comments regarding the local implications of the passage of Senate Bill 1537 and potential for an expedited Urban Growth Boundary expansion?



Council Study Session

SUGGESTED NEXT STEPS

The City could take several strategic steps to address housing affordability in light of SB 1537. In evaluating land use code language to be developed in relation to Climate Friendly areas, the City should contemplate the impact of the Housing Land Use Adjustment provisions in SB1537.

In relation to a UGB expansion request It is crucial to assess whether property owners adjacent to the Urban Growth Boundary (UGB) are contemplating housing development proposals that comply with SB 1537's affordability criteria. If a property owner were interested in preparing a general concept plan, the City could initiate discussions with Jackson County to comprehensively understand the Urban Reserve Area Designation Process and the intricacies of the Greater Bear Creek Regional Plan Minor Amendment process, especially in the context of the newly passed SB 1537.

REFERENCES & ATTACHMENTS

- 2024 Senate Bill 1537
<https://olis.oregonlegislature.gov/liz/2024R1/Downloads/MeasureDocument/SB1537/Enrolled>

Enrolled
Senate Bill 1537

Printed pursuant to Senate Interim Rule 213.28 by order of the President of the Senate in conformance with pre-session filing rules, indicating neither advocacy nor opposition on the part of the President (at the request of Governor Tina Kotek for Office of the Governor)

CHAPTER

AN ACT

Relating to housing; creating new provisions; amending ORS 183.471, 197.015, 197.195, 197.335, 197.843, 215.427, 227.178 and 455.770; and prescribing an effective date.

Be It Enacted by the People of the State of Oregon:

HOUSING ACCOUNTABILITY AND PRODUCTION OFFICE

SECTION 1. Housing Accountability and Production Office. (1) The Department of Land Conservation and Development and the Department of Consumer and Business Services shall enter into an interagency agreement to establish and administer the Housing Accountability and Production Office.

(2) The Housing Accountability and Production Office shall:

(a) Provide technical assistance, including assistance through grants, to local governments to:

(A) Comply with housing laws;

(B) Reduce permitting and land use barriers to housing production; and

(C) Support reliable and effective implementation of local procedures and standards relating to the approval of residential development projects.

(b) Serve as a resource, which includes providing responses to requests for technical assistance with complying with housing laws, to:

(A) Local governments, as defined in ORS 174.116; and

(B) Applicants for land use and building permits for residential development who are experiencing permitting and land use barriers related to housing production.

(c) Investigate and respond to complaints of violations of housing laws under section 2 of this 2024 Act.

(d) Establish best practices related to model codes, typical drawings and specifications as described in ORS 455.062, procedures and practices by which local governments may comply with housing laws.

(e) Provide optional mediation of active disputes relating to housing laws between a local government and applicants for land use and building permits for residential development, including mediation under ORS 197.860.

(f) Coordinate agencies that are involved in the housing development process, including, but not limited to, the Department of Land Conservation and Development, Department of

Consumer and Business Services, Housing and Community Services Department and Oregon Business Development Department, to enable the agencies to support local governments and applicants for land use and building permits for residential development by identifying state agency technical and financial resources that can address identified housing development and feasibility barriers.

(g) Establish policy and funding priorities for state agency resources and programs for the purpose of addressing barriers to housing production, including, but not limited to, making recommendations for moneys needed for the purposes of section 35 of this 2024 Act.

(3) The Land Conservation and Development Commission and the Department of Consumer and Business Services shall coordinate in adopting, amending or repealing rules for:

(a) Carrying out the respective responsibilities of the departments and the office under sections 1 to 5 of this 2024 Act.

(b) Model codes, development plans, procedures and practices by which local governments may comply with housing laws.

(c) Establishing standards by which complaints are investigated and pursued.

(4) The office shall prioritize assisting local governments in voluntarily undertaking changes to come into compliance with housing laws.

(5) As used in sections 1 to 5 of this 2024 Act:

(a) "Housing law" means ORS chapter 197A and ORS 92.010 to 92.192, 92.830 to 92.845, 197.360 to 197.380, 197.475 to 197.493, 197.505 to 197.540, 197.660 to 197.670, 197.748, 215.402 to 215.438, 227.160 to 227.186, 455.148, 455.150, 455.152, 455.153, 455.156, 455.157, 455.165, 455.170, 455.175, 455.180, 455.185 to 455.198, 455.200, 455.202 to 455.208, 455.210, 455.220, 455.465 and 455.467 and administrative rules implementing those laws, to the extent that the law or rule imposes a mandatory duty on a local government or its officers, employees or agents and the application of the law or rule applies to residential development or pertains to a permit for a residential use or a division of land for residential purposes.

(b) "Residential" includes mixed-use residential development.

SECTION 2. Office responses to violations of housing laws. (1) The Housing Accountability and Production Office shall establish a form or format through which the office receives allegations of local governments' violations of housing laws that impact housing production. For complaints that relate to a specific development project, the office may receive complaints only from the project applicant. For complaints not related to a specific development project, the office may receive complaints from any person within the local government's jurisdiction or the Department of Land Conservation and Development or the Department of Consumer and Business Services.

(2)(a) Except as provided in paragraph (c) of this subsection, the office shall investigate suspected violations of housing laws or violations credibly alleged under subsection (1) of this section.

(b) The office shall develop consistent procedures to evaluate and determine the credibility of alleged violations of housing laws.

(c) If a complainant has filed a notice of appeal with the Land Use Board of Appeals or has initiated private litigation regarding any aspect of the application decision that was alleged to have been the subject of the housing law violation, the office may not further participate in the specific complaint or its appeal, except for:

(A) Providing agency briefs, including briefs under ORS 197.830 (8), to the board or the court;

(B) Providing technical assistance to the local government unrelated to the resolution of the specific complaint; or

(C) Mediation at the request of the local government and complainant, including mediation under ORS 197.860.

(3)(a) If the office has a reasonable basis to conclude that a violation was or is being committed, the office shall deliver written warning notice to the local government specifying

the violation and any authority under this section that the office intends to invoke if the violation continues or is not remedied. The notice must include an invitation to address or remedy the suspected violation through mediation, the execution of a compliance agreement to voluntarily remedy the situation, the adoption of suitable model codes developed by the office under section 1 (3)(b) of this 2024 Act or other remedies suitable to the specific violation.

(b) The office shall prioritize technical assistance funding to local governments that agree to comply with housing laws under this subsection.

(c) A determination by the office is not a legislative, judicial or quasi-judicial decision.

(4) No earlier than 60 days after a warning notice is delivered under subsection (3) of this section, the office may:

(a) Initiate a request for an enforcement order of the Land Conservation and Development Commission by delivering a notice of request under section 3 (3) of this 2024 Act.

(b) Seek a court order against a local government as described under ORS 455.160 (3) without being adversely affected or serving the demand as described in ORS 455.160 (2).

(c) Notwithstanding ORS 197.090 (2)(b) to (e), participate in and seek review of a matter under ORS 197.090 (2)(a) that pertains to housing laws without the notice or consent of the commission. No less than once every two years, the office shall report to the commission on the matters in which the office participated under this paragraph.

(d) Except regarding matters under the exclusive jurisdiction of the Land Use Board of Appeals, apply to a circuit court for an order compelling compliance with any housing law. If the court finds that the defendant is not complying with a housing law, the court may grant an injunction requiring compliance.

(5) The office may not, in the name of the office, exercise the authority of the Department of Land Conservation and Development under ORS 197A.130.

(6) The office shall send notice to each complainant under subsection (1) of this section at the time that the office:

(a) Takes any action under subsection (3) or (4) of this section; or

(b) Has determined that it will not take further actions or make further investigations.

(7) The actions authorized of the office under this section are in addition to and may be exercised in conjunction with any other investigative or enforcement authority that may be exercised by the Department of Land Conservation and Development, the Land Conservation and Development Commission or the Department of Consumer and Business Services.

(8) Nothing in this section:

(a) Amends the jurisdiction of the Land Use Board of Appeals or of a circuit court;

(b) Creates a new cause of action; or

(c) Tolls or extends:

(A) The statute of limitations for any claim; or

(B) The deadline for any appeal or other action.

SECTION 3. Office enforcement orders. (1) The Housing Accountability and Production Office may request an enforcement order under section 2 (4)(a) of this 2024 Act requiring that a local government take action necessary to bring its comprehensive plan, land use regulation, limited land use decisions or other land use decisions or actions into compliance with a housing law, except for a housing law that pertains to the state building code or the administration of the code.

(2) Except as otherwise provided in this section, a request for an enforcement order by the office is subject to the applicable provisions of ORS 197.335 and ORS chapter 183 and is not subject to ORS 197.319, 197.324 or 197.328.

(3) The office shall make a request for an enforcement order under this section by delivering a notice to the local government that states the grounds for initiation and summarizes the procedures for the enforcement order proceeding along with a copy of the notice

to the Land Conservation and Development Commission. A decision of the office to initiate an enforcement order is not subject to appeal.

(4) After receiving notice of an enforcement order request under subsection (3) of this section, the local government shall deliver a notice to an affected applicant, if any, in substantially the following form:

NOTICE: The Housing Accountability and Production Office has found good cause for an enforcement proceeding against _____ (name of local government). An enforcement order may be adopted that could limit, prohibit or require the application of specified criteria to any action authorized by this decision but not applied for until after the adoption of the enforcement order. Future applications for building permits or time extensions may be affected.

(5) Within 14 days after receipt by the commission of the notice under subsection (3) of this section, the Director of the Department of Land Conservation and Development shall assign the enforcement order proceedings to a hearings officer who is:

(a) An administrative law judge assigned under ORS 183.635; or

(b) A hearings officer randomly selected from a pool of officers appointed by the commission to review proceedings initiated under this section.

(6) The hearings officer shall schedule a contested case hearing within 60 days of the delivery of the notice to the commission under subsection (3) of this section.

(7)(a) The hearings officer shall prepare a proposed enforcement order or order of dismissal, including recommended findings and conclusions of law.

(b) A proposed enforcement order may require the local government to take any necessary action to comply with housing laws that is suitable to address the basis for the proposed enforcement order, including requiring the adoption or application of suitable models that have been developed by the office under section 1 (3)(b) of this 2024 Act.

(c) The hearings officer must issue and serve the proposed enforcement order on the office and all parties to the hearing within 30 days of the date the record closed.

(8)(a) The proposed enforcement order becomes a final order of the commission 14 days after service on the office and all parties to the hearing, unless the office or a party to the hearing appeals the proposed enforcement order to the commission prior to the proposed enforcement order becoming final.

(b) If the proposed enforcement order is appealed, the commission shall consider the matter at:

(A) Its next regularly scheduled meeting; or

(B) If the appeal is made 45 or fewer days prior to the next regularly scheduled meeting, at the following regularly scheduled meeting or a special meeting held earlier.

(9) The commission shall affirm, affirm with modifications or reverse the proposed enforcement order. The commission shall issue a final order no later than 30 days after the meeting at which it considered the matter.

(10) The commission may adopt rules administering this section, including rules related to standing, preserving issues for commission review or other provisions concerning the commission's scope and standard for review of proposed enforcement orders under this section.

SECTION 4. Housing Accountability and Production Office Fund. (1) The Housing Accountability and Production Office Fund is established in the State Treasury, separate and distinct from the General Fund.

(2) The Housing Accountability and Production Office Fund consists of moneys appropriated, allocated, deposited or transferred to the fund by the Legislative Assembly or otherwise.

(3) Interest earned by the fund shall be credited to the fund.

(4) Moneys in the fund are continuously appropriated to the Department of Land Conservation and Development to administer the fund, to operate the Housing Accountability and Production Office and to implement sections 1 to 5 of this 2024 Act.

SECTION 5. Reporting. On or before September 15, 2026, the Housing Accountability and Production Office shall:

(1) Contract with one or more organizations possessing relevant expertise to produce a report identifying improvements in the local building plan review approval, design review approval, land use, zoning and permitting processes, including but not limited to plan review approval timelines, process efficiency, local best practices and other ways to accelerate and improve the efficiency of the development process for construction, with a focus on increasing housing production.

(2) Produce a report based on a study by the office of state and local timelines and standards related to public works and building permit application review and develop recommendations for changes to reduce complexity, delay or costs that inhibit housing production, including an evaluation of their effect on the feasibility of varying housing types and affordability levels.

(3) Produce a report summarizing state agency plans, policies and programs related to reducing or eliminating regulatory barriers to the production of housing. The report must also include recommendations on how state agencies may prioritize resources and programs to increase housing production.

(4) Provide the reports under subsections (1) to (3) of this section to one or more appropriate interim committees of the Legislative Assembly in the manner provided in ORS 192.245.

SECTION 6. Sunset. Section 5 of this 2024 Act is repealed on January 2, 2027.

SECTION 7. Operative and applicable dates. (1) Sections 2 and 3 of this 2024 Act become operative on July 1, 2025.

(2) Sections 2 and 3 of this 2024 Act apply only to violations of housing laws occurring on or after July 1, 2025.

(3) The Department of Land Conservation and Development and Department of Consumer and Business Services may take any action before the operative date specified in subsection (1) of this section that is necessary for the departments or the Housing Accountability and Production Office to exercise, on and after the operative date, all of the duties, functions and powers conferred by sections 1 to 5, 35, 39 and 46 of this 2024 Act.

OPTING IN TO AMENDED HOUSING REGULATIONS

SECTION 8. ORS 215.427 is amended to read:

215.427. (1) Except as provided in subsections (3), (5) and (10) of this section, for land within an urban growth boundary and applications for mineral aggregate extraction, the governing body of a county or its designee shall take final action on an application for a permit, limited land use decision or zone change, including resolution of all appeals under ORS 215.422, within 120 days after the application is deemed complete. The governing body of a county or its designee shall take final action on all other applications for a permit, limited land use decision or zone change, including resolution of all appeals under ORS 215.422, within 150 days after the application is deemed complete, except as provided in subsections (3), (5) and (10) of this section.

(2) If an application for a permit, limited land use decision or zone change is incomplete, the governing body or its designee shall notify the applicant in writing of exactly what information is missing within 30 days of receipt of the application and allow the applicant to submit the missing

information. The application shall be deemed complete for the purpose of subsection (1) of this section and ORS 197A.470 upon receipt by the governing body or its designee of:

- (a) All of the missing information;
- (b) Some of the missing information and written notice from the applicant that no other information will be provided; or

(c) Written notice from the applicant that none of the missing information will be provided.

(3)(a) If the application was complete when first submitted or the applicant submits additional information[*as described in subsection (2) of this section,*] within 180 days of the date the application was first submitted [*and the county has a comprehensive plan and land use regulations acknowledged under ORS 197.251*], approval or denial of the application [*shall be based*] **must be based:**

(A) Upon the standards and criteria that were applicable at the time the application was first submitted[.]; or

(B) **For an application relating to development of housing, upon the request of the applicant, those standards and criteria that are operative at the time of the request.**

(b) **If an applicant requests review under different standards as provided in paragraph (a)(B) of this subsection:**

(A) **For the purposes of this section, any applicable timelines for completeness review and final decisions restart as if a new application were submitted on the date of the request;**

(B) **For the purposes of this section and ORS 197A.470 the application is not deemed complete until:**

(i) **The county determines that additional information is not required under subsection (2) of this section; or**

(ii) **The applicant makes a submission under subsection (2) of this section in response to a county's request;**

(C) **A county may deny a request under paragraph (a)(B) of this subsection if:**

(i) **The county has issued a public notice of the application; or**

(ii) **A request under paragraph (a)(B) of this subsection was previously made; and**

(D) **The county may not require that the applicant:**

(i) **Pay a fee, except to cover additional costs incurred by the county to accommodate the request;**

(ii) **Submit a new application or duplicative information, unless information resubmittal is required because the request affects or changes information in other locations in the application or additional narrative is required to understand the request in context; or**

(iii) **Repeat redundant processes or hearings that are inapplicable to the change in standards or criteria.**

[(b) If the application is for industrial or traded sector development of a site identified under section 12, chapter 800, Oregon Laws 2003, and proposes an amendment to the comprehensive plan, approval or denial of the application must be based upon the standards and criteria that were applicable at the time the application was first submitted, provided the application complies with paragraph (a) of this subsection.]

(4) On the 181st day after first being submitted, the application is void if the applicant has been notified of the missing information as required under subsection (2) of this section and has not submitted:

- (a) All of the missing information;
- (b) Some of the missing information and written notice that no other information will be provided; or

(c) Written notice that none of the missing information will be provided.

(5) The period set in subsection (1) of this section or the 100-day period set in ORS 197A.470 may be extended for a specified period of time at the written request of the applicant. The total of all extensions, except as provided in subsection (10) of this section for mediation, may not exceed 215 days.

(6) The period set in subsection (1) of this section applies:

(a) Only to decisions wholly within the authority and control of the governing body of the county; and

(b) Unless the parties have agreed to mediation as described in subsection (10) of this section or ORS 197.319 (2)(b).

(7) Notwithstanding subsection (6) of this section, the period set in subsection (1) of this section and the 100-day period set in ORS 197A.470 do not apply to:

(a) A decision of the county making a change to an acknowledged comprehensive plan or a land use regulation that is submitted to the Director of the Department of Land Conservation and Development under ORS 197.610; or

(b) A decision of a county involving an application for the development of residential structures within an urban growth boundary, where the county has tentatively approved the application and extends these periods by no more than seven days in order to assure the sufficiency of its final order.

(8) Except when an applicant requests an extension under subsection (5) of this section, if the governing body of the county or its designee does not take final action on an application for a permit, limited land use decision or zone change within 120 days or 150 days, as applicable, after the application is deemed complete, the county shall refund to the applicant either the unexpended portion of any application fees or deposits previously paid or 50 percent of the total amount of such fees or deposits, whichever is greater. The applicant is not liable for additional governmental fees incurred subsequent to the payment of such fees or deposits. However, the applicant is responsible for the costs of providing sufficient additional information to address relevant issues identified in the consideration of the application.

(9) A county may not compel an applicant to waive the period set in subsection (1) of this section or to waive the provisions of subsection (8) of this section or ORS 197A.470 or 215.429 as a condition for taking any action on an application for a permit, limited land use decision or zone change except when such applications are filed concurrently and considered jointly with a plan amendment.

(10) The periods set forth in subsections (1) and (5) of this section and ORS 197A.470 may be extended by up to 90 additional days, if the applicant and the county agree that a dispute concerning the application will be mediated.

SECTION 9. ORS 227.178 is amended to read:

227.178. (1) Except as provided in subsections (3), (5) and (11) of this section, the governing body of a city or its designee shall take final action on an application for a permit, limited land use decision or zone change, including resolution of all appeals under ORS 227.180, within 120 days after the application is deemed complete.

(2) If an application for a permit, limited land use decision or zone change is incomplete, the governing body or its designee shall notify the applicant in writing of exactly what information is missing within 30 days of receipt of the application and allow the applicant to submit the missing information. The application shall be deemed complete for the purpose of subsection (1) of this section or ORS 197A.470 upon receipt by the governing body or its designee of:

(a) All of the missing information;

(b) Some of the missing information and written notice from the applicant that no other information will be provided; or

(c) Written notice from the applicant that none of the missing information will be provided.

(3)(a) If the application was complete when first submitted or the applicant submits the requested additional information within 180 days of the date the application was first submitted [*and the city has a comprehensive plan and land use regulations acknowledged under ORS 197.251*], approval or denial of the application [*shall*] **must** be based:

(A) Upon the standards and criteria that were applicable at the time the application was first submitted[.]; or

(B) **For an application relating to development of housing, upon the request of the applicant, those standards and criteria that are operative at the time of the request.**

(b) If an applicant requests review under different standards as provided in paragraph (a)(B) of this subsection:

(A) For the purposes of this section, any applicable timelines for completeness review and final decisions restart as if a new application were submitted on the date of the request;

(B) For the purposes of this section and ORS 197A.470 the application is not deemed complete until:

(i) The city determines that additional information is not required under subsection (2) of this section; or

(ii) The applicant makes a submission under subsection (2) of this section in response to a city's request;

(C) A city may deny a request under paragraph (a)(B) of this subsection if:

(i) The city has issued a public notice of the application; or

(ii) A request under paragraph (a)(B) of this subsection was previously made; and

(D) The city may not require that the applicant:

(i) Pay a fee, except to cover additional costs incurred by the city to accommodate the request;

(ii) Submit a new application or duplicative information, unless information resubmittal is required because the request affects or changes information in other locations in the application or additional narrative is required to understand the request in context; or

(iii) Repeat redundant processes or hearings that are inapplicable to the change in standards or criteria.

[(b) If the application is for industrial or traded sector development of a site identified under section 12, chapter 800, Oregon Laws 2003, and proposes an amendment to the comprehensive plan, approval or denial of the application must be based upon the standards and criteria that were applicable at the time the application was first submitted, provided the application complies with paragraph (a) of this subsection.]

(4) On the 181st day after first being submitted, the application is void if the applicant has been notified of the missing information as required under subsection (2) of this section and has not submitted:

(a) All of the missing information;

(b) Some of the missing information and written notice that no other information will be provided; or

(c) Written notice that none of the missing information will be provided.

(5) The 120-day period set in subsection (1) of this section or the 100-day period set in ORS 197A.470 may be extended for a specified period of time at the written request of the applicant. The total of all extensions, except as provided in subsection (11) of this section for mediation, may not exceed 245 days.

(6) The 120-day period set in subsection (1) of this section applies:

(a) Only to decisions wholly within the authority and control of the governing body of the city; and

(b) Unless the parties have agreed to mediation as described in subsection (11) of this section or ORS 197.319 (2)(b).

(7) Notwithstanding subsection (6) of this section, the 120-day period set in subsection (1) of this section and the 100-day period set in ORS 197A.470 do not apply to:

(a) A decision of the city making a change to an acknowledged comprehensive plan or a land use regulation that is submitted to the Director of the Department of Land Conservation and Development under ORS 197.610; or

(b) A decision of a city involving an application for the development of residential structures within an urban growth boundary, where the city has tentatively approved the application and extends these periods by no more than seven days in order to assure the sufficiency of its final order.

(8) Except when an applicant requests an extension under subsection (5) of this section, if the governing body of the city or its designee does not take final action on an application for a permit,

limited land use decision or zone change within 120 days after the application is deemed complete, the city shall refund to the applicant, subject to the provisions of subsection (9) of this section, either the unexpended portion of any application fees or deposits previously paid or 50 percent of the total amount of such fees or deposits, whichever is greater. The applicant is not liable for additional governmental fees incurred subsequent to the payment of such fees or deposits. However, the applicant is responsible for the costs of providing sufficient additional information to address relevant issues identified in the consideration of the application.

(9)(a) To obtain a refund under subsection (8) of this section, the applicant may either:

(A) Submit a written request for payment, either by mail or in person, to the city or its designee;

or

(B) Include the amount claimed in a mandamus petition filed under ORS 227.179. The court shall award an amount owed under this section in its final order on the petition.

(b) Within seven calendar days of receiving a request for a refund, the city or its designee shall determine the amount of any refund owed. Payment, or notice that no payment is due, shall be made to the applicant within 30 calendar days of receiving the request. Any amount due and not paid within 30 calendar days of receipt of the request shall be subject to interest charges at the rate of one percent per month, or a portion thereof.

(c) If payment due under paragraph (b) of this subsection is not paid within 120 days after the city or its designee receives the refund request, the applicant may file an action for recovery of the unpaid refund. In an action brought by a person under this paragraph, the court shall award to a prevailing applicant, in addition to the relief provided in this section, reasonable attorney fees and costs at trial and on appeal. If the city or its designee prevails, the court shall award reasonable attorney fees and costs at trial and on appeal if the court finds the petition to be frivolous.

(10) A city may not compel an applicant to waive the 120-day period set in subsection (1) of this section or to waive the provisions of subsection (8) of this section or ORS 197A.470 or 227.179 as a condition for taking any action on an application for a permit, limited land use decision or zone change except when such applications are filed concurrently and considered jointly with a plan amendment.

(11) The periods set forth in subsections (1) and (5) of this section and ORS 197A.470 may be extended by up to 90 additional days, if the applicant and the city agree that a dispute concerning the application will be mediated.

ATTORNEY FEES FOR NEEDED HOUSING CHALLENGES

SECTION 10. ORS 197.843 is amended to read:

197.843. (1) The Land Use Board of Appeals shall award attorney fees to:

(a) An applicant whose application is only for the development of affordable housing[, *as defined in ORS 197A.445, or publicly supported housing, as defined in ORS 456.250*], if the board [*affirms a quasi-judicial land use decision approving the application or*] reverses a quasi-judicial land use decision denying the application[.];

(b) **An applicant whose application is only for the development of housing and was approved by the local government, if the board affirms the decision; and**

(c) **The local government that approved a quasi-judicial land use decision described in paragraph (b) of this subsection.**

(2) For housing other than affordable housing, the attorney fees specified in subsection (1)(b) and (c) of this section apply only within urban growth boundaries.

[(2)] (3) A party who was awarded attorney fees under this section or ORS 197.850 shall repay the fees plus any interest from the time of the judgment if the property upon which the fees are based is developed for a use other than [*affordable*] **the proposed** housing.

[(3)] (4) As used in this section:

[(a) "*Applicant*" includes:]

[(A) An applicant with a funding reservation agreement with a public funder for the purpose of developing publicly supported housing;]

[(B) A housing authority, as defined in ORS 456.005;]

[(C) A qualified housing sponsor, as defined in ORS 456.548;]

[(D) A religious nonprofit corporation;]

[(E) A public benefit nonprofit corporation whose primary purpose is the development of affordable housing; and]

[(F) A local government that approved the application of an applicant described in this paragraph.]

(a) “Affordable housing” means affordable housing, as defined in ORS 197A.445, or publicly supported housing, as defined in ORS 456.250.

(b) “Attorney fees” includes prelitigation legal expenses, including preparing and processing the application and supporting the application in local land use hearings or proceedings.

SECTION 11. Operative and applicable dates. (1) The amendments to ORS 197.843 by section 10 of this 2024 Act become operative on January 1, 2025.

(2) The amendments to ORS 197.843 by section 10 of this 2024 Act apply to decisions for which a notice of intent to appeal under ORS 197.830 is filed on or after January 1, 2025.

INFRASTRUCTURE SUPPORTING HOUSING PRODUCTION

SECTION 12. Sections 13 and 14 of this 2024 Act are added to and made a part of ORS chapter 285A.

SECTION 13. Capacity and support for infrastructure planning. The Oregon Business Development Department shall provide capacity and support for infrastructure planning to municipalities to enable them to plan and finance infrastructure for water, sewers and sanitation, stormwater and transportation consistent with opportunities to produce housing units at densities defined in section 55 (3)(a)(C) of this 2024 Act. “Capacity and support” includes assistance with local financing opportunities, state and federal grant navigation, writing, review and administration, resource sharing, regional collaboration support and technical support, including engineering and design assistance and other capacity or support as the department may designate by rule.

SECTION 14. Housing Infrastructure Support Fund. (1) The Housing Infrastructure Support Fund is established in the State Treasury, separate and distinct from the General Fund.

(2) The Housing Infrastructure Support Fund consists of moneys appropriated, allocated, deposited or transferred to the fund by the Legislative Assembly or otherwise.

(3) Interest earned by the fund shall be credited to the fund.

(4) Moneys in the fund are continuously appropriated to the Oregon Business Development Department to administer the fund and to implement section 13 of this 2024 Act.

SECTION 15. Sunset. (1) Sections 13 and 14 of this 2024 Act are repealed on January 2, 2030.

(2) Any unobligated moneys in the Housing Infrastructure Support Fund on January 2, 2030, must be transferred to the General Fund for general governmental purposes.

SECTION 16. Infrastructure recommendation and reporting. (1) On or before December 31, 2024, the Department of Land Conservation and Development, in consultation with the Housing and Community Services Department, the Oregon Business Development Department and other agencies that fund and support local infrastructure projects, shall submit a report to an appropriate interim committee of the Legislative Assembly in the manner provided in ORS 192.245 that includes a list of key considerations and metrics the Legislative Assembly could use to evaluate, screen and prioritize proposed local infrastructure projects that facilitate and support housing within an urban growth boundary.

(2) The Department of Land Conservation and Development shall facilitate an engagement process with local governments, tribal nations, the development community, housing advocates, conservation groups, property owners, community partners and other interested parties to inform the list of key considerations and metrics.

NOTE: Sections 17 through 23 were deleted by amendment. Subsequent sections were not re-numbered.

HOUSING PROJECT REVOLVING LOANS

SECTION 24. As used in sections 24 to 35 of this 2024 Act:

(1) “Assessor,” “tax collector” and “treasurer” mean the individual filling that county office so named or any county officer performing the functions of the office under another name.

(2) “County tax officers” and “tax officers” mean the assessor, tax collector and treasurer of a county.

(3) “Eligible costs” means the following costs associated with an eligible housing project:

- (a) Infrastructure costs, including, but not limited to, system development charges;
- (b) Predevelopment costs;
- (c) Construction costs; and
- (d) Land write-downs.

(4) “Eligible housing project” means a project to construct housing, or to convert a building from a nonresidential use to housing, that is:

(a) Affordable to households with low income or moderate income as those terms are defined in ORS 458.610;

(b) If for-sale property, a single-family dwelling, middle housing as defined in ORS 197A.420 or a multifamily dwelling that is affordable as described in paragraph (a) of this subsection continuously from initial sale for a period, to be established by the Housing and Community Services Department and the sponsoring jurisdiction, of not less than the term of the loan related to the for-sale property; or

(c) If rental property:

(A)(i) Middle housing as defined in ORS 197A.420;

(ii) A multifamily dwelling;

(iii) An accessory dwelling unit as defined in ORS 215.501; or

(iv) Any other form of affordable housing or moderate income housing; and

(B) Rented at a monthly rate that is affordable to households with an annual income not greater than 120 percent of the area median income, such affordability to be maintained for a period, to be established by the department and the sponsoring jurisdiction, of not less than the term of the loan related to the rental property.

(5) “Eligible housing project property” means the taxable real and personal property constituting the improvements of an eligible housing project.

(6) “Fee payer” means, for any property tax year, the person responsible for paying ad valorem property taxes on eligible housing project property to which a grant awarded under section 29 of this 2024 Act relates.

(7) “Fire district taxes” means property taxes levied by fire districts within whose territory all or a portion of eligible housing project property is located.

(8) “Nonexempt property” means property other than eligible housing project property in the tax account that includes eligible housing project property.

(9) “Nonexempt taxes” means the ad valorem property taxes assessed on nonexempt property.

(10) “Sponsoring jurisdiction” means:

(a)(A) A city with respect to eligible housing projects located within the city boundaries;
or

(B) A county with respect to eligible housing projects located in urban unincorporated areas of the county; or

(b) The governing body of a city or county described in paragraph (a) of this subsection.

SECTION 25. (1)(a) A sponsoring jurisdiction may adopt by ordinance or resolution a program under which the sponsoring jurisdiction awards grants to developers for eligible costs.

(b) Before adopting the program, the sponsoring jurisdiction shall consult with the governing body of any city or county with territory inside the boundaries of the sponsoring jurisdiction.

(2) The ordinance or resolution shall set forth:

(a) The kinds of eligible housing projects for which a developer may seek a grant under the program; and

(b) Any eligibility requirements to be imposed on projects and developers in addition to those required under sections 24 to 35 of this 2024 Act.

(3) A grant award:

(a) Shall be in the amount determined under section 26 (3) of this 2024 Act; and

(b) May include reimbursement for eligible costs incurred for up to 12 months preceding the date on which the eligible housing project received local site approval.

(4) Eligible housing project property for which a developer receives a grant for eligible costs may not be granted any exemption, partial exemption or special assessment of ad valorem property taxes other than the exemption granted under section 30 of this 2024 Act.

(5) A sponsoring jurisdiction may amend an ordinance or resolution adopted pursuant to this section at any time. The amendments shall apply only to applications submitted under section 26 of this 2024 Act on or after the effective date of the ordinance or resolution.

SECTION 26. (1)(a) A sponsoring jurisdiction that adopts a grant program pursuant to section 25 of this 2024 Act shall prescribe an application process, including forms and deadlines, by which a developer may apply for a grant with respect to an eligible housing project.

(b) An application for a grant must include, at a minimum:

(A) A description of the eligible housing project;

(B) A detailed explanation of the affordability of the eligible housing project;

(C) An itemized description of the eligible costs for which the grant is sought;

(D) The proposed schedule for completion of the eligible housing project;

(E) A project pro forma demonstrating that the project would not be economically feasible but for receipt of the grant moneys; and

(F) Any other information, documentation or attestation that the sponsoring jurisdiction considers necessary or convenient for the application review process.

(c)(A) The project pro forma under paragraph (b)(E) of this subsection shall be on a form provided to the sponsoring jurisdiction by the Housing and Community Services Department and made available to grant applicants.

(B) The department may enter into an agreement with a third party to develop the project pro forma template.

(2)(a) The review of an application under this section shall be completed within 90 days following the receipt of the application by the sponsoring jurisdiction.

(b) Notwithstanding paragraph (a) of this subsection:

(A) The sponsoring jurisdiction may in its sole discretion extend the review process beyond 90 days if the volume of applications would make timely completion of the review process unlikely.

(B) The sponsoring jurisdiction may consult with a developer about the developer's application, and the developer, after the consultation, may amend the application on or before a deadline set by the sponsoring jurisdiction.

(3) The sponsoring jurisdiction shall:

(a) Review each application;

(b) Request that the county tax officers provide to the sponsoring jurisdiction the amounts determined under section 27 of this 2024 Act;

(c) Set the term of the loan that will fund the grant award for a period not to exceed the greater of:

(A) Ten years following July 1 of the first property tax year for which the completed eligible housing project property is estimated to be taken into account; or

(B) If agreed upon by the sponsoring jurisdiction and the department, the period required for the loan principal and fees to be repaid in full;

(d) Set the amount of the grant that may be awarded to the developer under section 29 (2) of this 2024 Act by multiplying the increment determined under section 27 (1)(c) of this 2024 Act by the term of the loan; and

(e)(A) Provisionally approve the application as submitted;

(B) Provisionally approve the application on terms other than those requested in the application; or

(C) Reject the application.

(4)(a) The sponsoring jurisdiction shall forward provisionally approved applications to the Housing and Community Services Department.

(b) The department shall review the provisionally approved applications for completeness, including, but not limited to, the completeness of the project pro forma submitted with the application under subsection (1)(b)(E) of this section and the amounts computed under section 27 (1) of this 2024 Act and notify the sponsoring jurisdiction of its determination.

(5)(a) If the department has determined that a provisionally approved application is incomplete, the sponsoring jurisdiction may:

(A) Consult with the applicant developer and reconsider the provisionally approved application after the applicant revises it; or

(B) Reject the provisionally approved application.

(b) If the department has determined that a provisionally approved application is complete, the approval shall be final.

(c) The sponsoring jurisdiction shall notify each applicant and the department of the final approval or rejection of an application and the amount of the grant award.

(d) The rejection of an application and the amount of a grant award may not be appealed, but a developer may reapply for a grant at any time within the applicable deadlines of the grant program for the same or another eligible housing project.

(6) Upon request by a sponsoring jurisdiction, the department may assist the sponsoring jurisdiction with, or perform on behalf of the sponsoring jurisdiction, any duty required under this section.

SECTION 27. (1) Upon request of the sponsoring jurisdiction under section 26 (3)(b) of this 2024 Act, the assessor of the county in which is located the eligible housing project to which an application being reviewed under section 26 of this 2024 Act relates shall:

(a) Using the last certified assessment roll for the property tax year in which the application is received under section 26 of this 2024 Act:

(A) Determine the amount of property taxes assessed against all tax accounts that include the eligible housing project property; and

(B) Subtract the amount of operating taxes as defined in ORS 310.055 and local option taxes as defined in ORS 310.202 levied by fire districts from the amount determined under subparagraph (A) of this paragraph.

(b) For the first property tax year for which the completed eligible housing project property is estimated to be taken into account:

(A) Determine the estimated amount of property taxes that will be assessed against all tax accounts that include the eligible housing project property; and

(B) Subtract the estimated amount of operating taxes and local option taxes levied by fire districts from the amount determined under subparagraph (A) of this paragraph.

(c) Determine the amount of the increment that results from subtracting the amount determined under subsection (1)(a) of this section from the amount determined under subsection (1)(b) of this section.

(2) As soon as practicable after determining amounts under this section, the county tax officers shall provide written notice to the sponsoring jurisdiction of the amounts.

SECTION 28. (1)(a) The Housing and Community Services Department shall develop a program to make loans to sponsoring jurisdictions to fund grants awarded under the sponsoring jurisdiction's grant program adopted pursuant to section 25 of this 2024 Act.

(b) The loans shall be interest free for the term set by the sponsoring jurisdiction under section 26 (3)(c) of this 2024 Act.

(2) For each application approved under section 26 (5)(b) of this 2024 Act, the Housing and Community Services Department shall:

(a) Enter into a loan agreement with the sponsoring jurisdiction for a payment in an amount equal to the total of:

(A) Loan proceeds in an amount equal to the grant award for the application set under section 26 (3)(d) of this 2024 Act; and

(B) The administrative costs set forth in subsection (3) of this section; and

(b) Pay to the sponsoring jurisdiction the total amount set forth in paragraph (a) of this subsection out of the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

(3) The administrative costs referred to in subsection (2)(a)(B) of this section are:

(a) An amount not greater than five percent of the loan proceeds to reimburse the sponsoring jurisdiction for the costs of administering the grant program, other than the costs of tax administration; and

(b) An amount equal to one percent of the loan proceeds to be transferred to the county in which the sponsoring jurisdiction is situated to reimburse the county for the costs of the tax administration of the grant program by the county tax officers.

(4) The Housing and Community Services Department may assign any and all loan amounts made under this section to the Department of Revenue for collection as provided in ORS 293.250.

(5) The Housing and Community Services Department may:

(a) Consult with the Oregon Business Development Department about any of the powers and duties conferred on the Housing and Community Services Department by sections 24 to 35 of this 2024 Act; and

(b) Adopt any rule it considers necessary or convenient for the administration of sections 24 to 35 of this 2024 Act by the Housing and Community Services Department.

SECTION 29. (1) Upon entering into a loan agreement with the Housing and Community Services Department under section 28 of this 2024 Act, a sponsoring jurisdiction shall offer a grant agreement to each developer whose application was approved under section 26 (5)(b) of this 2024 Act.

(2) The grant agreement shall:

(a) Include a grant award in the amount set under section 26 (3)(d) of this 2024 Act; and

(b) Contain terms that:

(A) Are required under sections 24 to 35 of this 2024 Act or the ordinance or resolution adopted by the sponsoring jurisdiction pursuant to section 25 of this 2024 Act.

(B) Do not conflict with sections 24 to 35 of this 2024 Act or the ordinance or resolution adopted by the sponsoring jurisdiction pursuant to section 25 of this 2024 Act.

(3) Upon entering into a grant agreement with a developer, a sponsoring jurisdiction shall adopt an ordinance or resolution setting forth the details of the eligible housing project that is the subject of the agreement, including but not limited to:

(a) A description of the eligible housing project;

(b) An itemized description of the eligible costs;

- (c) The amount and terms of the grant award;
- (d) Written notice that the eligible housing project property is exempt from property taxation in accordance with section 30 of this 2024 Act; and
- (e) A statement declaring that the grant has been awarded in response to the housing needs of communities within the sponsoring jurisdiction.

(4) Unless otherwise specified in the grant agreement, as soon as practicable after the ordinance or resolution required under subsection (3) of this section becomes effective, the sponsoring jurisdiction shall distribute the loan proceeds received from the department under section 28 (2)(a)(A) of this 2024 Act to the developer as the grant moneys awarded under this section.

(5) The sponsoring jurisdiction shall forward to the tax officers of the county in which the eligible housing project is located a copy of the grant agreement, the ordinance or resolution and any other material the sponsoring jurisdiction considers necessary for the tax officers to perform their duties under sections 24 to 35 of this 2024 Act or the ordinance or resolution.

(6) Upon request, the department may assist the sponsoring jurisdiction with, or perform on behalf of the sponsoring jurisdiction, any duty required under this section.

SECTION 30. (1) Upon receipt of the copy of a grant agreement and ordinance or resolution from the sponsoring jurisdiction under section 29 (5) of this 2024 Act, the assessor of the county in which eligible housing project property is located shall:

- (a) Exempt the eligible housing project property in accordance with this section;
- (b) Assess and tax the nonexempt property in the tax account as other similar property is assessed and taxed; and

(c) Submit a written report to the sponsoring jurisdiction setting forth the assessor's estimate of the amount of:

- (A) The real market value of the exempt eligible housing project property; and
- (B) The property taxes on the exempt eligible housing project property that would have been collected if the property were not exempt.

(2)(a) The exemption shall first apply to the first property tax year that begins after completion of the eligible housing project to which the grant relates.

(b) The eligible housing project property shall be disqualified from the exemption on the earliest of:

(A) July 1 of the property tax year immediately succeeding the date on which the fee payment obligation under section 32 of this 2024 Act that relates to the eligible housing project is repaid in full;

(B) The date on which the annual fee imposed on the fee payer under section 32 of this 2024 Act becomes delinquent;

(C) The date on which foreclosure proceedings are commenced as provided by law for delinquent nonexempt taxes assessed with respect to the tax account that includes the eligible housing project; or

(D) The date on which a condition specified in section 33 (1) of this 2024 Act occurs.

(c) After the eligible housing project property has been disqualified from the exemption under this subsection, the property shall be assessed and taxed as other similar property is assessed and taxed.

(3) For each tax year that the eligible housing project property is exempt from taxation, the assessor shall enter a notation on the assessment roll stating:

- (a) That the property is exempt under this section; and
- (b) The presumptive number of property tax years for which the exemption is granted, which shall be the term of the loan agreement relating to the eligible housing project set under section 26 (3)(c) of this 2024 Act.

SECTION 31. (1) Repayment of loans made under section 28 of this 2024 Act shall begin, in accordance with section 32 of this 2024 Act, after completion of the eligible housing project funded by the grant to which the loan relates.

(2)(a) The sponsoring jurisdiction shall determine the date of completion of an eligible housing project.

(b)(A) If an eligible housing project is completed before July 1 of the assessment year, repayment shall begin with the property tax year that begins on July 1 of the assessment year.

(B) If an eligible housing project is completed on or after July 1 of the assessment year, repayment shall begin with the property tax year that begins on July 1 of the succeeding assessment year.

(c) After determining the date of completion under paragraph (a) of this subsection, the sponsoring jurisdiction shall notify the Housing and Community Services Department and the county tax officers of the determination.

(3) A loan shall remain outstanding until repaid in full.

SECTION 32. (1) The fee payer for eligible housing project property that has been granted exemption under section 30 of this 2024 Act shall pay an annual fee for the term that shall be the presumptive number of years for which the property is granted exemption under section 30 (3)(b) of this 2024 Act.

(2)(a) The amount of the fee for the first property tax year in which repayment of the loan is due under section 31 (1) of this 2024 Act shall equal the total of:

(A) The portion of the increment determined under section 27 (1)(c) of this 2024 Act that is attributable to the eligible housing project property to which the fee relates; and

(B) The administrative costs described in section 28 (3) of this 2024 Act divided by the term of the grant agreement entered into under section 29 of this 2024 Act.

(b) For each subsequent property tax year, the amount of the fee shall be 103 percent of the amount of the fee for the preceding property tax year.

(3)(a) Not later than July 15 of each property tax year during the term of the fee obligation, the sponsoring jurisdiction shall certify to the assessor each fee amount that became due under this section on or after July 16 of the previous property tax year from fee payers with respect to eligible housing projects located in the sponsoring jurisdiction.

(b) The assessor shall place each fee amount on the assessment and tax rolls of the county and notify:

(A) The sponsoring jurisdiction of each fee amount and the aggregate of all fee amounts imposed with respect to eligible housing project property located in the sponsoring jurisdiction.

(B) The Housing and Community Services Department of each fee amount and the aggregate of all fee amounts with respect to all eligible housing project property located in the county.

(4)(a) The assessor shall include on the tax statement of each tax account that includes exempt eligible housing project property the amount of the fee imposed on the fee payer with respect to the eligible housing project property.

(b) The fee shall be collected and enforced in the same manner as ad valorem property taxes, including nonexempt taxes, are collected and enforced.

(5)(a) For each property tax year in which a fee is payable under this section, the treasurer shall:

(A) Estimate the amount of operating taxes as defined in ORS 310.055 and local option taxes as defined in ORS 310.202 levied by fire districts that would have been collected on eligible housing project property if the property were not exempt;

(B) Distribute out of the fee moneys the amounts determined under subparagraph (A) of this paragraph to the respective fire districts when other ad valorem property taxes are distributed under ORS 311.395; and

(C) Transfer the net fee moneys to the Housing and Community Services Department for deposit in the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act in repayment of the loans to which the fees relate.

(b) Nonexempt taxes shall be distributed in the same manner as other ad valorem property taxes are distributed.

(6) Any person with an interest in the eligible housing project property on the date on which any fee amount becomes due shall be jointly and severally liable for payment of the fee amount.

(7) Any loan amounts that have not been repaid when the fee payer has discharged its obligations in full under this section remain the obligation of the sponsoring jurisdiction that obtained the loan from the department under section 28 of this 2024 Act.

(8) Any fee amounts collected in excess of the loan amount shall be distributed in the same manner as other ad valorem property taxes are distributed.

SECTION 33. (1)(a) A developer that received a grant award under section 29 of this 2024 Act shall become liable for immediate payment of any outstanding annual fee payments imposed under section 32 of this 2024 Act for the entire term of the fee if:

(A) The developer has not completed the eligible housing project within three years following the date on which the grant moneys were distributed to the developer;

(B) The eligible housing project changes substantially from the project for which the developer's application was approved such that the project would not have been eligible for the grant; or

(C) The developer has not complied with a requirement specified in the grant agreement.

(b) The sponsoring jurisdiction may, in its sole discretion, extend the date on which the eligible housing project must be completed.

(2) If the sponsoring jurisdiction discovers that a developer willfully made a false statement or misrepresentation or willfully failed to report a material fact to obtain a grant with respect to an eligible housing project, the sponsoring jurisdiction may impose on the developer a penalty not to exceed 20 percent of the amount of the grant so obtained, plus any applicable interest and fees associated with the costs of collection.

(3) Any amounts imposed under subsection (1) or (2) of this section shall be a lien on the eligible housing project property and the nonexempt property in the tax account.

(4) The sponsoring jurisdiction shall provide written notice of any amounts that become due under subsections (1) and (2) of this section to the county tax officers and the Housing and Community Services Department.

(5)(a) Any and all amounts required to be paid under this section shall be considered to be liquidated and delinquent, and the Housing and Community Services Department shall assign such amounts to the Department of Revenue for collection as provided in ORS 293.250.

(b) Amounts collected under this subsection shall be deposited, net of any collection charges, in the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

SECTION 34. (1) Not later than June 30 of each year in which a grant agreement entered into under section 29 of this 2024 Act is in effect, a developer that is party to the agreement shall submit a report to the sponsoring jurisdiction in which the eligible housing project is located that contains:

(a) The status of the construction or conversion of the eligible housing project property, including an estimate of the date of completion;

(b) An itemized description of the uses of the grant moneys; and

(c) Any information the sponsoring jurisdiction considers important for evaluating the eligible housing project and the developer's performance under the terms of the grant agreement.

(2) Not later than August 15 of each year, each sponsoring jurisdiction shall submit to the Housing and Community Services Department a report containing such information re-

lating to eligible housing projects within the sponsoring jurisdiction as the department requires.

(3)(a) Not later than November 15 of each year, the department shall submit, in the manner required under ORS 192.245, a report to the interim committees of the Legislative Assembly related to housing.

(b) The report shall set forth in detail:

(A) The information received from sponsoring jurisdictions under subsection (2) of this section;

(B) The status of the repayment of all outstanding loans made under section 28 of this 2024 Act and of the payment of all fees imposed under section 32 of this 2024 Act and all amounts imposed under section 33 of this 2024 Act; and

(C) The cumulative experience of the program developed and implemented under sections 24 to 35 of this 2024 Act.

(c) The report may include recommendations for legislation.

SECTION 35. (1) The Housing Project Revolving Loan Fund is established in the State Treasury, separate and distinct from the General Fund. Interest earned by the Housing Project Revolving Loan Fund shall be credited to the fund.

(2) Moneys in the fund may be invested as provided by ORS 293.701 to 293.857, and the earnings from the investments shall be credited to the fund.

(3) Moneys in the Housing Project Revolving Loan Fund shall consist of:

(a) Amounts appropriated or otherwise transferred or credited to the fund by the Legislative Assembly;

(b) Net fee moneys transferred under section 32 of this 2024 Act;

(c) Amounts deposited in the fund under section 33 of this 2024 Act;

(d) Interest and other earnings received on moneys in the fund; and

(e) Other moneys or proceeds of property from any public or private source that are transferred, donated or otherwise credited to the fund.

(4) Moneys in the Housing Project Revolving Loan Fund are continuously appropriated to the Housing and Community Services Department for the purpose of paying amounts determined under section 28 of this 2024 Act.

(5) Moneys in the Housing Project Revolving Loan Fund at the end of a biennium shall be retained in the fund and used for the purposes set forth in subsection (4) of this section.

SECTION 36. (1) The Housing and Community Services Department shall have developed and begun operating the loan program that the department is required to develop under section 28 of this 2024 Act, including regional trainings and outreach for jurisdictional partners, no later than June 30, 2025.

(2) In the first two years in which the loan program is operating, the department may not expend an amount in excess of two-thirds of the moneys appropriated to the department for the purpose under section 62 of this 2024 Act.

HOUSING LAND USE ADJUSTMENTS

SECTION 37. Sections 38 to 41 of this 2024 Act are added to and made a part of ORS chapter 197A.

SECTION 38. Mandatory adjustment to housing development standards. (1) As used in sections 38 to 41 of this 2024 Act:

(a) "Adjustment" means a deviation from an existing land use regulation.

(b) "Adjustment" does not include:

(A) A request to allow a use of property not otherwise permissible under applicable zoning requirements;

(B) Deviations from land use regulations or requirements related to accessibility, affordability, fire ingress or egress, safety, local tree codes, hazardous or contaminated site

clean-up, wildlife protection, or statewide land use planning goals relating to natural resources, natural hazards, the Willamette River Greenway, estuarine resources, coastal shorelands, beaches and dunes or ocean resources;

(C) A complete waiver of land use regulations or any changes beyond the explicitly requested and allowed adjustments; or

(D) Deviations to requirements related to the implementation of fire or building codes, federal or state air, water quality or surface, ground or stormwater requirements, or requirements of any federal, state or local law other than a land use regulation.

(2) Except as provided in section 39 of this 2024 Act, a local government shall grant a request for an adjustment in an application to develop housing as provided in this section. An application qualifies for an adjustment under this section only if the following conditions are met:

(a) The application is for a building permit or a quasi-judicial, limited or ministerial land use decision;

(b) The development is on lands zoned to allow for residential uses, including mixed-use residential;

(c) The residential development is for densities not less than those required under section 55 (3)(a)(C) of this 2024 Act;

(d) The development is within an urban growth boundary, not including lands that have not been annexed by a city;

(e) The development is of net new housing units in new construction projects, including:

(A) Single-family or multifamily;

(B) Mixed-use residential where at least 75 percent of the developed floor area will be used for residential uses;

(C) Manufactured dwelling parks;

(D) Accessory dwelling units; or

(E) Middle housing as defined in ORS 197A.420;

(f) The application requests not more than 10 distinct adjustments to development standards as provided in this section. A "distinct adjustment" means:

(A) An adjustment to one of the development standards listed in subsection (4) of this section where each discrete adjustment to a listed development standard that includes multiple component standards must be counted as an individual adjustment; or

(B) An adjustment to one of the development standards listed in subsection (5) of this section where each discrete adjustment to a listed development standard that includes multiple component standards must be counted as an individual adjustment; and

(g) The application states how at least one of the following criteria apply:

(A) The adjustments will enable development of housing that is not otherwise feasible due to cost or delay resulting from the unadjusted land use regulations;

(B) The adjustments will enable development of housing that reduces the sale or rental prices per residential unit;

(C) The adjustments will increase the number of housing units within the application;

(D) All of the units in the application are subject to an affordable housing covenant as described in ORS 456.270 to 456.295, making them affordable to moderate income households as defined in ORS 456.270 for a minimum of 30 years;

(E) At least 20 percent of the units in the application are subject to an affordable housing covenant as described in ORS 456.270 to 456.295, making them affordable to low income households as defined in ORS 456.270 for a minimum of 60 years;

(F) The adjustments will enable the provision of accessibility or visitability features in housing units that are not otherwise feasible due to cost or delay resulting from the unadjusted land use regulations; or

(G) All of the units in the application are subject to a zero equity, limited equity, or shared equity ownership model including resident-owned cooperatives and community land

trusts making them affordable to moderate income households as described in ORS 456.270 to 456.295 for a period of 90 years.

(3) A decision on an application for an adjustment made under this section is a limited land use decision. Only the applicant may appeal the decision. No notice of the decision is required if the application is denied, other than notice to the applicant. In implementing this subsection, a local government may:

(a) Use an existing process, or develop and apply a new process, that complies with the requirements of this subsection; or

(b) Directly apply the process set forth in this subsection.

(4) A local government shall grant an adjustment to the following development standards:

(a) Side or rear setbacks, for an adjustment of not more than 10 percent.

(b) For an individual development project, the common area, open space or area that must be landscaped on the same lot or parcel as the proposed housing, for a reduction of not more than 25 percent.

(c) Parking minimums.

(d) Minimum lot sizes, not more than a 10 percent adjustment, and including not more than a 10 percent adjustment to lot widths or depths.

(e) Maximum lot sizes, not more than a 10 percent adjustment, including not more than a 10 percent adjustment to lot width or depths and only if the adjustment results in:

(A) More dwelling units than would be allowed without the adjustment; and

(B) No reduction in density below the minimum applicable density.

(f) Building lot coverage requirements for up to a 10 percent adjustment.

(g) For manufactured dwelling parks, middle housing as defined in ORS 197A.420, multi-family housing and mixed-use residential housing:

(A) Requirements for bicycle parking that establish:

(i) The minimum number of spaces for use by the residents of the project, provided the application includes at least one-half space per residential unit; or

(ii) The location of the spaces, provided that lockable, covered bicycle parking spaces are within or adjacent to the residential development;

(B) For uses other than cottage clusters, as defined in ORS 197A.420 (1)(c)(D), building height maximums that:

(i) Are in addition to existing applicable height bonuses, if any; and

(ii) Are not more than an increase of the greater of:

(I) One story; or

(II) A 20 percent increase to base zone height with rounding consistent with methodology outlined in city code, if any;

(C) Unit density maximums, not more than an amount necessary to account for other adjustments under this section; and

(D) Prohibitions, for the ground floor of a mixed-use building, against:

(i) Residential uses except for one face of the building that faces the street and is within 20 feet of the street; and

(ii) Nonresidential active uses that support the residential uses of the building, including lobbies, day care, passenger loading, community rooms, exercise facilities, offices, activity spaces or live-work spaces, except for active uses in specifically and clearly defined mixed use areas or commercial corridors designated by local governments.

(5) A local government shall grant an adjustment to design standards that regulate:

(a) Facade materials, color or pattern.

(b) Facade articulation.

(c) Roof forms and materials.

(d) Entry and garage door materials.

(e) Garage door orientation, unless the building is adjacent to or across from a school or public park.

- (f) Window materials, except for bird-safe glazing requirements.
- (g) Total window area, for up to a 30 percent adjustment, provided the application includes at least 12 percent of the total facade as window area.
- (h) For manufactured dwelling parks, middle housing as defined in ORS 197A.420, multi-family housing and mixed-use residential:
 - (A) Building orientation requirements, not including transit street orientation requirements.
 - (B) Building height transition requirements, not more than a 50 percent adjustment from the base zone.
 - (C) Requirements for balconies and porches.
 - (D) Requirements for recesses and offsets.

SECTION 39. Mandatory adjustments exemption process. (1) A local government may apply to the Housing Accountability and Production Office for an exemption to section 38 of this 2024 Act only as provided in this section. After the application is made, section 38 of this 2024 Act does not apply to the applicant until the office denies the application or revokes the exemption.

(2) To qualify for an exemption under this section, the local government must demonstrate that:

- (a) The local government reviews requested design and development adjustments for all applications for the development of housing that are under the jurisdiction of that local government;
- (b) All listed development and design adjustments under section 38 (4) and (5) of this 2024 Act are eligible for an adjustment under the local government's process; and
- (c)(A) Within the previous 5 years the city has approved 90 percent of received adjustment requests; or

(B) The adjustment process is flexible and accommodates project needs as demonstrated by testimonials of housing developers who have utilized the adjustment process within the previous five years.

(3) Upon receipt of an application under this section, the office shall allow for public comment on the application for a period of no less than 45 days. The office shall enter a final order on the adjustment exemption within 120 days of receiving the application. The approval of an application may not be appealed.

(4) In approving an exemption, the office may establish conditions of approval requiring that the city demonstrate that it continues to meet the criteria under subsection (2) of this section.

(5) Local governments with an approved or pending exemption under this section shall clearly and consistently notify applicants, including prospective applicants seeking to request an adjustment, that are engaged in housing development:

- (a) That the local government is employing a local process in lieu of section 38 of this 2024 Act;
- (b) Of the development and design standards for which an applicant may request an adjustment in a housing development application; and
- (c) Of the applicable criteria for the adjustment application.

(6) In response to a complaint and following an investigation, the office may issue an order revoking an exemption issued under this section if the office determines that the local government is:

- (a) Not approving adjustments as required by the local process or the terms of the exemption;
- (b) Engaging in a pattern or practice of violating housing-related statutes or implementing policies that create unreasonable cost or delays to housing production under ORS 197.320 (13)(a); or

(c) Failing to comply with conditions of approval adopted under subsection (4) of this section.

SECTION 40. Temporary exemption authority. Before January 1, 2025, notwithstanding section 39 of this 2024 Act:

(1) Cities may deliver applications for exemption under section 39 of this 2024 Act to the Department of Land Conservation and Development; and

(2) The Department of Land Conservation and Development may perform any action that the Housing Accountability and Production Office may take under section 39 of this 2024 Act. Decisions and actions of the department under this section are binding on the office.

SECTION 41. Reporting. (1) A city required to provide a report under ORS 197A.110 shall include as part of that report information reasonably requested from the Department of Land Conservation and Development on residential development produced through approvals of adjustments granted under section 38 of this 2024 Act. The department may not develop a separate process for collecting this data or otherwise place an undue burden on local governments.

(2) On or before September 15 of each even-numbered year, the department shall provide a report to an interim committee of the Legislative Assembly related to housing in the manner provided in ORS 192.245 on the data collected under subsection (1) of this section. The committee shall invite the League of Oregon Cities to provide feedback on the report and the efficacy of section 38 of this 2024 Act.

SECTION 42. Operative date. Sections 38 to 41 of this 2024 Act become operative on January 1, 2025.

SECTION 43. Sunset. Sections 38 to 41 of this 2024 Act are repealed on January 2, 2032.

LIMITED LAND USE DECISIONS

SECTION 44. ORS 197.015 is amended to read:

197.015. As used in ORS chapters 195, 196, 197 and 197A, unless the context requires otherwise:

(1) "Acknowledgment" means a commission order that certifies that a comprehensive plan and land use regulations, land use regulation or plan or regulation amendment complies with the goals or certifies that Metro land use planning goals and objectives, Metro regional framework plan, amendments to Metro planning goals and objectives or amendments to the Metro regional framework plan comply with the goals.

(2) "Board" means the Land Use Board of Appeals.

(3) "Carport" means a stationary structure consisting of a roof with its supports and not more than one wall, or storage cabinet substituting for a wall, and used for sheltering a motor vehicle.

(4) "Commission" means the Land Conservation and Development Commission.

(5) "Comprehensive plan" means a generalized, coordinated land use map and policy statement of the governing body of a local government that interrelates all functional and natural systems and activities relating to the use of lands, including but not limited to sewer and water systems, transportation systems, educational facilities, recreational facilities, and natural resources and air and water quality management programs. "Comprehensive" means all-inclusive, both in terms of the geographic area covered and functional and natural activities and systems occurring in the area covered by the plan. "General nature" means a summary of policies and proposals in broad categories and does not necessarily indicate specific locations of any area, activity or use. A plan is "coordinated" when the needs of all levels of governments, semipublic and private agencies and the citizens of Oregon have been considered and accommodated as much as possible. "Land" includes water, both surface and subsurface, and the air.

(6) "Department" means the Department of Land Conservation and Development.

(7) "Director" means the Director of the Department of Land Conservation and Development.

(8) "Goals" means the mandatory statewide land use planning standards adopted by the commission pursuant to ORS chapters 195, 196, 197 and 197A.

(9) "Guidelines" means suggested approaches designed to aid cities and counties in preparation, adoption and implementation of comprehensive plans in compliance with goals and to aid state agencies and special districts in the preparation, adoption and implementation of plans, programs and regulations in compliance with goals. Guidelines are advisory and do not limit state agencies, cities, counties and special districts to a single approach.

(10) "Land use decision":

(a) Includes:

(A) A final decision or determination made by a local government or special district that concerns the adoption, amendment or application of:

(i) The goals;

(ii) A comprehensive plan provision;

(iii) A land use regulation; or

(iv) A new land use regulation;

(B) A final decision or determination of a state agency other than the commission with respect to which the agency is required to apply the goals; or

(C) A decision of a county planning commission made under ORS 433.763;

(b) Does not include a decision of a local government:

(A) That is made under land use standards that do not require interpretation or the exercise of policy or legal judgment;

(B) That approves or denies a building permit issued under clear and objective land use standards;

(C) That is a limited land use decision;

(D) That determines final engineering design, construction, operation, maintenance, repair or preservation of a transportation facility that is otherwise authorized by and consistent with the comprehensive plan and land use regulations;

(E) That is an expedited land division as described in ORS 197.360;

(F) That approves, pursuant to ORS 480.450 (7), the siting, installation, maintenance or removal of a liquefied petroleum gas container or receptacle regulated exclusively by the State Fire Marshal under ORS 480.410 to 480.460;

(G) That approves or denies approval of a final subdivision or partition plat or that determines whether a final subdivision or partition plat substantially conforms to the tentative subdivision or partition plan; or

(H) That a proposed state agency action subject to ORS 197.180 (1) is compatible with the acknowledged comprehensive plan and land use regulations implementing the plan, if:

(i) The local government has already made a land use decision authorizing a use or activity that encompasses the proposed state agency action;

(ii) The use or activity that would be authorized, funded or undertaken by the proposed state agency action is allowed without review under the acknowledged comprehensive plan and land use regulations implementing the plan; or

(iii) The use or activity that would be authorized, funded or undertaken by the proposed state agency action requires a future land use review under the acknowledged comprehensive plan and land use regulations implementing the plan;

(c) Does not include a decision by a school district to close a school;

(d) Does not include, except as provided in ORS 215.213 (13)(c) or 215.283 (6)(c), authorization of an outdoor mass gathering as defined in ORS 433.735, or other gathering of fewer than 3,000 persons that is not anticipated to continue for more than 120 hours in any three-month period; and

(e) Does not include:

(A) A writ of mandamus issued by a circuit court in accordance with ORS 215.429 or 227.179;

(B) Any local decision or action taken on an application subject to ORS 215.427 or 227.178 after a petition for a writ of mandamus has been filed under ORS 215.429 or 227.179; or

(C) A state agency action subject to ORS 197.180 (1), if:

(i) The local government with land use jurisdiction over a use or activity that would be authorized, funded or undertaken by the state agency as a result of the state agency action has already made a land use decision approving the use or activity; or

(ii) A use or activity that would be authorized, funded or undertaken by the state agency as a result of the state agency action is allowed without review under the acknowledged comprehensive plan and land use regulations implementing the plan.

(11) "Land use regulation" means any local government zoning ordinance, land division ordinance adopted under ORS 92.044 or 92.046 or similar general ordinance establishing standards for implementing a comprehensive plan.

(12)(a) "Limited land use decision"[:]

[(a)] means a final decision or determination made by a local government pertaining to a site within an urban growth boundary that concerns:

(A) The approval or denial of a tentative subdivision or partition plan, as described in ORS 92.040 (1).

(B) The approval or denial of an application based on discretionary standards designed to regulate the physical characteristics of a use permitted outright, including but not limited to site review and design review.

(C) The approval or denial of an application for a replat.

(D) The approval or denial of an application for a property line adjustment.

(E) The approval or denial of an application for an extension, alteration or expansion of a nonconforming use.

(b) "**Limited land use decision**" does not mean a final decision made by a local government pertaining to a site within an urban growth boundary that concerns approval or denial of a final subdivision or partition plat or that determines whether a final subdivision or partition plat substantially conforms to the tentative subdivision or partition plan.

(13) "Local government" means any city, county or Metro or an association of local governments performing land use planning functions under ORS 195.025.

(14) "Metro" means a metropolitan service district organized under ORS chapter 268.

(15) "Metro planning goals and objectives" means the land use goals and objectives that Metro may adopt under ORS 268.380 (1)(a). The goals and objectives do not constitute a comprehensive plan.

(16) "Metro regional framework plan" means the regional framework plan required by the 1992 Metro Charter or its separate components. Neither the regional framework plan nor its individual components constitute a comprehensive plan.

(17) "New land use regulation" means a land use regulation other than an amendment to an acknowledged land use regulation adopted by a local government that already has a comprehensive plan and land regulations acknowledged under ORS 197.251.

(18) "Person" means any individual, partnership, corporation, association, governmental subdivision or agency or public or private organization of any kind. The Land Conservation and Development Commission or its designee is considered a person for purposes of appeal under ORS chapters 195, 197 and 197A.

(19) "Special district" means any unit of local government, other than a city, county, Metro or an association of local governments performing land use planning functions under ORS 195.025, authorized and regulated by statute and includes but is not limited to water control districts, domestic water associations and water cooperatives, irrigation districts, port districts, regional air quality control authorities, fire districts, school districts, hospital districts, mass transit districts and sanitary districts.

(20) "Urban growth boundary" means an acknowledged urban growth boundary contained in a city or county comprehensive plan or adopted by Metro under ORS 268.390 (3).

(21) "Urban unincorporated community" means an area designated in a county's acknowledged comprehensive plan as an urban unincorporated community after December 5, 1994.

(22) "Voluntary association of local governments" means a regional planning agency in this state officially designated by the Governor pursuant to the federal Office of Management and Budget Circular A-95 as a regional clearinghouse.

(23) "Wetlands" means those areas that are inundated or saturated by surface or ground water at a frequency and duration that are sufficient to support, and that under normal circumstances do support, a prevalence of vegetation typically adapted for life in saturated soil conditions.

SECTION 45. ORS 197.195 is amended to read:

197.195. (1) A limited land use decision shall be consistent with applicable provisions of city or county comprehensive plans and land use regulations. Such a decision may include conditions authorized by law. Within two years of September 29, 1991, cities and counties shall incorporate all comprehensive plan standards applicable to limited land use decisions into their land use regulations. A decision to incorporate all, some, or none of the applicable comprehensive plan standards into land use regulations shall be undertaken as a post-acknowledgment amendment under ORS 197.610 to 197.625. If a city or county does not incorporate its comprehensive plan provisions into its land use regulations, the comprehensive plan provisions may not be used as a basis for a decision by the city or county or on appeal from that decision.

(2) A limited land use decision is not subject to the requirements of ORS 197.797.

(3) A limited land use decision is subject to the requirements of paragraphs (a) to (c) of this subsection.

(a) In making a limited land use decision, the local government shall follow the applicable procedures contained within its acknowledged comprehensive plan and land use regulations and other applicable legal requirements.

(b) For limited land use decisions, the local government shall provide written notice to owners of property within 100 feet of the entire contiguous site for which the application is made. The list shall be compiled from the most recent property tax assessment roll. For purposes of review, this requirement shall be deemed met when the local government can provide an affidavit or other certification that such notice was given. Notice shall also be provided to any neighborhood or community organization recognized by the governing body and whose boundaries include the site.

(c) The notice and procedures used by local government shall:

(A) Provide a 14-day period for submission of written comments prior to the decision;

(B) State that issues which may provide the basis for an appeal to the Land Use Board of Appeals shall be raised in writing prior to the expiration of the comment period. Issues shall be raised with sufficient specificity to enable the decision maker to respond to the issue;

(C) List, by commonly used citation, the applicable criteria for the decision;

(D) Set forth the street address or other easily understood geographical reference to the subject property;

(E) State the place, date and time that comments are due;

(F) State that copies of all evidence relied upon by the applicant are available for review, and that copies can be obtained at cost;

(G) Include the name and phone number of a local government contact person;

(H) Provide notice of the decision to the applicant and any person who submits comments under subparagraph (A) of this paragraph. The notice of decision must include an explanation of appeal rights; and

(I) Briefly summarize the local decision making process for the limited land use decision being made.

(4) Approval or denial of a limited land use decision shall be based upon and accompanied by a brief statement that explains the criteria and standards considered relevant to the decision, states the facts relied upon in rendering the decision and explains the justification for the decision based on the criteria, standards and facts set forth.

(5) A local government may provide for a hearing before the local government on appeal of a limited land use decision under this section. The hearing may be limited to the record developed pursuant to the initial hearing under subsection (3) of this section or may allow for the introduction

of additional testimony or evidence. A hearing on appeal that allows the introduction of additional testimony or evidence shall comply with the requirements of ORS 197.797. Written notice of the decision rendered on appeal shall be given to all parties who appeared, either orally or in writing, before the hearing. The notice of decision shall include an explanation of the rights of each party to appeal the decision.

(6) A city shall apply the procedures in this section, and only the procedures in this section, to a limited land use decision, even if the city has not incorporated limited land use decisions into land use regulations, as required by ORS 197.646 (3), except that a limited land use decision that is made under land use standards that do not require interpretation or the exercise of policy or legal judgment may be made by city staff using a ministerial process.

SECTION 45a. Section 46 of this 2024 Act is added to and made a part of ORS chapter 197.

SECTION 46. Applicability of limited land use decision to housing development. (1) The Housing Accountability and Production Office may approve a hardship exemption or time extension to ORS 197.195 (6), during which time ORS 197.195 (6) does not apply to decisions by a local government.

(2) The office may grant an exemption or time extension only if the local government demonstrates that a substantial hardship would result from the increased costs or staff capacity needed to implement procedures as required under ORS 197.195 (6).

(3) The office shall review exemption or time extension requests under the deadlines provided in section 39 (3) of this 2024 Act.

SECTION 47. Sunset. Section 46 of this 2024 Act is repealed on January 2, 2032.

SECTION 47a. Operative date. Section 46 of this 2024 Act and the amendments to ORS 197.015 and 197.195 by sections 44 and 45 of this 2024 Act become operative on January 1, 2025.

ONE-TIME SITE ADDITIONS TO URBAN GROWTH BOUNDARIES

SECTION 48. Sections 49 to 59 of this 2024 Act are added to and made a part of ORS chapter 197A.

SECTION 49. Definitions. As used in sections 49 to 59 of this 2024 Act:

(1) “Net residential acre” means an acre of residentially designated buildable land, not including rights of way for streets, roads or utilities or areas not designated for development due to natural resource protections or environmental constraints.

(2) “Site” means a lot or parcel or contiguous lots or parcels, or both, with or without common ownership.

SECTION 50. City addition of sites outside of Metro. (1) Notwithstanding any other provision of ORS chapter 197A, a city outside of Metro may add a site to the city’s urban growth boundary under sections 49 to 59 of this 2024 Act, if:

(a) The site is adjacent to the existing urban growth boundary of the city or is separated from the existing urban growth boundary by only a street or road;

(b) The site is:

(A) Designated as an urban reserve under ORS 197A.230 to 197A.250, including a site whose designation is adopted under ORS 197.652 to 197.658;

(B) Designated as nonresource land; or

(C) Subject to an acknowledged exception to a statewide land use planning goal relating to farmland or forestland;

(c) The city has not previously adopted an urban growth boundary amendment or exchange under sections 49 to 59 of this 2024 Act;

(d) The city has demonstrated a need for the addition under section 52 of this 2024 Act;

(e) The city has requested and received an application as required under sections 53 and 54 of this 2024 Act;

(f) The total acreage of the site:

(A) For a city with a population of 25,000 or greater, does not exceed 100 net residential acres; or

(B) For a city with a population of less than 25,000, does not exceed 50 net residential acres; and

(g)(A) The city has adopted a binding conceptual plan for the site that satisfies the requirements of section 55 of this 2024 Act; or

(B) The added site does not exceed 15 net residential acres and satisfies the requirements of section 56 of this 2024 Act.

(2) A county shall approve an amendment to an urban growth boundary made under this section that complies with sections 49 to 59 of this 2024 Act and shall cooperate with a city to facilitate the coordination of functions under ORS 195.020 to facilitate the city's annexation and the development of the site. The county's decision is not a land use decision.

(3) Notwithstanding ORS 197.626, an action by a local government under sections 49 to 59 of this 2024 Act is not a land use decision as defined in ORS 197.015.

SECTION 51. Petition for additions of sites to Metro urban growth boundary. (1) A city within Metro may petition Metro to add a site within the Metro urban growth boundary if the site:

(a) Satisfies the requirements of section 50 (1) of this 2024 Act; and

(b) Is designated as an urban reserve.

(2)(a) Within 120 days of receiving a petition under this section, Metro shall determine whether the site would substantially comply with the applicable provisions of sections 49 to 59 of this 2024 Act.

(b) If Metro determines that a petition does not substantially comply, Metro shall:

(A) Notify the city of deficiencies in the petition, specifying sufficient detail to allow the city to remedy any deficiency in a subsequent resubmittal; and

(B) Allow the city to amend its conceptual plan and resubmit it as a petition to Metro under this section.

(c) If Metro determines that a petition does comply, notwithstanding any other provision of ORS chapter 197A, Metro shall adopt amendments to its urban growth boundary to include the site in the petition, unless the amendment would result in more than 300 total net residential acres added under this subsection.

(3) If the net residential acres included in petitions that Metro determines are in compliance on or before July 1, 2025, total less than 300 net residential acres, Metro shall adopt amendments to its urban growth boundary under subsection (2)(c) of this section:

(a) On or before November 1, 2025, for all petitions deemed compliant on or before July 1, 2025; or

(b) Within 120 days after a petition is deemed compliant after July 1, 2025, in the order in which the petitions are received.

(4) If the net residential acres included in petitions that Metro determines are in compliance on or before July 1, 2025, total 300 or more net residential acres, on or before January 1, 2027, Metro shall adopt amendments to its urban growth boundary under subsection (2)(c) of this section to include the sites in those petitions that Metro determines will:

(a) Best comply with the provisions of section 55 of this 2024 Act; and

(b) Maximize the development of needed housing.

(5) Metro may not conduct a hearing to review or select petitions or adopt amendments to its urban growth boundary under this section.

SECTION 52. City demonstration of need. A city may not add, or petition to add, a site under sections 49 to 59 of this 2024 Act, unless:

(1) The city has demonstrated a need for additional land based on the following factors:

(a)(A) In the previous 20 years there have been no urban growth boundary expansions for residential use adopted by a city or by Metro in a location adjacent to the city; and

(B) The city does not have within the existing urban growth boundary an undeveloped, contiguous tract that is zoned for residential use that is larger than 20 net residential acres; or

(b) Within urban growth boundary expansion areas for residential use adopted by the city over the previous 20 years, or by Metro in locations adjacent to the city, 75 percent of the lands either:

(A) Are developed; or

(B) Have an acknowledged comprehensive plan with land use designations in preparation for annexation and have a public facilities plan and associated financing plan.

(2) The city has demonstrated a need for affordable housing, based on:

(a) Having a greater percentage of severely cost-burdened households than the average for this state based on the Comprehensive Housing Affordability Strategy data from the United States Department of Housing and Urban Development; or

(b) At least 25 percent of the renter households in the city being severely rent burdened as indicated under the most recent housing equity indicator data under ORS 456.602 (2)(g).

SECTION 53. City solicitation of site applications. (1) Before a city may select a site for inclusion within the city's or Metro's urban growth boundary under sections 49 to 59 of this 2024 Act, a city must provide public notice that includes:

(a) The city's intention to select a site for inclusion within the city's urban growth boundary.

(b) Each basis under which the city has determined that it qualifies to include a site under section 52 of this section.

(c) A deadline for submission of applications under this section that is at least 45 days following the date of the notice.

(d) A description of the information, form and format required of an application, including the requirements of section 55 (2) of this 2024 Act.

(2) A copy of the notice of intent under this section must be provided to:

(a) Each county in which the city resides;

(b) Each special district providing urban services within the city's urban growth boundary;

(c) The Department of Land Conservation and Development; and

(d) Metro, if the city is within Metro.

SECTION 54. City review of site applications. (1) After the deadline for submission of applications established under section 55 of this 2024 Act, the city shall:

(a) Review applications filed for compliance with sections 49 to 59 of this 2024 Act.

(b) For each completed application that complies with sections 49 to 59 of this 2024 Act, provide notice to the residents of the proposed site area who were not signatories to the application.

(c) Provide opportunities for public participation in selecting a site, including, at least:

(A) One public comment period;

(B)(i) One meeting of the city's planning commission at which public testimony is considered;

(ii) One meeting of the city's council at which public testimony is considered; or

(iii) One public open house; and

(C) Notice on the city's website or published in a paper of record at least 14 days before:

(i) A meeting under subparagraph (B) of this paragraph; and

(ii) The beginning of a comment period under subparagraph (A) of this paragraph.

(d) Consult with, request necessary information from and provide the opportunity for written comment from:

(A) The owners of each lot or parcel within the site;

(B) If the city does not currently exercise land use jurisdiction over the entire site, the governing body of each county with land use jurisdiction over the site;

- (C) Any special district that provides urban services to the site; and
- (D) Any public or private utility that provides utilities to the site.
- (2) An application filed under this section must:
 - (a) Be completed for each property owner or group of property owners that are proposing an urban growth boundary amendment under sections 49 to 59 of this 2024 Act;
 - (b) Be in writing in a form and format as required by the city;
 - (c) Specify the lots or parcels that are the subject of the application;
 - (d) Be signed by all owners of lots or parcels included within the application; and
 - (e) Include each owner's signed consent to annexation of the properties if the site is added to the urban growth boundary.
- (3) If the city has received approval from all property owners of such lands, in writing in a form and format specified by the city, the governing body of the city may select an application and the city shall adopt a conceptual plan as described in section 55 of this 2024 Act for all or a portion of the lands contained within the application.
- (4) A conceptual plan adopted under subsection (3) of this section must include findings identifying reasons for inclusion of lands within the conceptual plan and reasons why lands, if any, submitted as part of an application that was partially approved were not included within the conceptual plan.

SECTION 55. Conceptual plan for added sites. (1) As used in this section:

- (a) "Affordable units" means residential units described in subsection (3)(f)(A) or (4) of this section.
- (b) "Market rate units" means residential units other than affordable units.
- (2) Before adopting an urban growth boundary amendment under section 50 of this 2024 Act or petitioning Metro under section 51 of this 2024 Act, for a site larger than 15 net residential acres, a city shall adopt a binding conceptual plan as an amendment to its comprehensive plan.
- (3) The conceptual plan must:
 - (a) Establish the total net residential acres within the site and must require for those residential areas:
 - (A) A diversity of housing types and sizes, including middle housing, accessible housing and other needed housing;
 - (B) That the development will be on lands zoned for residential or mixed-use residential uses; and
 - (C) The development will be built at net residential densities not less than:
 - (i) Seventeen dwelling units per net residential acre if sited within the Metro urban growth boundary;
 - (ii) Ten units per net residential acre if sited in a city with a population of 30,000 or greater;
 - (iii) Six units per net residential acre if sited in a city with a population of 2,500 or greater and less than 30,000; or
 - (iv) Five units per net residential acre if sited in a city with a population less than 2,500;
 - (b) Designate within the site:
 - (A) Recreation and open space lands; and
 - (B) Lands for commercial uses, either separate or as a mixed use, that:
 - (i) Primarily serve the immediate surrounding housing;
 - (ii) Provide goods and services at a smaller scale than provided on typical lands zoned for commercial use; and
 - (iii) Are provided at the minimum amount necessary to support and integrate viable commercial and residential uses;
- (c) If the city has a population of 5,000 or greater, include a transportation network for the site that provides diverse transportation options, including walking, bicycling and transit use if public transit services are available, as well as sufficient connectivity to existing and

planned transportation network facilities as shown in the local government's transportation system plan as defined in Land Conservation and Development Commission rules;

(d) Demonstrate that protective measures will be applied to the site consistent with the statewide land use planning goals for:

- (A) Open spaces, scenic and historic areas or natural resources;
- (B) Air, water and land resources quality;
- (C) Areas subject to natural hazards;
- (D) The Willamette River Greenway;
- (E) Estuarine resources;
- (F) Coast shorelands; or
- (G) Beaches and dunes;

(e) Include a binding agreement among the city, each owner within the site and any other necessary public or private utility provider, local government or district, as defined in ORS 195.060, or combination of local governments and districts that the site will be served with all necessary urban services as defined in ORS 195.065, or an equivalent assurance; and

(f) Include requirements that ensure that:

(A) At least 30 percent of the residential units are subject to affordability restrictions, including but not limited to affordable housing covenants, as described in ORS 456.270 to 456.295, that require for a period of not less than 60 years that the units be:

(i) Available for rent, with or without government assistance, by households with an income of 80 percent or less of the area median income as defined in ORS 456.270; or

(ii) Available for purchase, with or without government assistance, by households with an income of 130 percent or less of the area median income;

(B) The construction of all affordable units has commenced before the city issues certificates of occupancy to the last 15 percent of market rate units;

(C) All common areas and amenities are equally available to residents of affordable units and of market rate units and properties designated for affordable units are dispersed throughout the site; and

(D) The requirement for affordable housing units is recorded before the building permits are issued for any property within the site, and the requirements contain financial penalties for noncompliance.

(4) A city may require greater affordability requirements for residential units than are required under subsection (3)(f)(A) of this section, provided that the city significantly and proportionally offsets development costs related to:

- (a) Permits or fees;
- (b) System development charges;
- (c) Property taxes; or
- (d) Land acquisition and predevelopment costs.

SECTION 56. Alternative for small additions. (1) A city that intends to add 15 net residential acres or less is not required to adopt a conceptual plan under section 55 of this 2024 Act if the city has entered into:

(a) Enforceable and recordable agreements with each landowner of a property within the site to ensure that the site will comply with the affordability requirements described in section 55 (3)(f) of this 2024 Act; and

(b) A binding agreement with each owner within the site and any other necessary public or private utility provider, local government or district, as defined in ORS 195.060, or combination of local governments and districts to ensure that the site will be served with all necessary urban services as defined in ORS 195.065.

(2) This section does not apply to a city within Metro.

SECTION 57. Department approval of site additions. (1) Within 21 days after the adoption of an amendment to an urban growth boundary or the adoption or amendment of a conceptual plan under sections 49 to 59 of this 2024 Act, and the approval by a county if required

under section 50 (2) of this 2024 Act, the conceptual plan or amendment must be submitted to the Department of Land Conservation and Development for review. The submission must be made by:

(a) The city, for an amendment under section 50 or 58 of this 2024 Act; or

(b) Metro, for an amendment under section 51 or 58 of this 2024 Act.

(2) Within 60 days after receiving a submittal under subsection (1) of this section, the department shall:

(a) Review the submittal for compliance with the provisions of sections 49 to 59 of this 2024 Act.

(b)(A) If the submittal substantially complies with the provisions of sections 49 to 59 of this 2024 Act, issue an order approving the submittal; or

(B) If the submittal does not substantially comply with the provisions of sections 49 to 59 of this 2024 Act, issue an order remanding the submittal to the city or to Metro with a specific determination of deficiencies in the submittal and with sufficient detail to identify a specific remedy for any deficiency in a subsequent resubmittal.

(3) If a conceptual plan is remanded to Metro under subsection (2)(b) of this section:

(a) The department shall notify the city; and

(b) The city may amend its conceptual plan and resubmit a petition to Metro under section 51 of this 2024 Act.

(4) Judicial review of the department's order:

(a) Must be as a review of orders other than a contested case under ORS 183.484; and

(b) May be initiated only by the city or an owner of a proposed site.

(5) Following the approval of a submittal under this section, a local government must include the added lands in any future inventory of buildable lands or determination of housing capacity under ORS 197A.270, 197A.280, 197A.335 or 197A.350.

SECTION 58. Alternative urban growth boundary land exchange. (1) In lieu of amending its urban growth boundary under any other process provided by sections 49 to 59 of this 2024 Act, Metro or a city outside of Metro may amend its urban growth boundary to add one or more sites described in section 51 (1)(a) and (b) of this 2024 Act to the urban growth boundary and to remove one or more tracts of land from the urban growth boundary as provided in this section.

(2) The acreage of the added site and removed lands must be roughly equivalent.

(3) The removed lands must have been zoned for residential uses.

(4) The added site must be zoned for residential uses at the same or greater density than the removed lands.

(5)(a) Except as provided in paragraph (b) of this subsection, land may be removed from an urban growth boundary under this section without landowner consent.

(b) A landowner may not appeal the removal of the landowner's land from an urban growth boundary under this section unless the landowner agrees to enter into a recorded agreement with Metro or the city in which the landowner would consent to annexation and development of the land within 20 years if the land remains in the urban growth boundary.

(6) Review of an exchange of lands made under this section may only be made by:

(a) For cities outside of Metro, the county as provided in section 50 (2) of this 2024 Act and by the Department of Land Conservation and Development, subject to judicial review, as provided in section 57 of this 2024 Act; or

(b) For Metro, the Department of Land Conservation and Development, subject to judicial review, as provided in section 57 of this 2024 Act.

(7) Sections 50 (1)(d) to (g), 52, 53, 54, 55 and 56 of this 2024 Act do not apply to a site addition made under this section.

SECTION 59. Reporting on added sites. A city for which an amendment was made to an urban growth boundary and approved under sections 49 to 59 of this 2024 Act shall submit a

report describing the status of development within the included area to the Department of Land Conservation and Development every two years until:

- (1) January 2, 2033; or
- (2) The city determines that development consistent with the acknowledged conceptual plan is deemed complete.

SECTION 60. Sunset. Sections 49 to 59 of this 2024 Act are repealed on January 2, 2033.

APPROPRIATIONS

SECTION 61. Appropriation and expenditure limitation to Department of Land Conservation and Development. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Department of Land Conservation and Development, for the biennium ending June 30, 2025, out of the General Fund, the amount of \$5,629,017, for deposit into the Housing Accountability and Production Office Fund, established under section 4 of this 2024 Act, to take any action to implement sections 1 to 5, 16, 38 to 41, 46 and 49 to 59 of this 2024 Act and the amendments to ORS 183.471, 197.015, 197.195, 197.335, 215.427 and 227.178 by sections 8, 9, 44, 45, 64 and 65 of this 2024 Act.

(2) In addition to and not in lieu of any other appropriation, there is appropriated to the Department of Land Conservation and Development, for the biennium ending June 30, 2025, out of the General Fund, the amount of \$5,000,000, for deposit into the Housing Accountability and Production Office Fund, established under section 4 of this 2024 Act, for the Housing Accountability and Production Office, established under section 1 of this 2024 Act, to provide technical assistance, including grants, under section 1 (2) of this 2024 Act and to provide required studies under section 5 of this 2024 Act.

(3) Notwithstanding any other law limiting expenditures, the amount of \$10,629,017 is established for the biennium ending June 30, 2025, as the maximum amount for payment of expenses by the Department of Land Conservation and Development from the Housing Accountability and Production Office Fund established under section 4 of this 2024 Act.

SECTION 62. Appropriation and expenditure limitation to Housing and Community Services Department. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Housing and Community Services Department, for the biennium ending June 30, 2025, out of the General Fund, the amount of \$75,000,000, for deposit into the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

(2) Notwithstanding any other provision of law, the General Fund appropriation made to the Housing and Community Services Department by section 1, chapter 390, Oregon Laws 2023, for the biennium ending June 30, 2025, is increased by \$878,071 for administrative expenses related to the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

(3) Notwithstanding any other law limiting expenditures, the amount of \$24,750,000 is established for the biennium ending June 30, 2025, as the maximum amount for payment of expenses by the Housing and Community Services Department from the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

SECTION 63. Appropriation and expenditure limitation to Oregon Business Development Department. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Oregon Business Development Department, for the biennium ending June 30, 2025, out of the General Fund, the amount of \$3,000,000, for deposit into the Housing Infrastructure Support Fund established under section 14 of this 2024 Act.

(2) Notwithstanding any other law limiting expenditures, the amount of \$3,000,000 is established for the biennium ending June 30, 2025, as the maximum amount for payment of expenses by the Oregon Business Development Department from the Housing Infrastructure Support Fund established under section 14 of this 2024 Act.

SECTION 63a. Expenditure limitation to Department of Consumer and Business Services. Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 1 (6), chapter 354, Oregon Laws 2023, for the biennium ending June 30, 2025, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Department of Consumer and Business Services, for Building Codes Division, is increased by \$296,944, to support operations of the Housing Accountability and Production Office established under section 1 of this 2024 Act.

CONFORMING AMENDMENTS

SECTION 64. ORS 197.335, as amended by section 17, chapter 13, Oregon Laws 2023, is amended to read:

197.335. (1) *[An order issued under ORS 197.328 and the copy of the order mailed]* **The Land Conservation and Development Commission shall mail a copy of an enforcement order** to the local government, state agency or special district. **An order** must set forth:

(a) The nature of the noncompliance, including, but not limited to, the contents of the comprehensive plan or land use regulation, if any, of a local government that do not comply with the goals or the contents of a plan, program or regulation affecting land use adopted by a state agency or special district that do not comply with the goals. In the case of a pattern or practice of decision-making, the order must specify the decision-making that constitutes the pattern or practice, including specific provisions the *[Land Conservation and Development]* commission believes are being misapplied.

(b) The specific lands, if any, within a local government for which the existing plan or land use regulation, if any, does not comply with the goals.

(c) The corrective action decided upon by the commission, including the specific requirements, with which the local government, state agency or special district must comply. In the case of a pattern or practice of decision-making, the commission may require revisions to the comprehensive plan, land use regulations or local procedures which the commission believes are necessary to correct the pattern or practice. Notwithstanding the provisions of this section, except as provided in subsection (3)(c) of this section, an enforcement order does not affect:

(A) Land use applications filed with a local government prior to the date of adoption of the enforcement order unless specifically identified by the order;

(B) Land use approvals issued by a local government prior to the date of adoption of the enforcement order; or

(C) The time limit for exercising land use approvals issued by a local government prior to the date of adoption of the enforcement order.

(2) Judicial review of a final order of the commission is governed by the provisions of ORS chapter 183 applicable to contested cases except as otherwise stated in this section. The commission's final order must include a clear statement of findings which set forth the basis for the order. Where a petition to review the order has been filed in the Court of Appeals, the commission shall transmit to the court the entire administrative record of the proceeding under review. Notwithstanding ORS 183.482 (3) relating to a stay of enforcement of an agency order, an appellate court, before it may stay an order of the commission, shall give due consideration to the public interest in the continued enforcement of the commission's order and may consider testimony or affidavits thereon. Upon review, an appellate court may affirm, reverse, modify or remand the order. The court shall reverse, modify or remand the order only if it finds:

(a) The order to be unlawful in substance or procedure, but an error in procedure is not cause for reversal, modification or remand unless the court finds that substantial rights of any party were prejudiced thereby;

(b) The order to be unconstitutional;

(c) The order is invalid because it exceeds the statutory authority of the agency; or

(d) The order is not supported by substantial evidence in the whole record.

(3)(a) If the commission finds that in the interim period during which a local government, state agency or special district would be bringing itself into compliance with the commission's order [under ORS 197.320 or subsection (2) of this section] it would be contrary to the public interest in the conservation or sound development of land to allow the continuation of some or all categories of land use decisions or limited land use decisions, it shall, as part of its order, limit, prohibit or require the approval by the local government of applications for subdivisions, partitions, building permits, limited land use decisions or land use decisions until the plan, land use regulation or subsequent land use decisions and limited land use decisions are brought into compliance. The commission may issue an order that requires review of local decisions by a hearings officer or the Department of Land Conservation and Development before the local decision becomes final.

(b) Any requirement under this subsection may be imposed only if the commission finds that the activity, if continued, aggravates the goal, comprehensive plan or land use regulation violation and that the requirement is necessary to correct the violation.

(c) The limitations on enforcement orders under subsection (1)(c)(B) of this section do not affect the commission's authority to limit, prohibit or require application of specified criteria to subsequent land use decisions involving land use approvals issued by a local government prior to the date of adoption of the enforcement order.

(4) As part of its order [under ORS 197.320 or subsection (2) of this section], the commission may withhold grant funds from the local government to which the order is directed. As part of an order issued under this section, the commission may notify the officer responsible for disbursing state-shared revenues to withhold that portion of state-shared revenues to which the local government is entitled under ORS 221.770, 323.455, 366.762 and 366.800 and ORS chapter 471 which represents the amount of state planning grant moneys previously provided the local government by the commission. The officer responsible for disbursing state-shared revenues shall withhold state-shared revenues as outlined in this section and shall release funds to the local government or department when notified to do so by the commission or its designee. The commission may retain a portion of the withheld revenues to cover costs of providing services incurred under the order, including use of a hearings officer or staff resources to monitor land use decisions and limited land use decisions or conduct hearings. The remainder of the funds withheld under this provision shall be released to the local government upon completion of requirements of the [commission] **enforcement** order.

(5)(a) As part of its order under this section, the commission may notify the officer responsible for disbursing funds from any grant or loan made by a state agency to withhold such funds from a special district to which the order is directed. The officer responsible for disbursing funds shall withhold funds as outlined in this section and shall release funds to the special district or department when notified to do so by the commission.

(b) The commission may retain a portion of the funds withheld to cover costs of providing services incurred under the order, including use of a hearings officer or staff resources to monitor land use decisions and limited land use decisions or conduct hearings. The remainder of the funds withheld under this provision shall be released to the special district upon completion of the requirements of the commission order.

(6) As part of its order under this section, upon finding a city failed to comply with ORS 197.320 (13), the commission may, consistent with the principles in ORS 197A.130 (1), require the city to:

(a) Comply with the housing acceleration agreement under ORS 197A.130 (6).

(b) Take specific actions that are part of the city's housing production strategy under ORS 197A.100.

(c) Impose appropriate models that have been developed by department, including model ordinances, procedures, actions or anti-displacement measures.

(d) Reduce maximum timelines for review of needed housing or specific types of housing or affordability levels, [including] through ministerial approval or any other expedited existing approval process.

(e) Take specific actions to waive or amend local ordinances.

(f) Forfeit grant funds under subsection (4) of this section.

(7) The commission may institute actions or proceedings for legal or equitable remedies in the Circuit Court for Marion County or in the circuit court for the county to which the [commission's] order is directed or within which all or a portion of the applicable city is located to enforce compliance with the provisions of any order issued under this section or to restrain violations thereof. Such actions or proceedings may be instituted without the necessity of prior agency notice, hearing [and] or order on an alleged violation.

(8) As used in this section, "enforcement order" or "order" means an order issued under ORS 197.320 or section 3 of this 2024 Act as may be modified on appeal under subsection (2) of this section.

SECTION 65. ORS 183.471 is amended to read:

183.471. (1) When an agency issues a final order in a contested case, the agency shall maintain the final order in a digital format that:

- (a) Identifies the final order by the date it was issued;
- (b) Is suitable for indexing and searching; and
- (c) Preserves the textual attributes of the document, including the manner in which the document is paginated and any boldfaced, italicized or underlined writing in the document.

(2) The Oregon State Bar may request that an agency provide the Oregon State Bar, or its designee, with electronic copies of final orders issued by the agency in contested cases. The request must be in writing. No later than 30 days after receiving the request, the agency, subject to ORS 192.338, 192.345 and 192.355, shall provide the Oregon State Bar, or its designee, with an electronic copy of all final orders identified in the request.

(3) Notwithstanding ORS 192.324, an agency may not charge a fee for the first two requests submitted under this section in a calendar year. For any subsequent request, an agency may impose a fee in accordance with ORS 192.324 to reimburse the agency for the actual costs of complying with the request.

(4) For purposes of this section, a final order entered in a contested case by an administrative law judge under ORS 183.625 (3) is a final order issued by the agency that authorized the administrative law judge to conduct the hearing.

(5) This section does not apply to final orders by default issued under ORS 183.417 (3) or to final orders issued in contested cases by:

- (a) The Department of Revenue;
- (b) The State Board of Parole and Post-Prison Supervision;
- (c) The Department of Corrections;
- (d) The Employment Relations Board;
- (e) The Public Utility Commission of Oregon;
- (f) The Oregon Health Authority;
- (g) The Land Conservation and Development Commission, **except for enforcement orders under section 3 of this 2024 Act;**
- (h) The Land Use Board of Appeals;
- (i) The Division of Child Support of the Department of Justice;
- (j) The Department of Transportation, if the final order relates to the suspension, revocation or cancellation of identification cards, vehicle registrations, vehicle titles or driving privileges or to the assessment of taxes or stipulated settlements in the regulation of vehicle related businesses;
- (k) The Employment Department or the Employment Appeals Board, if the final order relates to benefits as defined in ORS 657.010;
- (L) The Employment Department, if the final order relates to an assessment of unemployment tax for which a hearing was not held;
- (m) The Employment Department, if the final order relates to:
 - (A) Benefits, as defined in ORS 657B.010;
 - (B) Employer and employee contributions under ORS 657B.150 for which a hearing was not held;

(C) Employer-offered benefit plans approved under ORS 657B.210 or terminated under ORS 657B.220; or

(D) Employer assistance grants under ORS 657B.200; or

(n) The Department of Human Services, if the final order was not related to licensing or certification.

SECTION 66. ORS 455.770 is amended to read:

455.770. (1) In addition to any other authority and power granted to the Director of the Department of Consumer and Business Services under ORS 446.003 to 446.200, 446.225 to 446.285, 446.395 to 446.420, 479.510 to 479.945, 479.995 and 480.510 to 480.670 and this chapter and ORS chapters 447, 460 and 693 **and sections 1 to 5 of this 2024 Act**, with respect to municipalities, building officials and inspectors, if the director has reason to believe that there is a failure to enforce or a violation of any provision of the state building code or ORS 446.003 to 446.200, 446.225 to 446.285, 446.395 to 446.420, 479.510 to 479.945, 479.995 or 480.510 to 480.670 or this chapter or ORS chapter 447, 460 or 693 or any rule adopted under those statutes, the director may:

(a) Examine building code activities of the municipality;

(b) Take sworn testimony; and

(c) With the authorization of the Office of the Attorney General, subpoena persons and records to obtain testimony on official actions that were taken or omitted or to obtain documents otherwise subject to public inspection under ORS 192.311 to 192.478.

(2) The investigative authority authorized in subsection (1) of this section covers the violation or omission by a municipality related to enforcement of codes or administrative rules, certification of inspectors or financial transactions dealing with permit fees and surcharges under any of the following circumstances when:

(a) The duties are clearly established by law, rule or agreement;

(b) The duty involves procedures for which the means and methods are clearly established by law, rule or agreement; or

(c) The duty is described by clear performance standards.

(3) Prior to starting an investigation under subsection (1) of this section, the director shall notify the municipality in writing setting forth the allegation and the rules or statutes pertaining to the allegation and give the municipality 30 days to respond to the allegation. If the municipality does not satisfy the director's concerns, the director may then commence an investigation.

(4) If the Department of Consumer and Business Services or the director directs corrective action[, *the following shall be done*]:

(a) The corrective action [*shall*] **must** be in writing and served on the building official and the chief executive officers of all municipalities affected;

(b) The corrective action [*shall*] **must** identify the facts and law relied upon for the required action; and

(c) A reasonable time [*shall*] **must** be provided to the municipality for compliance.

(5) The director may revoke any authority of the municipality to administer any part of the state building code or ORS 446.003 to 446.200, 446.225 to 446.285, 446.395 to 446.420, 479.510 to 479.945, 479.995 or 480.510 to 480.670 or this chapter or ORS chapter 447, 460 or 693 or any rule adopted under those statutes if the director determines after a hearing conducted under ORS 183.413 to 183.497 that:

(a) All of the requirements of this section and ORS 455.775 and 455.895 were met; and

(b) The municipality did not comply with the corrective action required.

CAPTIONS

SECTION 67. The unit and section captions used in this 2024 Act are provided only for the convenience of the reader and do not become part of the statutory law of this state or express any legislative intent in the enactment of this 2024 Act.

EFFECTIVE DATE

SECTION 68. This 2024 Act takes effect on the 91st day after the date on which the 2024 regular session of the Eighty-second Legislative Assembly adjourns sine die.

Passed by Senate February 29, 2024

.....
Obadiah Rutledge, Secretary of Senate

.....
Rob Wagner, President of Senate

Passed by House March 4, 2024

.....
Dan Rayfield, Speaker of House

Received by Governor:

.....M.,....., 2024

Approved:

.....M.,....., 2024

.....
Tina Kotek, Governor

Filed in Office of Secretary of State:

.....M.,....., 2024

.....
LaVonne Griffin-Valade, Secretary of State



Council Study Session

April 1, 2024

Agenda Item	Homeless Services Masterplan Subcommittee Interim Report		
From	Linda Reid	Housing Program Manager	
Contact	Linda.reid@ashland.or.us		
Item Type	Requested by Council ☒ Update ☐ Request for Direction ☐ Presentation ☐		

SUMMARY

In November of 2023 the Council gave direction to the Housing and Human Services Committee to prepare a draft masterplan to guide the City's investment in homeless services. The Council asked that the plan include broad stakeholder input, and should identify the scope of the problems, gaps and shortcomings in the existing resources and services, and an overview of other regional strategies and efforts by partner organizations to address the needs of homeless populations throughout Jackson County.

To that end, the City advertised broadly to find volunteers to serve on a subcommittee devoted to this task. The Subcommittee applicants were reviewed by the Housing and Human Services Committee and were appointed at their regular meeting in January. The Homeless Services Masterplan Subcommittee (HSMS) has been meeting twice a month since January 30th, and in that time has agreed to an approach, a timeline, and set of tasks. The documents that detail those areas are attached to the Council Communication.

POLICIES, PLANS & GOALS SUPPORTED

Regional Cooperation: including in support for public safety and homelessness.

BACKGROUND AND ADDITIONAL INFORMATION

The HSMS has identified an approach and a list of tasks to address how to approach this complex and wide-ranging task. Given the time constraints and the limitations of a community led volunteer citizens subcommittee, the approach and timeline provided to the Council presented are what the subcommittee has identified as a reasonable and accomplishable plan of action. The Subcommittee members have appointed an Executive Committee of three members to meet in-between meetings to set the meeting agendas and keep the subcommittee on task and moving forward. The Executive Committee members are prepared to provide a status report to the Council regarding the Subcommittee's approach, tasks, timeline and plan for community engagement and gathering stakeholder input. Furthermore, the executive committee would welcome any clarity or direction from the Council regarding the approach and timelines the HSMS has planned.

FISCAL IMPACTS

The Council did not allocate any funding to this activity. Additional investments may be needed to address any action items that the Council may wish to take to address any gaps or resource needs identified through the master planning document developed through this process.





Council Study Session

SUGGESTED NEXT STEPS

The Community Development Department will continue its collaboration with the HSMS to finalize the process and prepare a masterplan for presentation to the Council at their final June meeting. Should it be necessary to complete the project beyond the Council's original deadline, the HSMS may later propose extending the limited duration subcommittee's term.

REFERENCES & ATTACHMENTS

- HSMS memo: Approach and Tasks
- HSMS memo: Timeline Summary

Memo

DATE: February 28, 2024
TO: Homeless Services Masterplan Subcommittee
FROM: Executive Committee
RE: Approach, Task, and Timeline

Approach

The Subcommittee will gain an understanding of the level of homelessness and the homeless response services and systems in Ashland and affecting Ashland.

The Subcommittee will prepare an inventory of local services and gather data currently available about people experiencing homelessness.

The Subcommittee will prepare an outline for a "Money Map" to illustrate the current investments in responding to the homeless crisis. *NOTE: Time will not allow for comprehensive data collection, but by providing an outline and some examples, the Subcommittee's report will offer a framework for further fiscal analysis.*

Within the time and resources allowed, the Subcommittee will consider the strengths and weaknesses of the current homeless response system and gather perspectives from a cross-section of the Ashland community about the problem and how the City of Ashland can better address the complex issues of homelessness in Ashland.

The Subcommittee's findings, including the areas of greatest concern/need, current strengths in the homeless response system, and potential opportunities will be included in the Subcommittee Report.

Preliminary Outline of the Subcommittee Report:

1. The Players Addressing Homelessness
2. The Responsibilities of a Continuum of Care (CoC)
3. Services Inventory
4. Data about People and Programs
5. Outline for a Money Map
6. Community Perspectives
7. Subcommittee Conclusions

Community Development Department

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

Tel: 541.488.5305
Fax: 541.552.2059
TTY: 800.735.2900

Memo

The Subcommittee (at least in this phase) will not develop options for investing resources, as identifying such options would be dependent on specific priorities or desired outcomes/objectives.

After specific priorities or desired outcomes/objectives are identified, a second phase could include an assets inventory, completion of the "money map," and researching best practices to develop options built on those resources.

Tasks

1. UNDERSTAND THE PLAYERS ADDRESSING HOMELESSNESS

a. Language: Terms and Acronyms

b. Major Players and Roles, Resources, & Responsibilities re: Homelessness

i. Government

- Federal
- State
- County
- School District
- Housing Authority
- City

ii. Coalitions, Task Forces, and Committees

1. Jackson County Continuum of Care (CoC)
2. Jackson County Homeless Task Force
3. Ashland Housing & Social Services Commission

iii. Agencies, Organizations, and Programs

1. Homeless-Focused
e.g., ACCESS, OHRA, Rogue Retreat, Hearts with a Mission, St. Vincent de Paul shelter, Magdalene Home, Maslow Project, The Salvation Army Hope House
2. Aligned Social Services
e.g., Community Works, Family Nurturing Center, The Arc, Unete
3. Other Service Providers
e.g., DHS, Health Care, Workforce Development, Food Bank
4. Other Services
e.g., Faith-based, and community-based meal programs, clothing closets, and other good works

2. UNDERSTAND THE RESPONSIBILITIES OF A COC

[CoC: Continuum of Care Program – HUD Exchange](#)

Community Development Department

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

Tel: 541.488.5305
Fax: 541.552.2059
TTY: 800.735.2900

Memo

a. Organization

- i. Governing Body and Operations
- ii. Collaborative Applicant

b. Planning & Partnerships

- i. Representation / Participation
- ii. Annual Needs Assessment
- iii. Homeless Response (plan/system)

c. Operating a Coordinated Entry System

- i. CE Management Entity
- ii. System Design

d. Operating an HMIS and Submitting Reports to HUD

- i. Homeless Management Information System (HMIS)
- ii. HMIS Lead Agency
- iii. Reporting to HUD
 - 1. Point-In-Time Count (PIT, sheltered and unsheltered)
 - 2. Housing Inventory Count (HIC)
 - 3. Longitudinal Systems Analysis (LSA)
 - 4. System Performance Measures (SPMs)
 - 5. Annual Performance Report (APR)

e. Evaluating HUD CoC-funded Programs and ESG-funded Programs

f. Identifying Priorities for Local HUD CoC Funding

g. Submitting Annual CoC Consolidated Application to HUD

h. Informing Consolidated Plans of Local Jurisdictions

3. PREPARE AN INVENTORY OF SERVICES

a. A matrix of homeless services:

- i. Service Type
 - 1. street outreach,
 - 2. supportive services only,
 - 3. emergency shelter,

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Memo

4. transitional housing,
5. rapid rehousing,
6. permanent supportive housing,
7. other permanent housing
- ii. Populations served (men, women, families, DV survivors, youth, chronically homeless, veterans, or other specific population)
- iii. Services provided within each program (case management, meals, childcare, education, transportation, etc.)
- iv. Capacity (caseload, beds, households; and annual use rates)

b. A matrix of other (not homeless-specific) services

Note: gather from existing resource lists, as time and resources do not allow the Subcommittee to ensure a comprehensive listing of community services.

c. If time allows, complete an analysis of barriers to accessing services

(e.g., location/transportation, limited language accommodations, the need for a social security card, home address or proof of residency)

4. GATHER HMIS DATA ABOUT PEOPLE AND PROGRAMS

a. Numbers and Demographics (age, gender, race, and ethnicity, etc.)

- i. People experiencing homelessness
- ii. People assessed through the Coordinated Entry System
- iii. People served by each homeless service type (outreach, shelter, transitional housing, RRH, PSH, other permanent housing)
- iv. Households and individuals moved into permanent housing
- v. Households and individuals retaining permanent housing

b. Subpopulations

- i. Veterans
- ii. Families with Minor Children
- iii. K-12 students experiencing homelessness and housing insecurity
- iv. Fleeing Domestic Violence
- v. Experiencing Chronic Homelessness

c. Other Information

- i. Health Insurance
- ii. Chronic health conditions
- iii. Other, tba

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Memo

5. GATHER OTHER DATA ABOUT PEOPLE AND PROGRAMS

- a. School District McKinney Vento Programs
- b. Jackson County Housing Authority
- c. Affordable Housing Inventory (by City and operator) and year of expiration
- d. People served by emergency services (e.g., first responders, emergency departments) who were identified as homeless, as a number and as a percentage of those served.

6. PREPARE AN OUTLINE FOR A MONEY MAP

- a. Government funds, sources, and how utilized
 - i. Federal, including HUD CoC, CDBG, public housing, DOJ, etc.
 - ii. State, including OHCS, DHS, DOC, etc.
 - iii. Local, including county and city
- b. Annual budgets and funding sources for each homeless service
- c. Governor's Executive Order funds / HB 5019, SB 5511, SB 5506

7. GATHER COMMUNITY PERSPECTIVES

a. Questions / Topics of Inquiry (tentative)

- i. What is the problem?
- ii. What is the City of Ashland's role?
- iii. Who else should have a role? And what is that role?

b. Representation (tentative)

- i. Community Sectors
 1. Businesses
 2. Non-profit organizations
 3. Faith-based organizations
 4. Law Enforcement
 5. Healthcare (mental, physical, behavioral)
 6. Education (early learning, k-12, higher education)
 7. Public Housing Authority
 8. Affordable housing developers
 9. Rental property management
 10. Employment and workforce programs
- ii. Individual Representation
 1. People experiencing homelessness now

Community Development Department

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

Tel: 541.488.5305
Fax: 541.552.2059
TTY: 800.735.2900



Memo

2. People who have experienced homelessness in the past
3. Diversity in racial and ethnic backgrounds
4. Diversity in ages / age groups
5. Diversity in gender identity and sexual orientation
6. Diversity in political viewpoints
7. Diversity in income levels
8. Diversity in residency in Ashland (new residents, long-term)
9. Diversity in household composition (singles, couples, families)

b. Process (TBD)

1. Online surveys
2. Written surveys
3. Individual interviews
4. Focus groups

8. CONDUCT AN ANALYSIS OF STRENGTHS, WEAKNESSES, AND POTENTIAL OPPORTUNITIES USING INFORMATION ABOUT:

- a. Homeless Services
- b. Other Community Resources
- c. The Continuum of Care
- d. Demographic and Service Data
- e. Financial Investments
- f. Community Perspectives

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Component	Information	Who	28-Feb	2/29 HHSAC	3/5 City Council	12-Mar	27-Mar	3/28 HHSAC	4/1 or 4/2 City Council	9-Apr	24-Apr	7-May	22-May	4-Jun	11-Jun	26-Jun	TBA HHSAC	TBA Council
The Players Addressing Homelessness	Name, purpose (role or mission statement), major functions, type of governing body or authority, geographic area served (city or cities, county or counties, state, nation), website URL	Staff	PRESENTATION : The Players Addressing Homelessness															
The Responsibilities of a Continuum of Care (CoC)	Organization Planning Coordinated Entry System Homeless Management Information System Reports to HUD Project Monitoring Local Funding Competition Annual Consolidated Plan Informing Local Jurisdictions	TBA				PRESENTATION & DISCUSSION: Responsibilities of a CoC DISCUSSION: Identify info. to gather about OR-502					PRESENTATION, DISCUSSION & SWOT ANALYSIS: The Local CoC							
Services Inventory	Homeless Services Matrix	4 people	assign SO/SSO				Update on Service Inventory progress			PRESENTATION: Services Inventory			ANALYSIS: SWOT of Services Inventory					
		5 people	assign ES/TH															
		3 people	assign PH															
	Other (non-homeless) Services Matrix Barriers to Accessing Services	Staff All								DISCUSSION: Barriers to Accessing Services								
Data about People and Programs	HMIS Data	Jan					Update on data collection progress			PRESENTATION: Data			ANALYSIS: Data					
	School McKinney-Vento Data	Staff																
	Jackson Co. Housing Authority	Staff																
	First Responders	Echo																
	Emergency Departments	Echo																
	Affordable Housing Inventory	Staff																
Outline for Money Map	Government Funding - Sources, purpose, and most current allocation	TBA																
	Major Program Budgets - Annual budget by source (government, foundations, community)	TBA																
Community Perspectives	See list of various populations	TBA				Decide on populations and who will work on how to reach each population	Review plans on how to reach each population. Decide on questions.			Update on community input progress	Review public input highlights, and decide who will prepare the findings	PRESENTATION N & DISCUSSION: Community input / findings						
Communications with HHSAC and City Council	Plan communications with the Health & Human Services Advisory Commission and City Council	All	Decide content and format for reporting to HHSAC and City Council	2/29 - Provide HHSAC w/ HMPS Approach, Tasks & Timeline	3/5 - Provide Council w/ HMPS Approach, Tasks & Timeline		Decide content and format for reporting to HHSAC and City Council	3/28 - Share plans for community outreach with HHSAC	4/1 - Study Session or 4/2 - Share plans for community					Review draft report. Suggest revisions. Discuss format for reporting to HHSAC and City Council	Review final report and plans for sharing with HHSAC and City Council		Share final report with HHSAC	Share final report with City Council

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Better Together

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
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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:

7/1/24

Name: (Please Print)

Debra Neisewander

Ashland Resident:

☒ YES ☐ NO City: _____

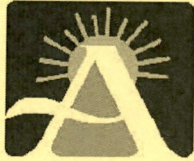
Agenda Topic/Item Number:

Public Forum Topic (Non-agenda Item):

nite kwn

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.



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Date:

4-1-24

Name: (Please Print)

Scott Butler

Ashland Resident:

☒

YES

☐

NO

City: _____

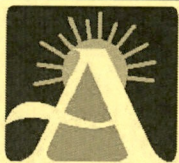
Agenda Topic/Item Number:

Homeless lawn

Public Forum Topic (Non-agenda Item):

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Date:

4/1/24

Name: (Please Print)

Nathan Yannetta

Ashland Resident:



YES



NO

City: _____

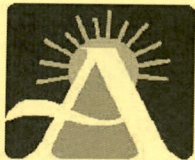
Agenda Topic/Item Number:

Night Lament / Homeless

Public Forum Topic (Non-agenda Item):

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Date:

4-1-24

Name: (Please Print)

Karen Greenwood

Ashland Resident:

☒

YES

☐

NO

City:

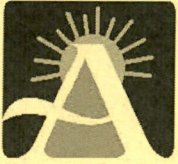
Agenda Topic/Item Number:

Night Lown homeless

Public Forum Topic (Non-agenda Item):

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Date:

4/1/24

Name: (Please Print)

Yukon Smith

Ashland Resident:



YES



NO

City: _____

Agenda Topic/Item Number:

10 Night lawn/Homelessness

Public Forum Topic (Non-agenda Item):

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