



Council Business Meeting Agenda

ASHLAND CITY COUNCIL BUSINESS MEETING AGENDA

Tuesday, December 3, 2024
Council Chambers, 1175 E Main Street

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

HELD HYBRID (In-Person or Zoom Meeting Access)

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

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

**Revised 12/2/2024*

5:00 p.m. Executive Session

1. To consider information or records that are exempt by law from public inspection pursuant to ORS 192.660 (2)(f).

6:00 p.m. Regular Business Meeting

I. CALL TO ORDER

- a. Land Acknowledgement**

II. PLEDGE OF ALLEGIANCE

III. ROLL CALL

IV. MAYOR'S / CHAIR OF THE COUNCIL ANNOUNCEMENT

V. APPROVAL OF MINUTES

VI. CONSENT AGENDA

- a. Approval of Liquor License for Masala Bistro and Bar
- b. Resolution 2024-31 Declaring the Canvass of the Vote of Election held in and for the City of Ashland, Oregon November 5, 2024.
- c. Social Equity and Racial Justice Advisory Committee Appointment
- d. Housing and Human Services Advisory Committee Appointment

VII. SPECIAL PRESENTATIONS

- a. Western Rivers Conservancy

VIII. PUBLIC FORUM

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

IX. PUBLIC HEARING

- a. ORDINANCE 3253 An ordinance amending AMC Section 10.120.010 Enhanced Law Enforcement Area and Persistent Violation to add a CAP East.

X. ORDINANCES, RESOLUTIONS AND CONTRACTS

- a. Second Reading - ORD 3244 Amending AMC 2.10 to Establish Uniform Policies and Operating Procedures for Advisory Committees and Commissions





Council Business Meeting Agenda

XI. UNFINISHED BUSINESS

- a. USDA RESP Loan Update and Program Roll-Out Plan

XII. NEW BUSINESS

- a. Affordable Housing Trust Fund Reallocation Request: Sunstone Housing Collaborative
- b. Appointment of Councilor Kaplan to Sunstone's selection committee
- c. Council Adoption of 2200 Ashland Street Master Plan
- d. 2200 Ashland Street Facility Plan Ad Hoc Committee

XIII. CITY MANAGER REPORT

- a. City Manager Report

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

XV. ADJOURNMENT

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).

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

**** LAND ACKNOWLEDGEMENT**

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

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





Council Business Meeting

Date: December 3, 2024

Agenda Item	Approval of Liquor License for Masala Bistro and Bar
From	Alissa Kolodzinski, City Recorder
Contact	alissa.kolodzinski@ashland.or.us

SUMMARY

This is a request for approval of a liquor license application for Masala Bistro and Bar DBA Arjun and Kuldeep LLC located at 258 A Street 3B.

POLICIES, PLANS & GOALS SUPPORTED

AMC Chapter 6.32 Liquor License Review

BACKGROUND AND ADDITIONAL INFORMATION

This is an application for a Change of Ownership – Full on Premises

FISCAL IMPACTS

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

The Planning, Police, and Fire departments have reviewed the application and recommend approval of the liquor license. This business complies with the City's land use requirements and has a Business License.

I move to approve the liquor license for Masala Bistro and Bar.

REFERENCES & ATTACHMENTS

1. Masala Bistro - Change of Ownership_Redacted





Instructions for Local Government Recommendation – Liquor License

Per OAR 845-005-0304(3): The Commission requires an applicant for issuance of a new license issued under ORS chapter 471, to provide written notice of the application to the local government in the form of a complete, accurate, and legible Commission form.

The local government is as follows:

- (a) If the address of the premises proposed to be licensed is within a city's limits, the local government is the city.
- (b) If the address of the premises proposed to be licensed is not within a city's limits, the local government is the county.

INSTRUCTIONS:

- **Section 1: Applicant** completes Section 1 of this form and submits it to the appropriate city or county jurisdiction. Applicant verifies with the local government whether additional forms or fees are required. **Applicant completes payment to local jurisdiction for processing application if they require fees. This does not include OLCC license fees.**
- **Section 2: Local government** completes Section 2 to prove acceptance of recommendation form and returns form to the applicant. **Applicant** may upload the accepted form with Sections 1 & 2 filled out to CAMP or wait until recommendation is made before submitting to OLCC via CAMP.
- **Section 3: Once recommendation is determined, local government** completes Section 3 of this form and returns it to the applicant. **Applicant** uploads the complete form and any supporting information provided by the city or county to CAMP.

Annual Liquor License Types	
Off-Premises Sales	Brewery
Limited On-Premises Sales	Distillery
Full On-Premises, Commercial	Grower Sales Privilege
Full On-Premises, Caterer	Winery
Full On-Premises, Other Public Location	Wholesale Malt Beverage & Wine
Full On-Premises, For Profit Private Club	Warehouse
Full On-Premises, Non Profit Private Club	
Full On-Premises, Public Passenger Carrier	
Brewery Public House	



Local Government Recommendation – Liquor License

Section 1 – Submission - To be completed by Applicant:

License Information

Legal Entity/Individual Applicant Name(s): Arjun and Kuldeep LLC

Proposed Trade Name: Masala Bistro and Bar

Premises Address: 258 A Street

Ste: 3B

City: Ashland

County: Jackson

Zip: 97520

Application Type: ☐ New License Application ☒ Change of Ownership ☐ Change of LocationLicense Type: Full Premise Sale ☐ Additional Location for an Existing License

Application Contact Information

Contact Name: Arjun Sharma or Kuldeep Choudhary

Phone: [REDACTED]

Mailing Address: [REDACTED]

City: [REDACTED]

State: [REDACTED]

Zip: [REDACTED]

Email Address: [REDACTED]

Business Details

Please check all that apply to your proposed business operations at this location:

- ☐ Manufacturing/Production at this location
- ☐ Retail Off-Premises Sales at this location
- ☒ Retail On-Premises Sales & Consumption at this location

If there will be On-Premises Consumption at this location:

- ☒ Indoor Consumption ☒ Outdoor Consumption
- ☒ Malt Beverage/Wine/Cider Consumption ☒ Distilled Spirits Consumption
- ☒ Proposing to Allow Minors

Section 1 Continued on next page



Local Government Recommendation – Liquor License

Section 1 Continued – Submission - To be completed by Applicant:

Legal Entity/Individual Applicant Name(s): Arjun and Kuldeep LLC

Proposed Trade Name: Masala Bistro and Bar

After completing section 1, please submit your application to the local government for recommendation

Section 2 – Acceptance - To be completed by Local Government:

Local Government Recommendation Proof of Acceptance

After accepting this form, please return a copy to the applicant with received and accepted information

City or County Name: City of Ashland

Optional Date Received Stamp

Date Application Received: 11.12.2024

Received by: Kerrick Gooden

Section 3 – Recommendation - To be completed by Local Government:

- ☐ **Recommend this license be granted**
- ☐ **Recommend this license be denied** (Please include documentation that meets [OAR 845-005-0308](#))
- ☐ **No Recommendation/Neutral**

Name of Reviewing Official:

Title:

Date:

Signature:

After providing your recommendation and signature, please return this form to the applicant.



Council Business Meeting

Date: December 3, 2024

Agenda Item	Resolution 2024-31 Declaring the Canvass of the Vote of Election held in and for the City of Ashland, Oregon November 5, 2024.
From	Alissa Kolodzinski, City Recorder
Contact	alissa.kolodzinski@ashland.or.us

SUMMARY

Resolution 2024-31 Declaring the Canvass of the Vote of Election held in and for the City of Ashland, Oregon November 5, 2024 and Mayoral Proclamation.

POLICIES, PLANS & GOALS SUPPORTED

BACKGROUND AND ADDITIONAL INFORMATION

Article VII, Section 6, of the Ashland City Charter requires that the Canvass of the Vote for all city elections be made, and the results of the election “shall be entered in the record of the proceedings of the council.” The Resolution sets forth the vote for each position and the proclamation sets forth the name of each person elected to office, all as required by this chapter section.

FISCAL IMPACTS

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move to approve Resolution 2024-31 declaring the Canvass of the Vote of the election held in and for the City of Ashland, Oregon on November 5, 2024 and Mayoral Proclamation.

REFERENCES & ATTACHMENTS

1. RESO 2024-31 Canvass of the Vote2
2. Canvass of the Vote Proclamation_2024

RESOLUTION NO. 2024-31

A RESOLUTION DECLARING THE CANVASS OF THE VOTE OF THE ELECTION HELD IN AND FOR THE CITY OF ASHLAND, OREGON ON NOVEMBER 5, 2024

RECITALS:

ASHLAND MAYOR

Tonya Graham	<u>8083</u>
Write-In	631

COUNCIL MEMBER POSITION 1

Douglas Knauer	<u>6644</u>
Teresa Cisneros	3515
Write-In	34

COUNCIL MEMBER POSITION 2

Jeff Dahle	<u>6833</u>
Kelly Marcotulli	3627
Write-In	30

COUNCIL MEMBER POSITION 3

Dylan Bloom	<u>6122</u>
Eric Navickas	4619
Write-In	35

COUNCIL MEMBER POSITION 5

Gina DuQuenne	<u>7721</u>
Write-In	167

PARKS COMMISSIONER POSITION 1

Michael Gardiner	<u>6592</u>
Fer Mejia	3703
Write-In	35

PARKS COMMISSIONER POSITION 2

Daniel Weiner	<u>3766</u>
Rick Vann	3508
Ian Cropper	2720
Write-In	45

MEASURE 15-232: OPEN SEAT ELECTION

Yes	<u>9138</u>
No	2144

MEASURE 15-233: MUNICIPAL JUDGE AS AN APPOINTIVE POSITION

Yes	3791
No	<u>7694</u>

MEASURE 15-234:
APPROVING ASHALND RESOLUTION 2024-05 AUTHORITY TO ISSUE WATER
REVENUE BONDS

Yes	<u>8660</u>
No	3320

THE CITY OF ASHLAND HEREBY RESOLVES AS FOLLOWS:

SECTION 1. Tonya Graham is declared to be the duly elected Ashland Mayor.

SECTION 2. Douglas Knauer is declared to be the duly elected Council Member for Position No 1.

SECTION 3. Jeff Dahle is declared to be the duly elected Council Member for Position No 2.

SECTION 4. Dylan Bloom is declared to be the duly elected Council Member for Position No 3.

SECTION 5. Gina DuQuenne is declared to be the duly elected Council Member for Position No 5.

SECTION 6. Michael Gardiner is declared to be the duly elected Parks Commissioner for Position No. 1.

SECTION 7. Daniel Weiner is declared to be the duly elected Parks Commissioner for Position No. 2.

SECTION 8. MEASURE 15-232 is declared to be approved by the voters.

SECTION 9. MEASURE 15-233 is declared to have failed by the voters.

SECTION 10. MEASURE 15-234 is declared to be approved by the voters.

SECTION 11. This resolution is effective upon adoption

This resolution was duly PASSED and ADOPTED this 3rd day of December 2024, and takes effect upon signing by the Mayor.

Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this 3rd day of December 2024.

Tonya Graham, Mayor

Reviewed as to form:

Douglas M. McGeary, Acting City Attorney

Statement of Votes Cast by Geography

Page: 1 of 2

Jackson County, Oregon, November 5, 2024 General Election, Nov 05, 2024

2024-11-29

All Precincts, City of Ashland, All Counter Groups, All ScanStations, City of Ashland, Council Member, Position 1, City of Ashland, Council Member, Position 2, City of Ashland, Council Member, Position 3,

15:01:48

City of Ashland, Council Member, Position 5, City of Ashland, Mayor, City of Ashland, Park Commissioner, Position 1, City of Ashland, Park Commissioner, Position 2, Measure 15-232 City of Ashland (Open Seat Election), Measure 15-233 City of Ashland (Municipal Judge), Measure 15-234

City of Ashland (Resolution 2024-05), All Boxes

Official Abstract-Ashland

Total Ballots Cast: 13259, Registered Voters: 16207, Overall Turnout: 81.81%

4 precincts reported out of 4 total

Choice	Votes	Vote %
All Precincts		

City of Ashland, Mayor (Vote for 1)**13259 ballots (2 over voted ballots, 2 overvotes, 4543 undervotes), 16207 registered voters, turnout 81.81%**

Tonya Graham	8083	92.76%
Write-in	631	7.24%
Total	8714	100.00%
Overvotes	2	
Undervotes	4543	

City of Ashland, Council Member, Position 1 (Vote for 1)**13259 ballots (0 over voted ballots, 0 overvotes, 3066 undervotes), 16207 registered voters, turnout 81.81%**

Douglas Knauer	6644	65.18%
Teresa Cisneros	3515	34.48%
Write-in	34	0.33%
Total	10193	100.00%
Overvotes	0	
Undervotes	3066	

City of Ashland, Council Member, Position 2 (Vote for 1)**13259 ballots (1 over voted ballots, 1 overvotes, 2768 undervotes), 16207 registered voters, turnout 81.81%**

Kelly Marcotulli	3627	34.58%
Jeff Dahle	6833	65.14%
Write-in	30	0.29%
Total	10490	100.00%
Overvotes	1	
Undervotes	2768	

City of Ashland, Council Member, Position 3 (Vote for 1)**13259 ballots (2 over voted ballots, 2 overvotes, 2481 undervotes), 16207 registered voters, turnout 81.81%**

Dylan Bloom	6122	56.81%
Eric Navickas	4619	42.86%
Write-in	35	0.32%
Total	10776	100.00%
Overvotes	2	
Undervotes	2481	

City of Ashland, Council Member, Position 5 (Vote for 1)**13259 ballots (2 over voted ballots, 2 overvotes, 5369 undervotes), 16207 registered voters, turnout 81.81%**

Gina DuQuenne	7721	97.88%
Write-in	167	2.12%
Total	7888	100.00%
Overvotes	2	
Undervotes	5369	

City of Ashland, Park Commissioner, Position 1 (Vote for 1)**13259 ballots (1 over voted ballots, 1 overvotes, 2928 undervotes), 16207 registered voters, turnout 81.81%**

Michael Gardiner	6592	63.81%
Fer Mejia	3703	35.85%
Write-in	35	0.34%
Total	10330	100.00%
Overvotes	1	
Undervotes	2928	

Statement of Votes Cast by Geography

Page: 2 of 2

Jackson County, Oregon, November 5, 2024 General Election, Nov 05, 2024

2024-11-29

All Precincts, City of Ashland, All Counter Groups, All ScanStations, City of Ashland, Council Member, Position 1, City of Ashland, Council Member, Position 2, City of Ashland, Council Member, Position 3, City of Ashland, Council Member, Position 5, City of Ashland, Mayor, City of Ashland, Park Commissioner, Position 1, City of Ashland, Park Commissioner, Position 2, Measure 15-232 City of Ashland (Open Seat Election), Measure 15-233 City of Ashland (Municipal Judge), Measure 15-234 City of Ashland (Resolution 2024-05), All Boxes

15:01:48

Official Abstract-Ashland

Total Ballots Cast: 13259, Registered Voters: 16207, Overall Turnout: 81.81%

4 precincts reported out of 4 total

Choice	Votes	Vote %
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City of Ashland, Park Commissioner, Position 2 (Vote for 1)

13259 ballots (3 over voted ballots, 3 overvotes, 3217 undervotes), 16207 registered voters, turnout 81.81%

Daniel Weiner	3766	37.51%
Rick Vann	3508	34.94%
Ian Cropper	2720	27.09%
Write-in	45	0.45%
Total	10039	100.00%
Overvotes	3	
Undervotes	3217	

Measure 15-232 City of Ashland (Open Seat Election) (Vote for 1)

13259 ballots (2 over voted ballots, 2 overvotes, 1975 undervotes), 16207 registered voters, turnout 81.81%

Yes	9138	81.00%
No	2144	19.00%
Total	11282	100.00%
Overvotes	2	
Undervotes	1975	

Measure 15-233 City of Ashland (Municipal Judge) (Vote for 1)

13259 ballots (2 over voted ballots, 2 overvotes, 1772 undervotes), 16207 registered voters, turnout 81.81%

Yes	3791	33.01%
No	7694	66.99%
Total	11485	100.00%
Overvotes	2	
Undervotes	1772	

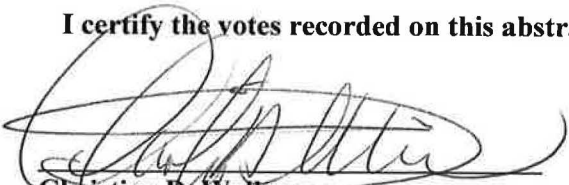
Measure 15-234 City of Ashland (Resolution 2024-05) (Vote for 1)

13259 ballots (1 over voted ballots, 1 overvotes, 1278 undervotes), 16207 registered voters, turnout 81.81%

Yes	8660	72.29%
No	3320	27.71%
Total	11980	100.00%
Overvotes	1	
Undervotes	1278	

**State of Oregon
ABSTRACT OF VOTE**

I certify the votes recorded on this abstract correctly summarizes the tally of votes cast at the election indicated.


Christine D. Walker
County Clerk & Recorder
Jackson County, Oregon



11-29-2024
Date



A Proclamation on the Election Held in the City of Ashland November 5, 2024

WHEREAS, the following persons were elected to the positions set forth next to their names,

City of Ashland Mayor Tonya Graham
Council Member Position #1 Douglas Knauer
Council Member Position #2 Jeff Dahle
Council Member Position #3 Dylan Bloom
Council Member Position #5 Gina DuQuenne
Parks Commissioner Position # 1 Michael Gardiner
Parks Commissioner Position # 2 Daniel Weiner

Measure 15-232 Shall the City change its Charter election protocol to have an open seat election for City Council? **Approved**

Measure 15-233 Shall the City Charter remove the Municipal Judge as an elected position and have it appointed by Mayor and Council? **Failed**

Measure 15-234 Should the City be authorized to issue up to \$75,000,000 in revenue bonds to finance construction of water system improvements? **Approved**

NOW, THEREFORE, I, Tonya Graham, Mayor of the City of Ashland, Oregon, on behalf of the City Council, do hereby proclaim that at the election held in the City of Ashland Oregon on the 5th day of November 2024, there was submitted to the voters the question of the elections of persons to various elective offices in the City and three Measures.

It is hereby declared that the above persons were elected to the positions set forth next to their names and Ballot Measures approved or failed.

Dated this 3rd day of December 2024.

Tonya Graham, Mayor

Alissa Kolodzinski, City Recorder





Council Business Meeting

Date: December 3, 2024

Agenda Item	Social Equity and Racial Justice Advisory Committee Appointment
From	Alissa Kolodzinski, City Recorder
Contact	alissa.kolodzinski@ashland.or.us

SUMMARY

Approval of Mayor Graham's recommendation for the appointment of Catherine Greenspan to Position #7 to the Social Equity and Racial Justice Advisory Committee.

POLICIES, PLANS & GOALS SUPPORTED

Per the Ashland Municipal Code 2.04.090, all regular advisory committees and boards shall be appointed by the Mayor with the consent of the Council.

BACKGROUND AND ADDITIONAL INFORMATION

FISCAL IMPACTS

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move to approve the appointment of Catherine Greenspan to Position #7 to the Social Equity and Racial Justice Advisory Committee.

REFERENCES & ATTACHMENTS

1. SERJ Application_Greenspan_Redacted



From: noreply@civicplus.com
To: [Ashland City Recorder](#); [Ashland City Recorder](#); [Dorinda Cottle](#); [Dorinda Cottle](#)
Subject: Online Form Submittal: Appointment Application for City Committee or Commission
Date: Saturday, November 02, 2024 8:13:09 PM

[EXTERNAL SENDER]

Appointment Application for City Committee or Commission

Name	Catherine Greenspan
Committee or Commission You Wish to Serve On	Social Equity and Racial Justice Advisory Committee
Address	[REDACTED]
Phone	[REDACTED]
Email	[REDACTED]
Occupation	Financial Advisor, Publisher, Author
Educational Background	MA Writing, University of San Francisco BA English, University of Michigan
Related Experience	Personally: I am biracial and I see a need in Ashland for more inclusivity and education around diversity, equity, inclusion, and social justice. I am the author of a young adult book series about a biracial protagonist. Professionally: The publishing company I co-founded with my sister focuses on promoting diverse voices.
Interests	I believe in Ashland's potential and would love to support the efforts by being on this committee. Thank you for your consideration.
Availability	Yes. Afternoon or evening would be best.
Additional Information	5 years.
Upload Your File	<i>Field not completed.</i>
Signature	Catherine M Greenspan

Email not displaying correctly? [View it in your browser.](#)



Council Business Meeting

Date: December 3, 2024

Agenda Item	Housing and Human Services Advisory Committee Appointment
From	Alissa Kolodzinski, City Recorder
Contact	alissa.kolodzinski@ashland.or.us

SUMMARY

Approval of Mayor Graham's recommendation for the appointment of James Dykstra to Position #8 to the Housing and Human Services Advisory Committee.

POLICIES, PLANS & GOALS SUPPORTED

Per the Ashland Municipal Code 2.04.090, all regular advisory committees and boards shall be appointed by the Mayor with the consent of the Council.

BACKGROUND AND ADDITIONAL INFORMATION

FISCAL IMPACTS

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move to approve the appointment of James Dykstra to Position #8 on the Housing and Human Services Advisory Committee.

REFERENCES & ATTACHMENTS

1. Appointment Application HHSC Dykstra_Redacted



From: noreply@civicplus.com
To: [Ashland City Recorder](#); [Ashland City Recorder](#); [Dorinda Cottle](#); [Dorinda Cottle](#)
Subject: Online Form Submittal: Appointment Application for City Committee or Commission
Date: Tuesday, October 01, 2024 10:17:28 AM

[EXTERNAL SENDER]

Appointment Application for City Committee or Commission

Name	James Dykstra
Committee or Commission You Wish to Serve On	Housing and Human Service Advisory Committee
Address	[REDACTED]
Phone	[REDACTED]
Email	[REDACTED]
Occupation	Retired
Educational Background	Completed High school Livermore California, attended Tarrant County College Fort Worth Tx.
Related Experience	I'm Vice President for Pavilion Condominium Association at Mountain Meadows. I'm secretary for our of Parkview Homeowners Assoc. I'm retired from a 40 year career as Regional Sales Manager in retail I am a licensed Tax Preparer I've lived in Ashland for 35 years I was in the AirForce from 1972-1976 I would always be interested in additional training and learning.
Interests	Ashland for 35 years and It's important to me that we as a city find the best way to support our residents to make Ashland accessible to all.
Availability	Yes. I am retired so I have fairly flexible availability
Additional Information	We moved our family here in 1889. Our kids grew up here and my daughter and her family are still a part of this community. I have seen our city through many changes and I would like do my part in ensuring all have access to affordable housing so our city can continue to grow and be a wonderful community for families
Signature	James Donald Dykstra Jr

Email not displaying correctly? [View it in your browser.](#)



Council Business Meeting

Date: December 3, 2024

Agenda Item	ORDINANCE 3253 An ordinance amending AMC Section 10.120.010 Enhanced Law Enforcement Area and Persistent Violation to add a CAP East.
From	Tighe O'Meara, Police Chief
Contact	tighe.omeara@ashland.or.us

SUMMARY

Staff is coming before Council with a proposed new Enhanced Law Enforcement Area (ELEA).

POLICIES, PLANS & GOALS SUPPORTED

NA

BACKGROUND AND ADDITIONAL INFORMATION

In 2012 Council approved an Enhanced Law Enforcement Area (ELEA) in the downtown area. This was due to the fact that the community was seeing the same people chronically commit violations of city ordinances and state laws with little repercussions. The application of this ordinance has been effective in mitigating negative behavior in the downtown area in recent years, leading to the lowest number of complaints since 2017.

Staff is asking Council to approve an ordinance applying the same tool to a new ELEA along the Ashland Street business corridor between Siskiyou BL and the exit 14 area, to include the light industrial areas on Washington, Jefferson and Independent Way. In recent years the community has seen a steady rise in negative behavior along this business corridor, as seen in recently presented data. Currently available enforcement tools do not appear to be working, and staff believe applying the same framework to this area (CAP East) will help mitigate the negative behavior, as it did in the downtown area (CAP West).

FISCAL IMPACTS

None

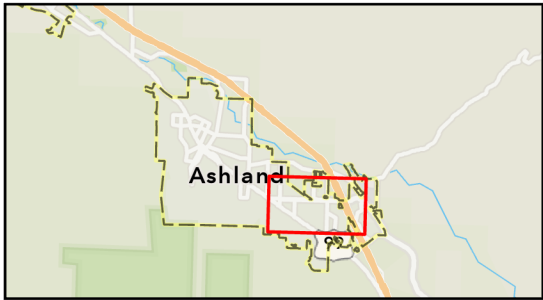
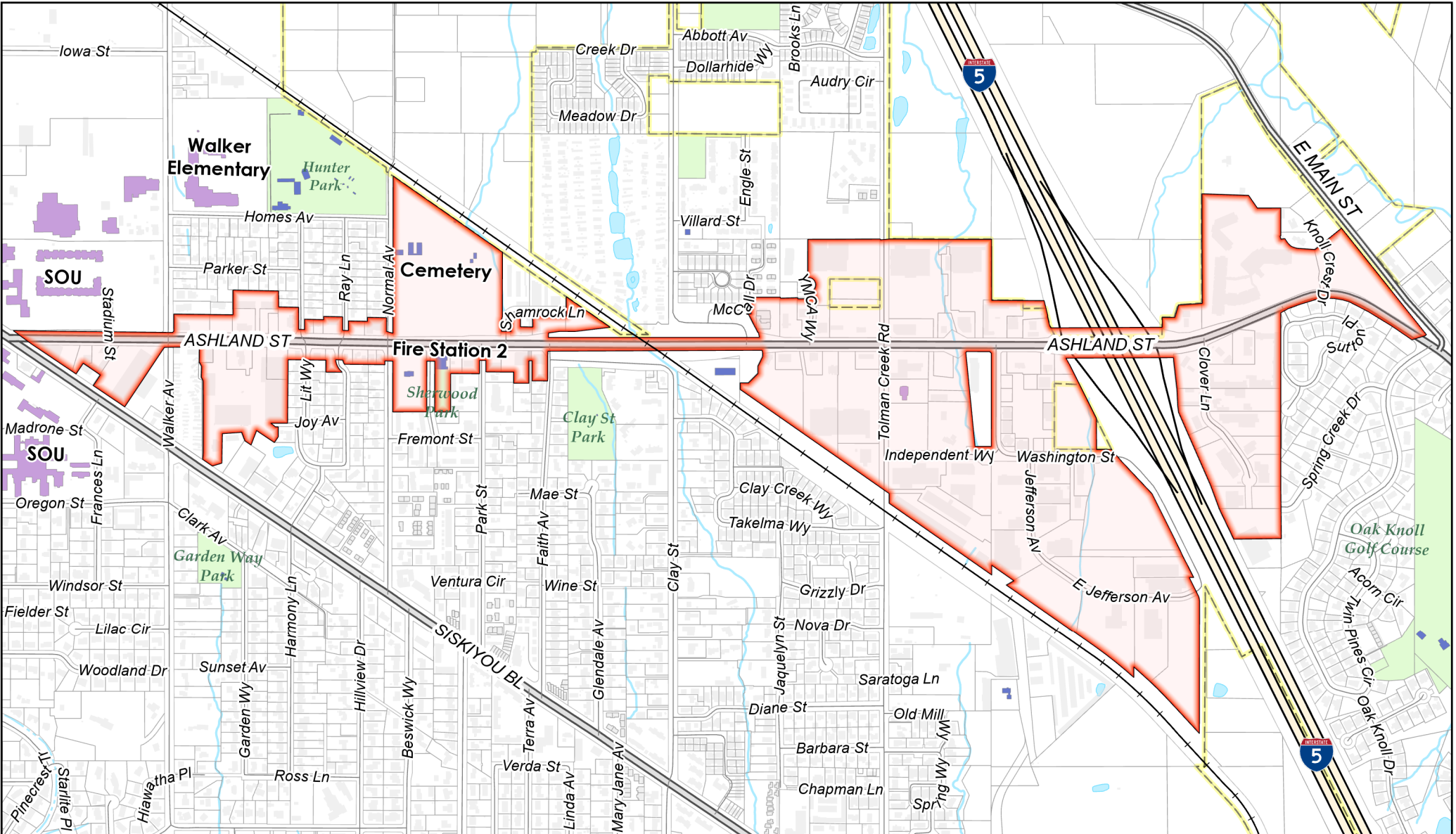
SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move to approve the application of the current Enhanced Law Enforcement Area ordinance to the proposed area referred to as CAP East.

REFERENCES & ATTACHMENTS

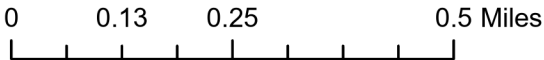
1. EAST CAP
2. ORD 3253 Amending AMC 10.120 Persistent Violations





CAP East Enhanced Law Enforcement Area

 CAP East Enhanced Law Enforcement Area



ORDINANCE NO. 3253

AN ORDINANCE AMENDING AMC SECTION 10.120 ENHANCED LAW ENFORCEMENT AREA AND PERSISTENT VIOLATION TO ADD A CAP EAST”

Annotated to show deletions and additions to the Ashland Municipal Code sections being modified. Deletions are ~~bold lined through~~, and additions are **bold underlined**.

THE PEOPLE OF THE CITY OF ASHLAND DO ORDAIN AS FOLLOWS:

SECTION 1.

10.120.010 Enhanced Law Enforcement Area and Persistent Violation, Misdemeanor

A. It is the intent of the City Council to protect discrete areas within the City that are experiencing increased unlawful activity against becoming an attraction for more such activity and to protect the public against health and welfare hazards posed by persons who are attracted to these areas for opportunity to engage in or to contact others to engage in unlawful activity.

B. The City Council finds that the following geographic areas within the City are particularly affected by unlawful behavior and/or are subject to a disproportionate number of incidents of the unlawful activities comprising persistent violation as defined in AMC 10.120.020 below, and declares each such area to be an enhanced law enforcement areas:

1. Downtown Enhanced Law Enforcement Area – inclusive of Bill Patton Garden and 130 N. Pioneer Street public parking lot, as depicted in Exhibit A attached to the ordinance codified in this section.

2. Concentrated Area Patrol (CAP) East, as depicted in Exhibit B.

10.120.020 A Person Commits the Crime of Persistent Violation If:

A. The person is convicted in Ashland Municipal Court for any combination of the following crimes or violations occurring in separate incidents within a six-month period within an enhanced law enforcement area:

1. Three (3) or more Class A, B or C felonies or Class A, B or C misdemeanors;
2. Two (2) Class A, B or C felonies or Class A, B, or C misdemeanors plus one (1) or more violations of the sections set forth below;
3. Three (3) or more violations of any of the following sections or laws:
 - a. AMC 9.08.110 – Scattering Rubbish;
 - b. AMC 9.08.170 – Unnecessary Noise;
 - c. AMC 9.16.010 – Dogs – Control Required;
 - d. AMC 10.40.030 – Consumption of alcoholic liquors in public places prohibited; or
 - e. AMC 10.40.040 – Open Containers Prohibited;
 - f. AMC 9.16.015 – Dog License Required; or

g. ORS 475B.381 – Use of marijuana in public place prohibited.

B. The person knowingly enters an enhanced law enforcement area in violation of a Municipal Court expulsion order as a term of the person’s probation or a court expulsion order pursuant to AMC 10.125.010 et seq. (Ord. 3142, amended, 04/18/2017; Ord. 3113, amended, 2015; Ord. 3066, added, 06/19/2012)

10.120.030 Mandatory Arrest

A. When a peace officer has probable cause to believe that a person has committed the crime of persistent violation, the officer shall arrest and take into custody the alleged violator.

10.120.040 Misdemeanor Classification Presumptive Penalty

A. Persistent Violation is a Class B Misdemeanor.

B. Unless there is reasonable cause to order otherwise, upon a finding that any offense supporting a conviction for persistent violation occurred within an enhanced law enforcement area, in addition to any other appropriate conditions of probation, the Court shall expel the person from an enhanced law enforcement area defined in AMC 10.120.010.B for a period not less than three (3) months or more than one (1) year, unless the court finds it necessary to:

1. Specifically address the remedy for the violation; and/or
2. Allow the person to travel to and from the person’s place of employment, educational facility, City offices, physical or mental health treatment facility, or other areas that the court deems materially related to the person’s crimes or violations, the needs of the person, or the protection of the public.

SECTION 5. Severability. Each section of this ordinance, and any part thereof, is severable, and if any part of this ordinance is held invalid by a court of competent jurisdiction, the remainder of this ordinance shall remain in full force and effect.

SECTION 6. Codification. Provisions of this Ordinance shall be incorporated in the City Code and the word “ordinance” may be changed to “code”, “article”, “section”, “chapter” or another word, and the sections of this Ordinance may be renumbered, or re-lettered, provided however that any Whereas clauses and boilerplate provisions (i.e. Sections 3-5) need not be codified and the City Recorder is authorized to correct any cross-references and any typographical errors.

The foregoing ordinance was first read by title only in accordance with Article X, Section 2(C) of the City Charter on the _____ day of _____, 2024, and duly PASSED and ADOPTED this _____ day of _____, 2024.

PASSED by the City Council this _____ day of _____, 2024.

ATTEST:

Alissa Kolodzinski, City Recorder

SIGNED and APPROVED this _____ day of _____, 2024.

Tonya Graham, Mayor

Reviewed as to form:

Douglas M. McGearry, Acting City Attorney



Council Business Meeting

Date: December 3, 2024

Agenda Item	Second Reading - ORD 3244 Amending AMC 2.10 to Establish Uniform Policies and Operating Procedures for Advisory Committees and Commissions
From	Doug McGeary, City Attorney, Acting
Contact	doug.mcgeary@ashland.or.us

SUMMARY

The ordinance passed First Reading during the November 19, 2024 meeting. It will ensure that the City's advisory bodies are aligned with strategic goals, fostering transparency and accountability while avoiding the historical challenges posed by the expansion of commissions with overlapping roles and authority. By codifying the committee structure and terminating the old commissions, the City will have a more efficient and cohesive advisory system.

POLICIES, PLANS & GOALS SUPPORTED

This ordinance supports the city's goals of transparency and accountability by ensuring open governance and public access to committee operations. It promotes community engagement and diversity by facilitating inclusive participation and equitable representation on advisory committees. Additionally, it enhances effective governance and strategic planning by clarifying roles and responsibilities, ensuring ethical standards, and aligning committee recommendations with city priorities.

BACKGROUND AND ADDITIONAL INFORMATION

The City of Ashland has a long-standing tradition of citizen involvement through advisory bodies. With the successful implementation of the committee structure established under Resolution 2023-06, which updated and consolidated Resolutions 2022-24 and 2022-32, the City has experienced enhanced community participation and effective advisory input. To build on this success, this ordinance codifies the structure and operations of advisory committees, providing clear guidelines for roles, responsibilities, and procedures. This codification will also align committee activities with the City's strategic goals, ensuring transparency, accountability, and inclusivity.

This ordinance, establishing AMC 2.10, is designed to work in tandem with a possible future ordinance or resolution that will codify the City's previous resolution that moved from a commission-based structure to a committee-based structure. The ordinance establishing AMC 2.10 sets forth uniform policies and operating procedures for City Council Standing Advisory Committees and regular temporary advisory committees, providing clear guidelines for the formation, operation, and responsibilities of advisory committees. The Planning Commission, Municipal Audit Commission, and Budget Committee, and the Ashland Parks and Recreation Commission (AP&RC) (together referred to as "Commissions") are governed by state law or Charter, and while they are subject to specific rules and procedures in their relative authorizing legislation, these rules outlined in this ordinance are suggested for their operation where possible.

A future ordinance would formally terminate the commissions that are currently set out in City ordinances. It is possible to utilize this future ordinance or alternatively a resolution to replace these commissions with the committee structures established under previous resolutions, such as Resolution 2023-06. This transition is part of the City's broader effort to streamline and modernize its advisory body framework, ensuring that all committees, whether new or existing, operate under the clear and consistent rules outlined in AMC 2.10.

FISCAL IMPACTS

None

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

Recommended Motion:



Council Business Meeting

- I move to approve Second Reading of Ordinance #3244, "An Ordinance Amending AMC 2.10 to Establish Uniform Policies and Operating Procedures for Advisory Committees and Commissions".

REFERENCES & ATTACHMENTS

1. ORD 3244 Amending AMC 2.10_Second Reading



ORDINANCE NO. 3244

AN ORDINANCE AMENDING AMC 2.10 TO ESTABLISH UNIFORM POLICIES AND OPERATING PROCEDURES FOR ADVISORY COMMITTEES AND COMMISSIONS

Annotated to show deletions and additions to the Ashland Municipal Code sections being modified. Deletions are ~~bold lined through~~, and additions are **bold underlined**.

WHEREAS Article 2. Section 1 of the Ashland City Charter provides:

Powers of the City. The City shall have all powers which the constitutions, statutes, and common law of the United States and of this State expressly or impliedly grant or allow municipalities, as fully as though this Charter specifically enumerated each of those powers, as well as all powers not inconsistent with the foregoing; and, in addition thereto, shall possess all powers hereinafter specifically granted. All the authority thereof shall have perpetual succession.

WHEREAS the City of Ashland seeks to enhance the productivity and fairness of its advisory bodies through clear and consistent rules, policies, and operating procedures; and

WHEREAS the current Ashland Municipal Code (AMC) Chapter 2.10 provides uniform policies and operating procedures for advisory commissions and boards, but does not fully address the needs and functions of advisory committees established by the City Council and City Management; and

WHEREAS advisory committees serve solely as advisory bodies and play a critical role in providing recommendations and advice to the City Council and City Management on various matters of public interest and administrative functions; and

WHEREAS the City recognizes the need to update and integrate policies and procedures to reflect the specific roles and responsibilities of advisory committees, while maintaining the distinct statutory rules for the Planning Commission, the Budget Committee, the Municipal Audit Commission, and the City Charter in the case of the Parks and Recreation Commission; and

WHEREAS the updated ordinance will provide clarity on the establishment, appointment, meeting procedures, and ethical standards for advisory committees, thereby promoting transparency, accountability, and inclusivity; and

WHEREAS the new provisions ensure that advisory committees operate without executive, administrative, or enforcement authority, thereby maintaining their advisory nature and preventing conflicts with City departments and other government agencies; and

WHEREAS the ordinance includes provisions for annual orientation and training for committee members, enhancing their effectiveness and understanding of their roles and responsibilities; and

WHEREAS the ordinance emphasizes diversity, equity, and inclusion, ensuring that advisory committees reflect the diverse populations within the City and that information about vacancies and the application process is readily accessible; and

WHEREAS the updated ordinance allows advisory committees to consult with other city advisory committees on matters of mutual interest, fostering collaboration and coordinated efforts across different advisory bodies; and

WHEREAS the ordinance includes clear guidelines on the voluntary nature of testimony requested by advisory committees, safeguarding the rights of individuals and organizations; and

WHEREAS the City Council finds that the updated and integrated policies and procedures will better serve the needs of the City and its residents by ensuring the efficient and effective operation of advisory committees;

NOW, THEREFORE, THE CITY OF ASHLAND ORDAINS AS FOLLOWS:

SECTION 1. Ashland Municipal Code Chapter 210 UNIFORM POLICIES AND OPERATING PROCEDURES FOR ADVISORY COMMISSIONS AND BOARDS will be amended by replacing the existing language with the following:

A. Chapter 210 UNIFORM POLICIES AND OPERATING PROCEDURES FOR ADVISORY COMMITTEES AND COMMISSIONS

2.10.005 PURPOSE Advisory committees require uniform rules, policies, and operating procedures to ensure maximum productivity and fairness for members and the public. These policies and procedures are applicable to and govern all City Council Standing Advisory Committees and ad hoc, task force, joint committees, and other type committees that the Council might create. The formation and functions of the Planning Commission, Municipal Audit Commission, and Budget Committee, and the Ashland Parks and Recreation Commission (AP&RC) (together referred to as “Commissions”) are governed by state law or Charter, and while they are subject to specific rules and procedures in their relative authorizing legislation, these rules outlined in this ordinance are suggested for their operation where possible, except as to AMC 2.10.030 - .035, and AMC 2.10.060 - .065, which are mandatory.

2.10.010 ESTABLISHMENT Advisory committees (or commissions if so named and not otherwise referenced in this ordinance) are established to serve solely as advisory bodies whose actions or recommendations shall not be considered as City policy or as final decisions of the City. They have no executive, administrative, civil rights investigatory, or enforcement authority. Committees are divided into:

- **Standing Advisory Committees: Ongoing committees with long-term responsibilities;**
- **Advisory Committees include ad hoc, task force, joint committees, and other type committees that are formed according to immediate or temporary need; and**

- Management Advisory Committees: Committees formed to provide advice to City Management on specific administrative functions and are regulated separately from this ordinance.

2.10.015 Appointment and Terms

A. Appointment of Members:

1. Members of any type advisory committee will be appointed by the Mayor with the consent of the City Council.

2. Voting and alternate standing advisory committee members will be comprised of individuals who reside within the City, except one (1) member from each advisory committee may be an at-large member living within the City's urban growth boundary.

a. Unless otherwise provided, all nonvoting ex-officio members are not required to be residents within the City or the urban growth boundary.

3. Each committee may include members under 18 years of age, but no more than two members under 18 may serve on the committee at the same time.

4. No individual may serve as a voting member on more than two Standing Committees simultaneously.

5. Members of any committee serve as individuals exercising their own best judgment, not as delegates for their respective organizations.

B. Term Limits:

1. The term for the Chair or Co-Chair of a Standing Advisory Committee shall be one (1) year. A Chair or Co-Chair may serve multiple terms, but no more than two consecutive terms as either Chair or Co-Chair in their respective role.

2. Standing Advisory Committee members may serve no longer than eight (8) years in total on any single committee. After serving the maximum term, a member must step down and may not be reappointed to the same committee for at least two (2) years. If the member wishes to serve on a different committee, no break is required.

3. Transition terms for Standing Advisory Committee members shall commence on January 1 to align with the calendar year.

C. Age Requirement: Members under 18 may serve on any committee, but they are not eligible to vote or be counted towards the quorum until reaching the age of 18.

D. Non-Voting Members Council liaisons, and ex-officio members of any advisory committees shall serve as non-voting members and shall not be counted toward the quorum.

E. Staggered Terms and Vacancies: When new members are appointed to fill vacancies or staggered terms, the initial term length may vary to ensure that no more than one-third of committee members' terms expire in the same year.

2.10.020 MEETINGS AND ATTENDANCE

A. Advisory committees will follow meeting and attendance rules consistent with AMC 2.10, including attendance requirements of at least 75% of meetings. Members should provide at least 48-hour notice for planned absences.

B. A quorum consists of more than half of the total number of current Council-confirmed voting members but no fewer than three members. Members may attend open public meetings via electronic communication means, provided public meeting law requirements are met.

C. The Planning Commission, Budget Committee, Municipal Audit Commission and AP&RC shall set their own meeting attendance requirements.

2.10.025 REMOVAL AND VACANCIES Members may be removed and vacancies filled as provided in above section, 2.10.015(E), and AMC 2.04.090(C) and (F).

2.10.030 PUBLIC MEETING LAW All meetings are subject to the public meeting laws of the State of Oregon. Notice must be provided at least 36 hours in advance, except in emergencies.

2.10.035 ROLE OF STAFF The City Manager will assign City staff to support the work of the advisory committees and provide at least an annual orientation or training session. Staff liaisons provide professional guidance, continuity, and insight into City policy, and they attend all regular and special meetings and workshops.

Staff time usage must be directly related to supporting the committee's work as defined by the Council/ AP&RC approved scope and objectives of the committee. Committees have flexibility in their work within these defined objectives. However, the committee may not direct staff to undertake work outside of this scope without prior concurrence from the committee's assigned Council/ AP&RC liaison and the Mayor/ AP&RC Chair. If a committee seeks to assign additional work to staff beyond its established purpose, the committee must first secure the agreement of the Council/AP&RC liaison and confirm that the additional staff work will not exceed two (2) hours, including policy research and document drafting. Any request for additional work beyond this limit must be approved by the full Council.

2.10.040 COUNCIL LIAISON Council liaisons will be appointed to each advisory committee as non-voting ex-officio members.

2.10.045 AGENDAS AND MINUTES The chair or staff liaison is responsible for preparing agendas and minutes. Staff liaisons will be responsible for posting meeting agendas,

minutes, and other relevant business or information to the City website to ensure accessibility and transparency for the public.

2.10.050 GOALS AND REPORTS Standing Advisory Committees will establish annual goals and action items with feedback from the City Council. These goals and action items should align with the City's strategic priorities and be reviewed periodically to ensure progress and relevance. Committees must submit annual reports on their activities and accomplishments to the City Council.

2.10.055 QUORUM AND VOTING A quorum is necessary for adopting any motion.

2.10.060 CODE OF ETHICS All advisory committee and Commission members must adhere to the highest ethical standards, serving the community as a whole and operating in the public interest.

2.10.065 DIVERSITY, EQUITY, AND INCLUSION Efforts will be made to ensure diverse representation within all committees and Commissions. Information on vacancies and the application process will be readily available to all residents.

2.10.070 RULES AND REGULATIONS Any advisory committee may adopt additional rules and regulations consistent with City policies as necessary to fulfill their purpose and responsibilities. Any such rules and regulations must be approved by the City Council or City Manager to ensure alignment with the standardized procedures established in this chapter.

1. Failure to strictly comply with the rules on meeting procedure shall not be a cause to void or otherwise disturb a decision or action. The body will strive to be clear in its proceedings.

2.10.075 CONSULTATION AND COORDINATION Advisory committees may consult with other city advisory committees on matters of mutual interest. Chairpersons are responsible for coordinating activities between committees.

2.10.080 LOBBYING AND REPRESENTING THE CITY Members of any advisory committee or Commission are prohibited from engaging in political activity in their capacity as members of their respective body, in accordance with ORS 260.432, which governs public employees. This includes advocating for or against ballot measures, candidates, or political campaigns using city resources or while acting in an official capacity on behalf of the committee.

Members must secure permission from the body before speaking publicly on behalf of the body or presenting any official position of the body to external audiences. This restriction does not prevent members from speaking as private individuals, provided they do not imply that they are representing the body or the City in such communications.

2.10.085 TESTIMONY Advisory committees may request voluntary testimony but may not compel an individual or organization to appear before it or respond to questions.

2.10.090 MEMBER RESPONSIBILITIES Advisory committee members shall serve as individuals exercising their own best judgment and not as delegates for their respective organizations or groups. Committees and their members are not official representatives of the City and may not present their committees' recommendations or their personal opinions or points of view as representative of the City's policy or operational perspectives. Prior to speaking publicly on behalf of their respective advisory committee, members must secure the permission of their committee to represent the activities or recommendations of their committee.

SECTION 2. ADOPTION OF AMENDMENTS The City Attorney is directed to update the Ashland Municipal Code to reflect the establishment of these advisory committees and their procedures.

SECTION 3. Codification. Provisions of this Ordinance shall be incorporated in the City Code, and the word “ordinance” may be changed to “code”, “article”, “section”, or another word, and the sections of this Ordinance may be renumbered or re-lettered, provided however, that any Whereas clauses and boilerplate provisions (i.e., Sections [No(s.)] need not be codified, and the City Recorder is authorized to correct any cross-references and any typographical errors.

The foregoing ordinance was first ready by title only in accordance with Article X, Section 2(C) of the City Charter on the _____ day of _____, 2024, and duly PASSED and ADOPTED this _____ day of _____, 2024.

SIGNED and APPROVED this _____ day of _____, 2024.

Tonya Graham, Mayor

ATTEST:

Alissa Kolodzinski, City Recorder

Reviewed as to form:

Douglas M. McGeary
Acting City Attorney



Council Business Meeting

Date: December 3, 2024

Agenda Item	USDA RESP Loan Update and Program Roll-Out Plan
From	Chad Woodward, Climate and Energy Analyst, Mariane Berry, Finance Director
Contact	chad.woodward@ashland.or.us, mariane.berry@ashland.or.us

SUMMARY

Staff is presenting to Council an update on the USDA loan and the related Rural Energy Savings Program, or RESP, a US Government program that works to provide loans to customers for the purpose of implementing "Energy Efficiency Measures". The loan administrator of RESP is the Rural Utilities Service (RUS), which is part of the USDA.

This is a \$10 million zero-percent pass-through loan over the course of a 20-year term that the City of Ashland refers to as its "On-Bill Financing Program". The purpose of this program is to increase access to financing and promote investment in energy efficiency and renewable energy by providing affordable loans that a customer can repay on their monthly electric bill.

POLICIES, PLANS & GOALS SUPPORTED

Vision Statement:

"We will continue to be a unique and caring city that stresses environmental conservation"

Administrative/Governance Goal:

"Environmental resilience, including addressing climate change"

"Sustainability through creativity, affordability, and rightsized service delivery"

CEAP Goals Supported:

- Overall Goal 1. Reduce Community GHG Emissions.

CEAP Strategies Supported:

- Strategy BE-1. Support cleaner energy sources
- BE-1-2. Promote switching to low and non-carbon fuels.
- BE-1-3. Facilitate and encourage solar energy production.
- Strategy BE-2. Encourage increased building energy efficiency and conservation.
- BE-2-1. Expand participation in energy efficiency programs & promote climate-friendly building/construction.
- BE-2-3. Identify and adopt strategies to reduce energy efficiency barriers in rent/lease properties.

Supports City of Ashland conservation and sustainability programs:

- Comprehensive Plan – Housing Element 6.08. Environmental stewardship and sustainability.
- Housing Element 6.10 - Policy 20: Promote building and site design that supports energy efficiency, renewable energy generation, and water conservation in new residential developments.

BACKGROUND AND ADDITIONAL INFORMATION



Council Business Meeting

Previous action by Council - On June 15, 2021, Council approved Resolution 2021-15 Establishing the On-Bill Financing Program (see attached). Since then, staff has worked with the USDA Office of Loan Origination and Approval to provide the necessary financial documents to them for approval under the program. USDA provided their approval on September 22, 2023 informing City of Ashland of their loan commitment in the amount of \$10,000,000.

Financing Background - In July 2024, the attorneys for RUS requested that the City retain bond counsel to provide an opinion on the debt and borrowing capacity of the City. The City's bond counsel is Hawkins Delafield & Wood LLP and its financial advisor is PFM Financial Advisors LLC. Bond Counsel has advised the City that there are two Oregon statutes that authorize the borrowing: ORS 287A.150 and ORS 271.390. The former, ORS 287A.150, is a resolution that requires a referral period and provides for the ability to refer the authority to a vote. The latter, ORS 271.390, has other requirements, namely that the contract is for 1) financing real or personal property, 2) that Council finds the property (energy efficiency measures) needed, and 3) that it meets the weighted average maturity requirements.

Bond Counsel also advised that there is a Lending of Credit issue that comes into play should the City pledge its full faith and credit to the financing – municipalities are prohibited from pledging its general fund to back a loan to a company. While it was always the intention to have Ashland Electric hold the borrowing, RUS had approved the loan commitment based on the full faith and credit of the City of Ashland. In October 2024, RUS subsequently approved the use of security in the form of a first priority lien on the electric system revenues.

Finance Staff will present this update to Council, request guidance on the authority Council chooses to use for this borrowing in order to prepare the resolution and other loan documentation and provide an expected timeline for closing of the loan.

Program Roll-Out Update – Conservation staff has been working on the RESP loan over the past year. Over the past year staff has built up a roll-out framework, acquired templates and sought feedback from multiple sources, including other RESP participants, non-profit advisors and the Climate and Policy Advisory Committee (CEPAC). In the next few months, staff will be reviewing templates and drafting documents to enable a program roll-out in Spring 2025.

There are three major portions to the RESP loan program implementation. First, there is the foundational work of creating loan documents within the confines of applicable Oregon municipal laws. This will be the first RESP loan to a municipally owned utility in Oregon. Second, is the backend planning, preparation and program budgeting. The planning is complex and includes the creation of multiple sets of forms, letters, procedures, spreadsheets and an integrative Accounting structure set-up. Additionally, it requires recruitment and training of contractors to participate and promote the program. Staff from Conservation and Finance will continue to work collaboratively to ensure proper set-up of the framework for this program and compliance with related laws and the loan agreement. This process will be discussed in more detail in the council presentation where we walk through what happens from a staff perspective and a loan customer perspective.

The process will require creating over 15 different documents to support various stages of the process, marketing materials, multiple forms for data collection and analysis and at least one training for contractors. Many of these documents will require legal review. The next four months will see these plans move to a functioning program.

The presentation will cover a summary of the roll-out plan which will include:

- Hire Staff
- Contractor Recruitment
- Contractor Manual
- Contractor Training
- Accounting Set-up and Finance Procedures
- Application materials
- Loan Agreement materials
- Closing materials



Council Business Meeting

- Enforcement mechanisms
- Program Tracking
- Multiple articles in city newsletter
- Press release upon launch
- Website Development
- Financial & Performance Reports two/year
- Other Considerations: LMI & Rentals

FISCAL IMPACTS

Use of earmarked Conservation funds from the 23-25 biennial budget shall be prioritized to successfully launch the RESP loan program.

Currently \$950K is committed in the current budget towards Conservation initiatives. Since the borrowing authority of the RESP loan prohibits the City from using the RUS Special Advance towards start up costs that are non-real or non-personal property related, Staff recommends the partial use of Conservation funds to launch the program in a timely manner. Staff requests up to \$200K be allocated from the Conservation funds towards a new staff person and marketing/administrative costs. It is anticipated that the program will be self-sufficient within a 12 to 18 month timeframe.

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

REFERENCES & ATTACHMENTS

1. 061521_On-Bill Financing RESP Resolution_CCFinal
2. ORS 287A.150
3. ORS 271.390



Council Business Meeting

June 15, 2021

Agenda Item	Resolution No. 2021-15 Establishing the On-Bill Financing Program	
From	Stu Green	Climate and Energy Analyst
Contact	Stu.Green@ashland.or.us ; 541-552-2085	

SUMMARY

The Council is asked to adopt a Resolution establishing the On-Bill Financing Program. Formally establishing this program by resolution is a requirement that will allow Ashland Electric staff to apply for a zero-interest Federal loan. The loan will be used to capitalize a \$10 million program designed to fund ratepayer energy efficiency and renewable energy projects. If created, this program will enable significant reductions in greenhouse gas emissions and will contribute to a more resilient Ashland.

POLICIES, PLANS & GOALS SUPPORTED

The On-Bill Financing Program supports Ashland's Climate Action Goals to reduce greenhouse gasses, increase resilience, and make wise use of resources. The On-Bill Financing Program aligns with implementation strategies adopted in Ashland's 2017 Climate and Energy Action Plan.

CEAP Goals Supported

Overall Goal 1. Reduce Community GHG Emissions.

Overall Goal 2. Prepare Ashland to be more resilient to climate change.

Goal BE 1. Reduce GHG emissions associated with Ashland's building energy use.

Goal BE 2. Increase energy and water efficiency in City and Private buildings.

Goal BE 3. Protect Ashland's building stock and energy supply from climate impacts.

Goal ULT 1. Reduce transportation GHG emissions.

Goal ULT 4. Support local and regional sustainable growth.

Goal CC 2. Integrate climate change considerations into day-to-day City operations, planning, and decision making.

Goal PHSW 1. Protect public health from air pollution and climate impacts.

CEAP Strategies Supported

Strategy BE-1. Support cleaner energy sources.

Strategy BE-2. Encourage increased building energy efficiency and conservation

Strategy ULT-3. Support more-efficient vehicles

Strategy CC-4. Engage with other governments and organizations around regional, statewide, national, and international climate policy and action.

CEAP Actions Supported

Action BE-1-2. Promote switching to low and non-carbon fuels.

Action BE-2-1. Increase outreach efforts to expand participation in energy efficiency programs and promote climate-friendly building and construction.

Action BE-1-3. Facilitate and encourage solar energy production.

Action BE-2-3. Identify and adopt strategies to reduce energy efficiency barriers in rent/lease properties.

Action BE-5-1. Encourage heat-tolerant building approaches such as cool roofs and passive cooling.

PREVIOUS COUNCIL ACTION

NA

BACKGROUND AND ADDITIONAL INFORMATION

High up-front costs and lack of access to financing are significant barriers to investing in energy efficiency and renewable energy improvements. The purpose of this program is to increase access to financing and promote investment in energy efficiency and renewable energy by providing affordable loans that customers can repay on their monthly electric bills.

Ashland Electric has been invited to apply for a \$10 Million, zero percent interest, 20-year loan designed to support rural utility energy savings. This is an unmatched opportunity to access Federal funds from the United States Department of Agriculture (USDA) to make existing buildings more efficient. Rural Energy Savings Program (RESP) funding would be used to capitalize the newly created On-Bill Financing Program.

The On-Bill Financing program is designed to provide easy, affordable loans to building owners for approved energy efficiency and renewable energy improvements. Customers pay back the loan through a charge on their utility bills. The loan repayment is considered part of the charges for electric services to the property. The On-Bill Financing program will lend utility customers up to \$30,000 to implement approved energy efficiency and renewable energy measures. Loans to ratepayers will offer a low, fixed-interest rate.

The On-Bill Financing program will allow building owners to voluntarily complete significant energy upgrades with minimal upfront cost. Ashland's program builds on the successful framework of other rural utilities' on-bill financing programs that have leveraged RESP funding.

The USDA application includes numerous boiler-plate documents intended to be filled out by entities applying for Federal funding. Staff will complete these documents once City Council endorses the program concept.

Council approval of the attached resolution City of Ashland will enable staff to proceed with a formal application to the USDA Rural Energy Savings Program. Staff has invested considerable time in developing the attached On-Bill Financing Program, which accurately reflects the program that will be presented in the USDA application. Ashland Electric and City Council will have opportunities to fine tune the program in the future.

Additional program history

Upfront costs are a well-known barrier to building energy upgrades. Seeking to build on the historical success of Ashland's Conservation loan, staff have explored numerous program options over the years.

- In late 2017 staff drafted an expansion of the existing Conservation Loan program, but no City funding was available to expand the new program.
- In early 2018 staff consulted with local banks about funding, but interest rates were high enough that there was insufficient value proposition for ratepayers or the City.
- In Summer 2020 staff learned of additional funding opportunities available from USDA. Staff forwarded a letter of interest to USDA, along with the draft on-bill financing plan. In Fall 2020 staff received a message that funds had been allocated elsewhere, and Ashland would not receive funding for the program.
- In late 2020, staff worked with members of the Climate Policy Commission to re-tool the loan program again, this time shrinking the scope to match an extremely limited budget. CPC reviewed the program design in early 2021 and voiced support for creating the program.
- In early April 2021 staff was contacted by USDA again and invited to apply for newly available RESP funds. Staff have spent the past several weeks updating and refining the program to sufficiently meet USDA requirements. Utility staff were given 90 days to complete the formal application, which is due on July 6, 2021.

FISCAL IMPACTS

Detailed ten year financial forecasts are attached to this communication. This program would require the outsourcing of several aspects, likely including Program Administration and Loan Origination services. Some aspects of the program would be handled by existing staff resources, including collecting monthly payments on utility bills,

providing outreach, and offering financial incentives for specific upgrades (all three of these activities are services that City of Ashland already provides). Conservation Division may shift duties of some staff to adequately support this program during the 21/23 biennium, but no additional staff will be hired to support this program.

Any outsourced, new services will be paid by loan origination fees. Any increase in utility billing labor will be paid through the interest assessed to each loan. By design, the On-Bill financing program will cover its own costs.

STAFF RECOMMENDATION

Staff recommends approval of the resolution.

ACTIONS, OPTIONS & POTENTIAL MOTIONS

1. I move to approve Resolution No. 2021-14 to Create the On-Bill Financing Program.
2. I move to approve Resolution No. 2021-14 to Create the On-Bill Financing Program, and direct staff to provide a progress report to Council within <six to eight> months.
3. I move to not approve the Resolution to Create the On-Bill Financing Program.

REFERENCES & ATTACHMENTS

All of the attachments below are required for Utility staff to submit a formal application for RESP funds. The attachments in bold are the most relevant for understanding the On-Bill Financing program and enabling staff to take the next step. The un-bolded attachments are also vital to the application, but they are boiler-plate forms that are not specific to the design of the On-Bill Financing program.

Attachment 1: Formal Application for RESP Funds

- Cover Letter
- **Board Resolution**
- [City of Ashland Charter](#)
- RESP Multi-tier environmental agreement
 - RESP Multi-tier environmental agreement eligible activity environmental requirements
- **Long-term financial forecast Ashland Electric On-Bill Financing program**
- **On-Bill Financing Implementation Workplan**
- Staff Bios
- Attorney's Opinion Letter
- Form 400
- AD1049 form for Grantees Other Than Individuals
- AD 1047 Certification Regarding Debarment, Suspension, and Other Responsibility Matters
- Lobbying Certification
- Federal Debt Delinquency Certification



<Date> of Loan Application Board Meeting>

Rural Utilities Service, Electric Programs
U.S. Department of Agriculture
1400 Independence Avenue, S.W.
STOP 1560, Room 5138, South Building
Washington, D.C. 20250-1510
Attn: Mr. Christopher Mclean

Subject: Ashland Electric Rural Energy Savings Program (RESP) Loan Application
IRS Taxpayer ID # 93-6002117
DUNS# 076395508; SAM # 076395508 / 31KS2

Dear Mr. McLean:

We are forwarding for your consideration our completed Rural Energy Savings Program (RESP) loan application in the amount of \$10,000,000 along with a copy being forwarded to our RESP General Field Representative.

As required under the loan application checklist, the following are attached:

1. Application Cover Letter signed by highest ranking officer.
2. Signed Board Resolution approving the establishment of the program.
3. Articles of Incorporation and Bylaws or other applicable organizational documents.
4. Multi-Tier Action Environmental Compliance Agreement.
5. 10 Year Long Range Financial Forecast to include:
 - 5.1. Current and Projected cash flows
 - 5.2. Pro forma balance sheet
 - 5.3. Financial goals for margins, debt service, coverage, equity, etc.
 - 5.4. Assumptions, supporting data, analysis
 - 5.5. Current and projected income and expenses
 - 5.6. Itemized budget and schedule, discussion of loan loss reserve
 - 5.7. Sensitivity analysis if required by RUS
6. Implementation work plan.
7. Quality assurance procedures, including Measurement and Verification plan.
8. Additional Federal compliance forms as provided in NOSA
 - 8.1. Attorney's Opinion Letter
 - 8.2. Form 400
 - 8.3. Standard Form 100 (N/A if less than 100 full time employees).



- 8.4. Form AD-1049
- 8.5. Form AD-1047
- 8.6. Lobbying Certification
- 8.7. Certification on Federal Debt Delinquency

In addition to the items required under the loan application checklist, we further clarify the following items:

1. The loan application does not include funds to finance:
 - 1.1. The construction or acquisition of any building identified as located in a flood hazard area.
 - 1.2. b. New equipment, materials or supplies in any building identified as located in a flood hazard area.
2. All funds in this loan application will be used within the State of _____.
3. _____ serves the following counties in the state of _____:
 - 3.1. List Counties:
4. There are no threatened actions by third parties that could adversely affect our financial conditions.
5. There are no State of _____ regulatory proceedings pending against the Borrower.
6. _____ does or does not anticipate any changes in retail rates. Please describe last rate adjustment and when it took place.
7. The true and correct legal name of the borrower is _____.
8. The headquarters address of the borrower is _____.

Sincerely,

Name

Title of Highest Official

Ashland Municipal Electric Utility or City of Ashland



1 **RESOLUTION NO. 2021-15**

2 A RESOLUTION ESTABLISHING THE ON-BILL FINANCING PROGRAM

3 **RECITALS:**

4 **WHEREAS**, Ashland Electric has developed the On-Bill Financing Program for the rural areas
5 in our service territory intended to be funded with the proceeds from the United States
6 Department of Agriculture's Rural Energy Savings Program;

7 **WHEREAS**, Ashland Electric will offer the On-Bill Financing program to provide easy,
8 affordable loans to building owners for approved energy efficiency and renewable energy
9 improvements. Customers pay back the loan through a per-meter charge on their utility bill. The
10 loan payment is considered part of the charges for electric services to the property. The On-Bill
11 Financing program will lend utility customers up to \$30,000 to implement approved energy
12 efficiency and renewable energy measures.;

13 **WHEREAS**, Ashland Electric has developed a comprehensive implementation work plan and
14 financial forecast for On-Bill Financing Program;

15 **WHEREAS**, Ashland Electric has developed a comprehensive measurement and verification
16 program in connection with On-Bill Financing Program;

17 **WHEREAS**, the financial forecast, the implementation work plan and the measurement and
18 verification program, and related documents will be considered by the Rural Utilities Service, an
19 agency of the United States Department of Agriculture, in making a determination to make a
20 financially feasible and adequately secure loan to Ashland Electric;

21 **WHEREAS**, Ashland Electric intends to submit a loan application under the Rural Energy
22 Savings Program Loan as prescribed in the Rules and Regulations published in the Federal
23 Register, Vol. 85, No. 64 on April 2, 2020;

24 **NOW THEREFORE BE IT RESOLVED**, that Ashland Electric approves the implementation
25 work plan, the financial forecast and related documents in connection to the On-Bill Financing
26 Program,

27 **BE IT ALSO RESOLVED**, that Ashland Electric's officers, managers, and staff are authorized
28 to carry out all necessary actions –including but not limited to the executing and attesting all
29 necessary documentation- in connection with the loan application to participate in the Rural
30 Energy Savings Program as provided in the NOSA;

1 **BE IT FURTHER RESOLVED** that Ashland Electric’s officers are authorized to apply and
2 take a loan in the amount of \$10,000,000 to carry out On-Bill Financing Program;

3 **BE IT ALSO RESOLVED**, that the loan shall bear a maturity date to cover an approximate
4 period of 20 years.

5 SECTION 2. This resolution is effective upon adoption.

6 ADOPTED by the City Council this _____ day of _____, 20__.

7 ATTEST:

8

9 _____

10 Melissa Huhtala, City Recorder

11 SIGNED and APPROVED this _____ day of _____, 20__.

12

13

14 _____

15 Julie Akins, Mayor

16 Reviewed as to form:

17

18 _____

19 David H. Lohman, City Attorney

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**Multi-Tier Action Environmental Compliance Agreement for
Energy Efficiency and Conservation Loan Program and Rural Energy Savings Program**

In accordance with § 1970.55(c), RUS will maintain ultimate responsibility for and control over the environmental review process of multi-tier actions receiving funding through RUS re-lending programs including the Energy Efficiency and Conservation Loan Program and the Rural Energy Savings Program. To assist RUS in meeting its environmental review requirements, [primary recipient] agrees to conduct the following actions in accordance with §§ 1970.55(a)(1-4).

- 1) Prior to re-lending to a qualified consumer, [primary recipient] will:
 - a) Conduct a screening of all proposed uses of funds to determine if each consumer application proposed for funding or financing falls within § 1970.53 or § 1970.54 as a Categorical Exclusion (see Attachment 1).
 - b) Obtain sufficient information from a consumer to evaluate proposals under § 1970.53 or to evaluate an Environmental Report (ER) under § 1970.54 in determining if extraordinary circumstances (as described in § 1970.52) are present.
 - c) Document conclusions regarding the applicability of a Categorical Exclusion for each approved consumer application, and maintain these in an official environmental file.
 - d) Refer to RUS for further environmental review:
 - i) Activities that do not meet the criteria established in Attachment 1
 - ii) Consumer applications with extraordinary circumstances (see § 1970.52) or where there is non-concurrence with a finding under Section 7 of the Endangered Species Act and or Section 106 of the National Historic Preservation Act;
 - iii) Consumer applications that may be in violation of § 1970.12, Limitations on actions during the NEPA process
- 2) [Primary recipient] will maintain documentation from (1)(c) for each approved consumer application in the [primary recipient]'s official records for RUS verification as required by §1970.55(b). The primary recipient must retain documentation for 5 years, to be made available to RUS upon request.
- 3) [Primary recipient] understands that the terms of this agreement will be monitored and verified in RUS compliance reviews and other required audits as required by 1970.55(b).

RUS has provided [primary recipient] a copy of the agency's Environmental Policies and Procedures, 7 CFR Part 1970.

In accordance with § 1970.55(b), [primary recipient] understands that failure to meet the requirements of this agreement will result in penalties that may include written warnings, withdrawal of Agency financial assistance, suspension from participation in RUS programs, or other appropriate action.

I, [primary recipient] hereby agree to the terms and conditions as described above.

Signature of General Manager or equivalent

Title

Date

Attachment 1 – Example activities eligible for multi-tier program environmental compliance implementation

RESP ELIGIBLE ACTIVITY/INVESTMENT	ANTICIPATED ENVIRONMENTAL REQUIREMENT
1. Lighting	1970: 1970: 1970.53(a)(2)(iii);1970.53(c)(2),(3) – human health/safety (asbestos concerns) apply S106: External and certain internal changes to a historic home/district require S106 review
a. Lighting fixture upgrades to improve efficiency	
b. Re-lamping to more energy efficient bulbs	
c. Lighting controls	
2. Heating, Ventilation, and Air Conditioning (HVAC)	1970: 1970.53(c)(2),(3) – human health/safety (asbestos concerns) apply
a. Central Air Systems – Energy Star qualified equipment	
b. Window AC Units – Energy Star qualified equipment	
c. Economizers	
d. Heat pumps	
e. Furnaces – Energy Star qualified equipment	
f. Air Handlers	
g. Programmatic controls	
h. Duct sealing	
3. Building Envelope Improvements	1970: 1970.53(c)(2),(3),(4) – human health/safety (asbestos concerns) apply S106: External changes to a historic home/district require S106 review
a. Improved insulation – added beyond existing levels, or for new construction, above existing building codes	
b. Caulking and weather stripping of doors and windows	
c. Window upgrades – Energy Star qualifying windows	
d. Door upgrades – includes man-doors and overhead doors with integrated insulation and energy efficient windows	
e. Any material listed in Appendix A of DOE's Weatherization Assistance Program (10 CFR Part 440)	
4. Water Heaters	1970: 1970.53(c)(2),(3)
5. Compressed Air Systems	1970: 1970.53(c)(2),(3)
6. Motors	1970: 1970.53(a)(2)(iii); 1970.53(c)(2),(3)
a. High efficiency motors	

b. Variable frequency drive	
7. Boilers, dryers, heaters, and process-related equipment – specific equipment not otherwise listed (commercial coolers/freezers)	1970: 1970.53(c)(2); 1970.54(c)(13) may apply
8. Demand Management (load shifting)	1970: 1970.53(a)(2)(iii)
9. Energy Audits	1970: 1970.53(b)(1)(i),(3)

Attachment 1 – Example activities eligible for multi-tier program environmental compliance implementation

10. On/off Grid Renewable Energy Systems	1970: 1970.53(d)(7),(8); 1970.54(c)(7),(8),(9),(10),(11),(12),(13)) S106: requires S106 review
11. Energy Storage Devices	1970: 1970.53(a)(2)(iii)
12. Replacement of existing fuel consuming equipment	1970: 1970.53(c)(2); 1970.54(c)(13)
13. Energy efficient appliance upgrades fixed to real property	1970: 1970.53(c)(2),(3)
14. Irrigation or water system efficiency improvements	1970: 1970.53(c)(5),(6)
15. Necessary and incidental activities/investments directly related to implementation of an eligible measure	Category is broad; would need specifics to determine which categories under 1970 apply.

Year	1	2	3	4	5	6	7	8	9	10	Years 1-10
Loans Issued	\$ 675,000.00	\$ 900,000.00	\$ 900,000.00	\$ 900,000.00	\$ 900,000.00	#####	#####	#####	#####	#####	9,975,000.00
Number of loans	45	60	60	60	70	70	70	80	80	80	
Repayment											
Principal	53,375.23	127,272.98	204,951.48	286,604.16	372,434.35	474,516.94	581,822.26	706,478.69	837,512.78	975,250.82	4,620,219.70
Interest	32,537.84	73,190.84	110,063.10	142,961.17	171,681.74	203,241.71	229,578.93	257,656.84	279,357.10	294,353.40	1,794,622.66
Total Repayment	85,913.07	200,463.82	315,014.58	429,565.34	544,116.09	677,758.64	811,401.19	964,135.53	1,116,869.88	1,269,604.22	6,414,842.36
Loan Repayment to USDA	53,375.23	127,272.98	204,951.48	286,604.16	372,434.35	474,516.94	581,822.26	706,478.69	837,512.78	975,250.82	4,620,219.70
Program Costs											
Program Administrator											
Amortized start up costs	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	10,000.00
Annual Fee	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	66,400.00
Loan Fee - 1.99%	13,432.50	17,910.00	17,910.00	17,910.00	17,910.00	20,895.00	20,895.00	23,880.00	23,880.00	23,880.00	198,502.50
Total Program Administrator	21,072.50	25,550.00	25,550.00	25,550.00	25,550.00	28,535.00	28,535.00	31,520.00	31,520.00	31,520.00	274,902.50
Loan Originator											
Amortized start up costs	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	12,000.00
Annual Fee	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	210,000.00
Underwriting fee	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	35,000.00
Denied Loans	375.00	375.00	375.00	375.00	375.00	375.00	375.00	375.00	375.00	375.00	3,750.00
Total Loan Originator	26,075.00	26,075.00	26,075.00	26,075.00	26,075.00	26,075.00	26,075.00	26,075.00	26,075.00	26,075.00	260,750.00
Total 3rd Party Administration Costs	47,147.50	51,625.00	51,625.00	51,625.00	51,625.00	54,610.00	54,610.00	57,595.00	57,595.00	57,595.00	535,652.50
Estimated staff wages and salaries	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	90,000.00
Cash provided (used) by for On-Bill Program	(\$14,609.66)	\$21,565.84	\$58,438.10	\$91,336.17	\$120,056.74	\$148,631.71	\$174,968.93	\$200,061.84	\$221,762.10	\$236,758.40	\$1,258,970.16

	11	12	13	14	15	16	17	18	19	20	Years 1-10	Grand
Repayment												
Principal	\$937,236.99	\$867,975.13	\$795,169.71	\$718,639.42	\$638,193.69	\$534,096.76	\$424,674.04	\$290,117.59	\$148,676.98	\$0.00	5,354,780.30	9,975,000.00
Interest	\$246,454.16	\$201,165.26	\$159,419.93	\$121,399.47	\$87,294.43	\$57,748.81	\$33,528.99	\$15,351.09	\$4,057.36	\$0.00	926,419.51	2,721,042.17
Total Repayment	1,183,691.15	1,069,140.39	954,589.64	840,038.88	725,488.12	591,845.58	458,203.03	305,468.68	152,734.34	-	6,281,199.81	#####
Loan Repayment to USDA	937,236.99	867,975.13	795,169.71	718,639.42	638,193.69	534,096.76	424,674.04	290,117.59	148,676.98	-	5,354,780.30	9,975,000.00
Program Costs												
Program Administrator												
Amortized start up costs	-	-	-	-	-	-	-	-	-	-	-	10,000.00
Annual Fee	-	-	-	-	-	-	-	-	-	-	-	66,400.00
Loan Fee - 1.99%	-	-	-	-	-	-	-	-	-	-	-	198,502.50
Total Program Administrator	-	-	-	-	-	-	-	-	-	-	-	274,902.50
Loan Originator												
Amortized start up costs	-	-	-	-	-	-	-	-	-	-	-	12,000.00
Annual Fee	-	-	-	-	-	-	-	-	-	-	-	210,000.00
Underwriting fee	-	-	-	-	-	-	-	-	-	-	-	35,000.00
Denied Loans	-	-	-	-	-	-	-	-	-	-	-	3,750.00
Total Loan Originator	-	-	-	-	-	-	-	-	-	-	-	260,750.00
Total Administration Costs	-	-	-	-	-	-	-	-	-	-	-	535,652.50
Estimated staff wages and salaries	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	-	40,500.00	130,500.00
Cash provided (used) by for On-Bill Program	\$246,454.16	\$201,165.26	\$159,419.93	\$121,399.47	\$87,294.43	\$57,748.81	\$33,528.99	\$15,351.09	\$4,057.36	\$0.00	\$926,419.51	#####

Assumptions
1. 10 year program based on USDA Funding guidelines
2. 5% interest rate per USDA Funding guidelines
3. Amortized start up costs over life of the program - 10 years
4. Assuming 5 denied loans per year
5. Minimal internal costs relating to labor accounted for as no new employees will be hired with the administration of the program
8. Contract prices are not confirmed.
9. Holland, Michigan average loan value over two years \$14,404 with 167 applications and 121 approved with 82 closed loans with total loan value of \$1,181,140.
Program Administrator - \$10,000 start up cost with annual fee of \$5640 plus 1.99% of loan fee taken directly from consumer
Start Up Cost - Amortized \$ 1,000.00
Annual fee \$ 5,640.00
Assuming no escalation fee
Loan Originator - \$12,000 - start up cost with annual fee of \$21,000 (\$1750 per month) and \$360 per loan for underwriting fee and \$75 denied loan
Start up Cost - Amortized \$ 1,200.00
Annual fee \$ 21,000.00
Underwriting loan fee \$ 350.00
Denied loan fee \$ 75.00
Assuming no escalation fee

Year	1	2	3	4	5	6	7	8	9	10	Years 1-10
Loans Issued	#####	\$ 900,000.00	#####	#####	#####	#####	#####	#####	#####	#####	9,975,000.00
Number of loans	45	60	60	60	70	70	70	80	80	80	
Repayment											
Principal	53,375.23	127,272.98	204,951.48	286,604.16	372,434.35	474,516.94	581,822.26	706,478.69	837,512.78	975,250.82	4,620,219.70
Interest	32,537.84	73,190.84	110,063.10	142,961.17	171,681.74	203,241.71	229,578.93	257,656.84	279,357.10	294,353.40	1,794,622.66
Total Repayment	85,913.07	200,463.82	315,014.58	429,565.34	544,116.09	677,758.64	811,401.19	964,135.53	#####	#####	6,414,842.36
Loan Repayment to USDA	53,375.23	127,272.98	204,951.48	286,604.16	372,434.35	474,516.94	581,822.26	706,478.69	837,512.78	975,250.82	4,620,219.70
Program Costs											
Michigan Saves											
Amortized start up costs	10,000.00	-	-	-	-	-	-	-	-	-	10,000.00
Annual Fee	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	6,640.00	66,400.00
Loan Fee - 1.99%	13,432.50	17,910.00	17,910.00	17,910.00	17,910.00	20,895.00	20,895.00	23,880.00	23,880.00	23,880.00	198,502.50
Total Michigan Saves	30,072.50	24,550.00	24,550.00	24,550.00	24,550.00	27,535.00	27,535.00	30,520.00	30,520.00	30,520.00	274,902.50
EFT											
Amortized start up costs	12,000.00	-	-	-	-	-	-	-	-	-	12,000.00
Annual Fee	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	21,000.00	210,000.00
Underwriting fee	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	35,000.00
Denied Loans	375.00	375.00	375.00	375.00	375.00	375.00	375.00	375.00	375.00	375.00	3,750.00
Total WECC	36,875.00	24,875.00	24,875.00	24,875.00	24,875.00	24,875.00	24,875.00	24,875.00	24,875.00	24,875.00	260,750.00
Total 3rd Party Administration Costs	66,947.50	49,425.00	49,425.00	49,425.00	49,425.00	52,410.00	52,410.00	55,395.00	55,395.00	55,395.00	535,652.50
Estimated staff wages and salaries	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	90,000.00
Cash provided (used) by for On-Bill Program	(43,409.66)	14,765.84	51,638.10	84,536.17	113,256.74	141,831.71	168,168.93	193,261.84	214,962.10	229,958.40	\$1,168,970.16

	11	12	13	14	15	16	17	18	19	20	Years 1-10	Grand
Repayment												
Principal	\$937,236.99	\$867,975.13	\$795,169.71	\$718,639.42	\$638,193.69	\$534,096.76	\$424,674.04	\$290,117.59	\$148,676.98	\$0.00	5,354,780.30	9,975,000.00
Interest	\$246,454.16	\$201,165.26	\$159,419.93	\$121,399.47	\$87,294.43	\$57,748.81	\$33,528.99	\$15,351.09	\$4,057.36	\$0.00	926,419.51	2,721,042.17
Total Repayment	#####	1,069,140.39	954,589.64	840,038.88	725,488.12	591,845.58	458,203.03	305,468.68	152,734.34	-	6,281,199.81	#####
Loan Repayment to USDA	937,236.99	867,975.13	795,169.71	718,639.42	638,193.69	534,096.76	424,674.04	290,117.59	148,676.98	-	5,354,780.30	9,975,000.00
Program Costs												
Michigan Saves												
Amortized start up costs	-	-	-	-	-	-	-	-	-	-	-	10,000.00
Annual Fee	-	-	-	-	-	-	-	-	-	-	-	66,400.00
Loan Fee - 1.99%	-	-	-	-	-	-	-	-	-	-	-	198,502.50
Total Michigan Saves	-	-	-	-	-	-	-	-	-	-	-	274,902.50
EFT												
Amortized start up costs	-	-	-	-	-	-	-	-	-	-	-	12,000.00
Annual Fee	-	-	-	-	-	-	-	-	-	-	-	210,000.00
Underwriting fee	-	-	-	-	-	-	-	-	-	-	-	35,000.00
Denied Loans	-	-	-	-	-	-	-	-	-	-	-	3,750.00
Total WECC	-	-	-	-	-	-	-	-	-	-	-	260,750.00
Total Administration Costs	-	-	-	-	-	-	-	-	-	-	-	535,652.50
Estimated staff wages and salaries	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	-	40,500.00	130,500.00
Cash provided (used) by for On-Bill Program	\$241,954.16	\$196,665.26	\$154,919.93	\$116,899.47	\$82,794.43	\$53,248.81	\$29,028.99	\$10,851.09	(\$442.64)	\$0.00	\$885,919.51	#####

Assumptions		
1. 10 year program based on USDA Funding guidelines		
2. 5% interest rate per USDA Funding guidelines		
3. No loan loss reserve because of lien process.		
4. Assuming 5 denied loans per year		
5. Minimal internal costs relating to labor accounted for as no new employees will be hired with the administration of the program		
6. Assumed no Energy Waste Reduction PILOT Funds to be used for program		
7. Potential of reimbursement of start up costs if other municipals join into the program.		
8. Contract prices are not confirmed.		
9. Holland average loan value over two years \$14,404 with 167 applications and 121 approved with 82 closed loans with total loan value of \$1,181,140.		
Michigan Saves - \$10,000 start up cost with annual fee of \$6640 plus 1.99% of loan fee taken directly from consumer		
Start Up Cost - if amortized	\$	1,000.00
Annual fee	\$	6,640.00
Assuming no escalation fee		
EFT - \$12,000 - start up cost with annual fee of \$21,000 (\$1750 per month) and \$360 per loan for underwriting fee and \$75 denied loan		
Start up Cost - if amortized	\$	1,200.00
Annual fee	\$	21,000.00
Underwriting loan fee	\$	350.00
Denied loan fee	\$	75.00
Assuming no escalation fee		

Ashland Electric
On-Bill Finance System
Loan Amortization Schedule
Customer Loan - \$10,000
June 2021

Date of Issuance	1/1/2022
Principal (PV)	\$ 15,000.00
Interest Rate	5.00%
Years	10
Payments Per Year	12
Total Payments (Nper)	120
Amortization	Straightline
Number of Loans	1

Monthly Payment	Principal	Interest	Total
1	(\$96.60)	(\$62.50)	(\$159.10)
2	(\$97.00)	(\$62.10)	(\$159.10)
3	(\$97.40)	(\$61.69)	(\$159.10)
4	(\$97.81)	(\$61.29)	(\$159.10)
5	(\$98.22)	(\$60.88)	(\$159.10)
6	(\$98.63)	(\$60.47)	(\$159.10)
7	(\$99.04)	(\$60.06)	(\$159.10)
8	(\$99.45)	(\$59.65)	(\$159.10)
9	(\$99.87)	(\$59.23)	(\$159.10)
10	(\$100.28)	(\$58.82)	(\$159.10)
11	(\$100.70)	(\$58.40)	(\$159.10)
12	(\$101.12)	(\$57.98)	(\$159.10)
13	(\$101.54)	(\$57.56)	(\$159.10)
14	(\$101.96)	(\$57.13)	(\$159.10)
15	(\$102.39)	(\$56.71)	(\$159.10)
16	(\$102.81)	(\$56.28)	(\$159.10)
17	(\$103.24)	(\$55.85)	(\$159.10)
18	(\$103.67)	(\$55.42)	(\$159.10)
19	(\$104.11)	(\$54.99)	(\$159.10)
20	(\$104.54)	(\$54.56)	(\$159.10)
21	(\$104.97)	(\$54.12)	(\$159.10)
22	(\$105.41)	(\$53.69)	(\$159.10)
23	(\$105.85)	(\$53.25)	(\$159.10)
24	(\$106.29)	(\$52.81)	(\$159.10)
25	(\$106.74)	(\$52.36)	(\$159.10)
26	(\$107.18)	(\$51.92)	(\$159.10)
27	(\$107.63)	(\$51.47)	(\$159.10)
28	(\$108.08)	(\$51.02)	(\$159.10)
29	(\$108.53)	(\$50.57)	(\$159.10)
30	(\$108.98)	(\$50.12)	(\$159.10)
31	(\$109.43)	(\$49.67)	(\$159.10)
32	(\$109.89)	(\$49.21)	(\$159.10)

Monthly Payment	Principal	Interest	Total
33	(\$110.35)	(\$48.75)	(\$159.10)
34	(\$110.81)	(\$48.29)	(\$159.10)
35	(\$111.27)	(\$47.83)	(\$159.10)
36	(\$111.73)	(\$47.37)	(\$159.10)
37	(\$112.20)	(\$46.90)	(\$159.10)
38	(\$112.66)	(\$46.43)	(\$159.10)
39	(\$113.13)	(\$45.97)	(\$159.10)
40	(\$113.60)	(\$45.49)	(\$159.10)
41	(\$114.08)	(\$45.02)	(\$159.10)
42	(\$114.55)	(\$44.55)	(\$159.10)
43	(\$115.03)	(\$44.07)	(\$159.10)
44	(\$115.51)	(\$43.59)	(\$159.10)
45	(\$115.99)	(\$43.11)	(\$159.10)
46	(\$116.47)	(\$42.62)	(\$159.10)
47	(\$116.96)	(\$42.14)	(\$159.10)
48	(\$117.45)	(\$41.65)	(\$159.10)
49	(\$117.94)	(\$41.16)	(\$159.10)
50	(\$118.43)	(\$40.67)	(\$159.10)
51	(\$118.92)	(\$40.18)	(\$159.10)
52	(\$119.42)	(\$39.68)	(\$159.10)
53	(\$119.91)	(\$39.18)	(\$159.10)
54	(\$120.41)	(\$38.68)	(\$159.10)
55	(\$120.92)	(\$38.18)	(\$159.10)
56	(\$121.42)	(\$37.68)	(\$159.10)
57	(\$121.93)	(\$37.17)	(\$159.10)
58	(\$122.43)	(\$36.66)	(\$159.10)
59	(\$122.94)	(\$36.15)	(\$159.10)
60	(\$123.46)	(\$35.64)	(\$159.10)
61	(\$123.97)	(\$35.13)	(\$159.10)
62	(\$124.49)	(\$34.61)	(\$159.10)
63	(\$125.01)	(\$34.09)	(\$159.10)
64	(\$125.53)	(\$33.57)	(\$159.10)
65	(\$126.05)	(\$33.05)	(\$159.10)
66	(\$126.57)	(\$32.52)	(\$159.10)
67	(\$127.10)	(\$32.00)	(\$159.10)
68	(\$127.63)	(\$31.47)	(\$159.10)
69	(\$128.16)	(\$30.93)	(\$159.10)
70	(\$128.70)	(\$30.40)	(\$159.10)
71	(\$129.23)	(\$29.86)	(\$159.10)
72	(\$129.77)	(\$29.33)	(\$159.10)
73	(\$130.31)	(\$28.79)	(\$159.10)
74	(\$130.86)	(\$28.24)	(\$159.10)
75	(\$131.40)	(\$27.70)	(\$159.10)
76	(\$131.95)	(\$27.15)	(\$159.10)
77	(\$132.50)	(\$26.60)	(\$159.10)
78	(\$133.05)	(\$26.05)	(\$159.10)
79	(\$133.60)	(\$25.49)	(\$159.10)
80	(\$134.16)	(\$24.94)	(\$159.10)

Monthly Payment	Principal	Interest	Total
81	(\$134.72)	(\$24.38)	(\$159.10)
82	(\$135.28)	(\$23.82)	(\$159.10)
83	(\$135.85)	(\$23.25)	(\$159.10)
84	(\$136.41)	(\$22.69)	(\$159.10)
85	(\$136.98)	(\$22.12)	(\$159.10)
86	(\$137.55)	(\$21.55)	(\$159.10)
87	(\$138.12)	(\$20.97)	(\$159.10)
88	(\$138.70)	(\$20.40)	(\$159.10)
89	(\$139.28)	(\$19.82)	(\$159.10)
90	(\$139.86)	(\$19.24)	(\$159.10)
91	(\$140.44)	(\$18.66)	(\$159.10)
92	(\$141.03)	(\$18.07)	(\$159.10)
93	(\$141.61)	(\$17.49)	(\$159.10)
94	(\$142.20)	(\$16.90)	(\$159.10)
95	(\$142.80)	(\$16.30)	(\$159.10)
96	(\$143.39)	(\$15.71)	(\$159.10)
97	(\$143.99)	(\$15.11)	(\$159.10)
98	(\$144.59)	(\$14.51)	(\$159.10)
99	(\$145.19)	(\$13.91)	(\$159.10)
100	(\$145.80)	(\$13.30)	(\$159.10)
101	(\$146.40)	(\$12.70)	(\$159.10)
102	(\$147.01)	(\$12.09)	(\$159.10)
103	(\$147.63)	(\$11.47)	(\$159.10)
104	(\$148.24)	(\$10.86)	(\$159.10)
105	(\$148.86)	(\$10.24)	(\$159.10)
106	(\$149.48)	(\$9.62)	(\$159.10)
107	(\$150.10)	(\$9.00)	(\$159.10)
108	(\$150.73)	(\$8.37)	(\$159.10)
109	(\$151.35)	(\$7.74)	(\$159.10)
110	(\$151.99)	(\$7.11)	(\$159.10)
111	(\$152.62)	(\$6.48)	(\$159.10)
112	(\$153.25)	(\$5.84)	(\$159.10)
113	(\$153.89)	(\$5.21)	(\$159.10)
114	(\$154.53)	(\$4.56)	(\$159.10)
115	(\$155.18)	(\$3.92)	(\$159.10)
116	(\$155.82)	(\$3.27)	(\$159.10)
117	(\$156.47)	(\$2.62)	(\$159.10)
118	(\$157.13)	(\$1.97)	(\$159.10)
119	(\$157.78)	(\$1.32)	(\$159.10)
120	(\$158.44)	(\$0.66)	(\$159.10)
Total	(\$15,000.00)	(\$4,091.79)	(\$19,091.79)

Ashland Electric
Energy Optimization Program
June 2021

Date of Issuance	1/1/2022
Principal	\$ 15,000.00
Interest Rate	5.00%
Years	10
Payments Per Year	12
Amortization	Straightline
Number of Loans	45

	1	2	3	4	5	6	7	8	9	10	Total
Principal	1										
Interest											
Total											
Total											
Principal											
Interest											

Ashland Electric
Energy Optimization Program
June 2021

Date of Issuance 1/1/2022
Principal \$15,000.00
Interest Rate 5.00%
Years 10
Payments Per Year 12
Amortization Straightline
Number of Loans 60

	2	3	4	5	6	7	8	9	10		
	1	2	3	4	5	6	7	8	9	10 Total	
1											
Principal	(\$1,186.12)	(\$1,246.80)	(\$1,310.59)	(\$1,377.64)	(\$1,448.12)	(\$1,522.21)	(\$1,600.09)	(\$1,681.96)	(\$1,768.01)	(\$1,858.46)	(\$15,000.00)
Interest	(\$723.06)	(\$662.38)	(\$598.59)	(\$531.54)	(\$461.06)	(\$386.97)	(\$309.09)	(\$227.22)	(\$141.17)	(\$50.72)	(\$4,091.79)
Total	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$19,091.79)
Total											
Principal	(\$71,166.97)	(\$74,808.01)	(\$78,635.33)	(\$82,658.46)	(\$86,887.43)	(\$91,332.75)	(\$96,005.51)	#####	#####	#####	(\$900,000.00)
Interest	(\$43,383.78)	(\$39,742.75)	(\$35,915.43)	(\$31,892.29)	(\$27,663.33)	(\$23,218.00)	(\$18,545.25)	(\$13,633.42)	(\$8,470.30)	(\$3,043.02)	(\$245,507.56)

Ashland Electric
Energy Optimization Program
June 2021

Date of Issuance 1/1/2022
Principal \$15,000.00
Interest Rate 5.00%
Years 10
Payments Per Year 12
Amortization Straightline
Number of Loans 60

	3	4	5	6	7	8	9	10	11	12	
	1	2	3	4	5	6	7	8	9	10	Total
1											
Principal	(\$1,186.12)	(\$1,246.80)	(\$1,310.59)	(\$1,377.64)	(\$1,448.12)	(\$1,522.21)	(\$1,600.09)	(\$1,681.96)	(\$1,768.01)	(\$1,858.46)	(\$15,000.00)
Interest	(\$723.06)	(\$662.38)	(\$598.59)	(\$531.54)	(\$461.06)	(\$386.97)	(\$309.09)	(\$227.22)	(\$141.17)	(\$50.72)	(\$4,091.79)
Total	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$19,091.79)
Total											
Principal	(\$71,166.97)	(\$74,808.01)	(\$78,635.33)	(\$82,658.46)	(\$86,887.43)	(\$91,332.75)	(\$96,005.51)	#####	#####	#####	(\$900,000.00)
Interest	(\$43,383.78)	(\$39,742.75)	(\$35,915.43)	(\$31,892.29)	(\$27,663.33)	(\$23,218.00)	(\$18,545.25)	(\$13,633.42)	(\$8,470.30)	(\$3,043.02)	(\$245,507.56)

Ashland Electric
Energy Optimization Program
June 2021

Date of Issuance 1/1/2022
Principal \$15,000.00
Interest Rate 5.00%
Years 10
Payments Per Year 12
Amortization Straightline
Number of Loans 60

	4	5	6	7	8	9	10	11	12	13	
	1	2	3	4	5	6	7	8	9	10	Total
1											
Principal	(\$1,186.12)	(\$1,246.80)	(\$1,310.59)	(\$1,377.64)	(\$1,448.12)	(\$1,522.21)	(\$1,600.09)	(\$1,681.96)	(\$1,768.01)	(\$1,858.46)	(\$15,000.00)
Interest	(\$723.06)	(\$662.38)	(\$598.59)	(\$531.54)	(\$461.06)	(\$386.97)	(\$309.09)	(\$227.22)	(\$141.17)	(\$50.72)	(\$4,091.79)
Total	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$19,091.79)
Total											
Principal	(\$71,166.97)	(\$74,808.01)	(\$78,635.33)	(\$82,658.46)	(\$86,887.43)	(\$91,332.75)	(\$96,005.51)	#####	#####	#####	(\$900,000.00)
Interest	(\$43,383.78)	(\$39,742.75)	(\$35,915.43)	(\$31,892.29)	(\$27,663.33)	(\$23,218.00)	(\$18,545.25)	(\$13,633.42)	(\$8,470.30)	(\$3,043.02)	(\$245,507.56)

Ashland Electric
Energy Optimization Program
June 2021

Date of Issuance 1/1/2022
Principal \$15,000.00
Interest Rate 5.00%
Years 10
Payments Per Year 12
Amortization Straightline
Number of Loans 60

	5	6	7	8	9	10	11	12	13	14	
	1	2	3	4	5	6	7	8	9	10	Total
1											
Principal	(\$1,186.12)	(\$1,246.80)	(\$1,310.59)	(\$1,377.64)	(\$1,448.12)	(\$1,522.21)	(\$1,600.09)	(\$1,681.96)	(\$1,768.01)	(\$1,858.46)	(\$15,000.00)
Interest	(\$723.06)	(\$662.38)	(\$598.59)	(\$531.54)	(\$461.06)	(\$386.97)	(\$309.09)	(\$227.22)	(\$141.17)	(\$50.72)	(\$4,091.79)
Total	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$19,091.79)
Total											
Principal	(\$71,166.97)	(\$74,808.01)	(\$78,635.33)	(\$82,658.46)	(\$86,887.43)	(\$91,332.75)	(\$96,005.51)	#####	#####	#####	(\$900,000.00)
Interest	(\$43,383.78)	(\$39,742.75)	(\$35,915.43)	(\$31,892.29)	(\$27,663.33)	(\$23,218.00)	(\$18,545.25)	(\$13,633.42)	(\$8,470.30)	(\$3,043.02)	(\$245,507.56)

Date of Issuance	1/1/2022
Principal	\$ 15,000.00
Interest Rate	5.00%
Years	10
Payments Per Year	12
Amortization	Straightline
Number of Loans	70

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Ashland Electric
Energy Optimization Program
June 2021

Date of Issuance	1/1/2022
Principal	\$ 15,000.00
Interest Rate	5.00%
Years	10
Payments Per Year	12
Amortization	Straightline
Number of Loans	70

[illegible]

Date of Issuance	1/1/2022
Principal	\$ 15,000.00
Interest Rate	5.00%
Years	10
Payments Per Year	12
Amortization	Straightline
Number of Loans	80

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Ashland Electric
Energy Optimization Program
June 2021

Date of Issuance 1/1/2022
Principal \$ 15,000.00
Interest Rate 5.00%
Years 10
Payments Per Year 12
Amortization Straightline
Number of Loans 80

	9	10	11	12	13	14	15	16	17	18	
	1	2	3	4	5	6	7	8	9	10	Total
1											
Principal	(\$1,186.12)	(\$1,246.80)	(\$1,310.59)	(\$1,377.64)	(\$1,448.12)	(\$1,522.21)	(\$1,600.09)	(\$1,681.96)	(\$1,768.01)	(\$1,858.46)	(\$15,000.00)
Interest	(\$723.06)	(\$662.38)	(\$598.59)	(\$531.54)	(\$461.06)	(\$386.97)	(\$309.09)	(\$227.22)	(\$141.17)	(\$50.72)	(\$4,091.79)
Total	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$19,091.79)
Total											
Principal	(\$94,889.30)	(\$99,744.02)	(\$104,847.11)	(\$110,211.29)	(\$115,849.90)	(\$121,777.00)	(\$128,007.35)	(\$134,556.45)	(\$141,440.61)	(\$148,676.98)	(\$1,200,000.00)
Interest	(\$57,845.04)	(\$52,990.33)	(\$47,887.23)	(\$42,523.06)	(\$36,884.44)	(\$30,957.34)	(\$24,726.99)	(\$18,177.90)	(\$11,293.73)	(\$4,057.36)	(\$327,343.42)

Ashland Electric
Energy Optimization Program
June 2021

Date of Issuance 1/1/2022
Principal \$ 15,000.00
Interest Rate 5.00%
Years 10
Payments Per Year 12
Amortization Straightline
Number of Loans 80

	10	11	12	13	14	15	16	17	18	19	
	1	2	3	4	5	6	7	8	9	10	Total
1											
Principal	(\$1,186.12)	(\$1,246.80)	(\$1,310.59)	(\$1,377.64)	(\$1,448.12)	(\$1,522.21)	(\$1,600.09)	(\$1,681.96)	(\$1,768.01)	(\$1,858.46)	(\$15,000.00)
Interest	(\$723.06)	(\$662.38)	(\$598.59)	(\$531.54)	(\$461.06)	(\$386.97)	(\$309.09)	(\$227.22)	(\$141.17)	(\$50.72)	(\$4,091.79)
Total	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$1,909.18)	(\$19,091.79)
Total											
Principal	(\$94,889.30)	(\$99,744.02)	(\$104,847.11)	(\$110,211.29)	(\$115,849.90)	(\$121,777.00)	(\$128,007.35)	(\$134,556.45)	(\$141,440.61)	(\$148,676.98)	(\$1,200,000.00)
Interest	(\$57,845.04)	(\$52,990.33)	(\$47,887.23)	(\$42,523.06)	(\$36,884.44)	(\$30,957.34)	(\$24,726.99)	(\$18,177.90)	(\$11,293.73)	(\$4,057.36)	(\$327,343.42)

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ON-BILL FINANCING PROGRAM IMPLEMENTATION WORKPLAN

Version 1.0



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DOCUMENT HISTORY

Document Version	Date Posted	Description
1.0	6/10/2021	First version of program presented to City Council.



INTRODUCTION

This report outlines the details and requirements of the Ashland Electric Utility's On-Bill Financing program. This report serves as a reference for anyone who wants to learn more about the On-bill Financing Program, including customers and contractors.

Project Purpose

High up-front costs and lack of access to financing are significant barriers to investing in energy efficiency and renewable energy improvements. The purpose of this program is increase access to financing and promote investment in energy efficiency and renewable energy by providing affordable loans that a customer can repay on their monthly electric bill.

Why On-Bill Programs?

On-Bill Financing generally refers to a financial product that is serviced by, or in partnership with, a utility. Ashland Electric created the On-Bill Financing Program to provide easy, affordable loans for building owners to install approved energy efficiency and renewable energy improvements.

Energy efficiency investments are a cost-effective means to decrease energy consumption, enhance building comfort, and reduce utility bills. Despite the benefits of energy efficiency investments high up-front costs can be a significant barrier to investing in home energy improvements. A residential energy efficiency upgrade that includes insulation; building envelope upgrades; and heating, ventilation, and air conditioning (HVAC) improvements will often cost thousands of dollars while installing a renewable energy system is even more costly. Rebate programs do not significantly lower this barrier. A program that allows customers to repay financing for these improvements by adding incremental payments to their utility bills is one way to overcome up-front cost barriers.

Existing clean energy financing tools often use traditional underwriting criteria and may not be available or attractive to all customers, such as those with tarnished credit. Customers who do not qualify for these programs may qualify using more equitable underwriting criteria, such as utility repayment history. Increasing access to financing is essential for reaching large numbers of building owners and unlocking the many benefits of energy efficiency, and renewable energy.

Program Description

The On-Bill Financing program provides easy, affordable loans to building owners for approved energy efficiency and renewable energy improvements. Customers pay back the loan through a per-meter charge on their utility bill. The loan payment is considered part of the charges for electric services to the property. The On-Bill Financing program will lend utility customers up to \$30,000 to implement approved energy efficiency and renewable energy measures.



Loan Benefits

Benefits for Ashland Electric Utility Customers include:

- Reduced up-front costs for efficiency and renewables
- Lower energy use and environmental impact;
- Attractive loan terms;
- Loans associated with the property and can transfer to new owner if sold or be paid off in full at the time of sale;
- Energy efficiency measures;
- Simple qualifications -- no credit score or income requirement to be eligible;
- Home energy assessment;
- Qualified contractors; and,
- Improve home health and comfort.

Benefits for Ashland Electric include:

- Reduce long-term energy costs to utility and customers.
- Reduce regional energy consumption, slow load growth, and reduce peak power demands.
- Support community investment in high-efficiency buildings and renewable energy infrastructure.
- Increase utility and customer engagement.
- Reduce environmental impact.
- Increase efficiency of existing building inventory.
- Leverage federal funding to create a more efficient and renewable Ashland.
- Develop long-term partnership to sustainably re-lend \$10 million of USDA-RESP funds.
- Build on Ashland Electric's experience with on-bill financing and energy incentives.

Project Objective

The project's specific objective is for the Ashland Electric to lend \$10 million in on-bill financing to utility customers over 10 years, to enable utility customers to invest in approved energy efficiency and renewable energy improvements.



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SUMMARY OF THE ON-BILL FINANCING PROGRAM

Program Overview

Under the Program, building owners within the service territory of Ashland Electric, can finance any eligible energy efficiency or renewable energy improvement. The improvement must be implemented by an Authorized Contractor following the completion of a comprehensive, whole-home energy audit.

Eligible energy improvements include any measure or piece of equipment documented in the On-Bill Financing Implementation Manual (IM) —such as air sealing, air source heat pumps, heat pump water heaters, high efficiency-appliances, doors, insulation, roofs, water heaters, and windows; as well as renewable energy measures like solar photovoltaic (PV) systems. (See Appendix A for a sample list of eligible measures.)

Building owners may also finance the remediation of pre-existing environmental hazards or the repair of physical and structural defects that create health and safety issues, so long as the remediation or repairs are necessary to allow for an appropriate efficiency measure and the cause(s) of the environmental hazard or physical defect are addressed. All improvements must be implemented by an authorized contractor following the completion of a comprehensive, whole-home energy audit. Non-energy improvements are capped at 15 percent of loan amount.

Loans under this program are secured loans for amounts of \$5,000–\$30,000 at a fixed-rate interest with terms of up to 120 months (10 years). (Details are provided in Table 1.) Capital for the On-bill Financing Program is expected to be provided through the United States Department of Agriculture (USDA) Rural Energy Savings Program (RESP) Loan. Maximum amount requested will be \$2,000,000 per year. Up to a maximum \$150,000 of annual capital could come from the Utility’s Oregon Clean Fuels Program revenue with approval of Ashland Electric Utility and Ashland City Council. As required by the Rural Energy Savings Program Loan Fund Ashland Electric will have a reserve cash amount for the outstanding loan amount designated as collateral. Ashland Electric will be utilizing the ability to lien properties for any delinquent amount allowing for full collection of outstanding amounts due, therefore not requiring a debt reserve fund.

Table 1. Loan Product Details.

	Minimum standards
Eligible properties	Commercial and residential buildings with current certificate of occupancy within the service territory of Ashland Electric Utility.
Loan type	Unsecured loan that may be added to property’s tax bill and enforced against the Property through the tax lien foreclosure process in the same manner and with the same priority as the charges for your electric service and real property taxes.

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	Notice of the loan is recorded with the register of deeds for the county in which the property is located, and the obligation to pay the loan payment runs with the land and is binding for future customers contracting for electric service to the property. Multiple loans per customer are allowed if the total amount financed does not exceed the maximum allowable loan amount (below). Multiple loans will be consolidated into one loan at the interest rate(s) in the effect at the time of issuing the additional loan.
Repayment mechanism	Customers will pay back the loan through a per-meter charge on the monthly Ashland Electric bill. The payment is considered part of the charges for electric services to the property. Ashland Electric has the authority to disconnect the customer's utility service for nonpayment of the loan.
Eligible improvements	Energy-saving home improvements list in the On-Bill Financing Implementation Manual and installed by an Authorized Contractor following the completion of a comprehensive whole-home energy assessment. Code-required upgrades for health and safety which are necessary to allow for an appropriate efficiency measure (non-energy improvements are capped at 15 percent of loan amount).
Loan amounts	\$5,000 to \$30,000
Loan term	10 years or the life of the measure, whichever is less.
Loan rates	5%, with potential 3-4% rate for qualifying households enrolled in energy assistance.
Key underwriting criteria	Twelve consecutive months with no delinquencies on electric utility bill payment history.
Loan agreement	Loans are made directly from the Energy Efficiency / On Bill Financing Loan Project to the customer.

Participant Roles and Responsibilities

Numerous organizations are involved in this program—from the program's marketing to the installation and financing of improvements and program monitoring. Roles of key entities referenced in this report are summarized in Table 2.

Table 2. Participant Roles and Responsibilities

Program Participant	Responsibilities
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Program administrator	• Recruit utility participants; arrange for loan origination and servicing; manage and oversee provider contracts (lender, originator, servicer, etc.). • Research data needs and requirements; develop and/or coordinate the data exchange protocols. • Establish quality assurance criteria and procedures. • Develop metrics and reporting requirements. • Recruit, register, and oversee authorized installation contractors and energy auditors that provide services and promote financing under the program. • Develop contractor training materials and conduct contractor training. • Develop and implement an outreach plan and a branding/marketing strategy. • Create marketing collateral to be used by participating utilities and contractors. • Develop and maintain systems for capturing project data. • Conduct customer satisfaction surveys and quality assurance inspections. • Monitor program results and impacts; create monthly and annual program performance reports.
City of Ashland Electric Utility	• Work with capital provider, loan originator, and utility staff to develop underwriting criteria. • Work with the capital provider and loan originator to develop the loan application. • Promote loan program to customers and provide support (e.g. customer service, contractor outreach). • Collect loan payments. • Bill customers. Finalize program structure; create all program documents; and develop a program implementation report. • Coordinate the legal review of program structure and documents. • Coordinate Ashland Electric rebates. (Ashland Electric rebates and incentives associated with the work pertaining to the loan application may be applied to the loan repayment, or may be issued as separate payments as determined by City and Program staff.) • Provide loan capital. • Pay installation contractor upon completion of work.



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	• Hold loan agreements with customers. • Record notice of loan with register of deeds with county where property is located. • Discharge loan from register of deeds upon notification of full repayment.
Loan originator	• Accept loan applications from customers. • Review underwriting criteria to determine loan eligibility. • Create and distribute loan packet to customer. • Provide signed loan packet to capital provider. • Send new loan information to servicer. • Maintain license per federal and state laws; follow legal report lines in the lending and decision-making processes.
Loan servicer – City of Ashland Electric Utility (Utility Billing)	• Process loan payments. • Keep track of principal and interest paid. • Monitor delinquencies. • Notify utility of monthly loan payment amounts to be collected on utility bill. • Notify customer, utility, and capital provider upon full repayment of loan.
Customer / building owner	• Select authorized contractor for energy audit and improvements. • Apply for loan.
Residential energy auditor	• Conduct comprehensive whole-home energy assessments. • Promote financing to customers.
Installation contractor	• Install energy-saving or renewable energy improvements under contract with the customer. • Promote financing to customers (can be the same company as energy auditor).



LENDING REQUIREMENTS

Overview of Lending Requirements

The authorized lender provides loans to customers whose residential property is located within the service area of Ashland Electric. The loans comply with all applicable consumer lending laws. Customers will repay the loan monthly through a per-meter charge on their utility bill. The payment is considered part of the charges for electric services to the property. Consequences for nonpayment are the same as other utility service charges; the balance owed could be enforced in the same way that delinquency with utility service payments is handled.

Customer Eligibility

Eligibility requirements for the Ashland Electric On-bill Financing Program include the following:

- Property must be located within the service area of Ashland Electric.
- The customer must have an active Ashland Electric account in good standing, with no shut-off notices in the last 12 months.
- The name of the loan applicant must be the name on the utility account.
- Applicant must meet underwriting criteria. (For details, see Table 1 above.)
- Applicant must complete a home energy audit. (See the Comprehensive Energy Assessment below.)
- Rental properties are eligible.
 - In Landlord/Tenant situations the Landlord must have the electric service in their name to be able to apply for the loan.

Customers who qualify for free or lower-cost weatherization or retrofit programs are encouraged to take advantage of those programs before seeking loans through the program. Examples of such programs include the following:

- Weatherization Assistance Program: Administered by the state and local community action agencies.
- Utility income-qualified weatherization programs.
- U.S. Department of Agriculture loan and grant programs.
- Customers are encouraged to contact individual programs for detailed eligibility requirements and current program information.

Loan Application Process

We expect that many building owners will learn about Ashland Electric's On-bill Financing Program from contractors and outreach efforts of utility participants. In some cases, contractors will promote their affiliation with the program through marketing materials. Regardless of the flow of contact between a customer and an authorized contractor, the enrollment process remains the same.



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Step One: The customer contacts an authorized contractor to perform an energy assessment and identify potential energy improvements. (See the Eligible Improvements section below for details.) As part of the energy assessment, the contractor should perform "test-in" diagnostics, unless asbestos or other 11 hazardous materials are present in the home. The contractor should provide the customer with a detailed work plan and the cost for the proposed improvements.

Step Two: The contractor provides information about the on-bill loan program to the customer. If the customer would like to apply for the on-bill loan, the contractor initiates the loan application process for the customer by accessing the loan application center via phone or internet. The customer completes the loan application or sends a paper copy by mail. The loan application includes a consent form, which authorizes the release of the customer's utility bill payment history to loan application center. In most cases, the customer will receive a decision within minutes. The customer will be notified, in writing, if their loan application is approved, conditionally approved, or denied. If the loan application is conditionally approved, the customer will be asked to provide additional documentation to complete the application process. (See Appendix B for a sample loan application.)

Step Three: If a customer's loan application has been approved, and they wish to move forward with the on-bill loan, the customer should sign the contractor's agreement, the loan documents, and schedule the project through their contractor.

Step Four: The contractor installs the equipment according to the work plan and the contract with the customer. A "test out" procedure, such as a blower door test, may also be conducted to ensure that the improvements were installed properly. As necessary, the work plan could be modified to add or subtract energy efficiency, renewable energy, or nonenergy building performance improvements. If a change in the work plan caused the cost of the project to increase or decrease, the customer will have to sign new loan documentation that reflects the new project cost.

Step Five: After installation and the test-out procedure (as applicable), the contractor obtains the customer's signature on a certificate of completion (COC) and sends the COC to the lender. Once this is received an on-site audit may be performed to ensure the work plan was followed and the job is complete. This triggers payment to the contractor. (See Loan Closing and Servicing section below for more detail.) Payments are made directly to the contractors, minus an administrative fee, and normally arrive within seven to ten days.

Step Six: The contractor logs into their account, created when the contractor became authorized to participate in the on-bill loan program, and creates a new specification sheet (also called spec sheet or project record). The contractor attaches the signed COC and other project documentation, such as the detailed work plan, energy assessment report, and cost-benefit analysis, to this spec sheet. Once the spec sheet is complete, the contractor submits it to the program administrator so that quality assurance procedures can be implemented and energy savings calculated.



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Step Seven: The customer repays the loan via direct billing by the participating utility on their monthly utility bill.

Loan Origination

The loan originator performs the following functions:

- Verifies that the contractor initiating the loan application and performing the work is authorized by the program administrator.
- Obtains consent from the applicant to acquire customer and/or credit history (as specified in underwriting criteria in Table 1.) and determines eligibility for loan.
- Obtains consent from the applicant for lender, contractor, and Ashland Electric to disclose customer- specific information about the improvements made, financing provided, and pre- and post-installation energy savings to the program administrator.
- Confirms compliance with program requirements.
- Communicates loan approval immediately (within minutes) upon receiving the loan application submission via web or phone.
- Facilitates the fulfillment of the loan requirements of the lender, including customer enrollment and generating loan agreements. (See Appendix C for sample loan agreement.)

Loan Closing and Servicing

The authorized lender will comply with all consumer lending laws. Once loan origination is complete, the customer will sign the loan documents. If the scope of work changes after the loan documents are signed, but before project completion, the contractor will prepare a change order with the revised project cost and submit to the lender. The customer would then sign revised loan documents.

Payment to the contractor will not occur until the work is completed and the borrower has signed a COC, created a spec sheet, and uploaded all supporting project documentation. Ashland Electric reserves the right to periodically inspect work upon completion. This COC certifies that the borrower is satisfied with the completed work and consents to share certain information with the program administrator. The contractor will submit the signed COC to the program administrator, who will transmit it to Ashland Electric, thereby affirming project completion and triggering payment to the contractor.

Ashland Electric will begin billing the customer on the customer's utility bill after the loan is closed in accordance with their established billing practices. Customers can make extra payment on the loan or pay off the loan early, without penalty, if they choose. Extra payments or payoffs should be sent directly to the lender.

Consequence for nonpayment will be the same as for other utility service charges: service can be shut-off for nonpayment, according to the terms of Ashland Electric's shut-off policy. Unpaid loan accounts can be collected just like delinquent tax payments.



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Notice of the loan will be recorded with the register of deeds for the county in which the property is located, and the obligation to pay the loan payment will stay with the property and be binding on future owners of the property. (See Appendix C for details.) When the property is sold (or rented), the property owner must disclose the loan to the prospective buyer or renter.

Fees

To maintain and monitor the network of contractors promoting the financing, the program administrator assesses authorized contractors a fee of 1.99% of the loan value upon loan closing. Ashland Electric withholds the 1.99% fee from the checks sent to contractors. Ashland Electric sends the fees to the program administrator monthly, along with a report that summarizes loan activity. The contractor agrees to the 1.99 percent fee when they join the on-bill loan program and sign the contractor agreement.



ELIGIBLE IMPROVEMENTS

Financing may only be used for qualifying energy efficiency, renewable energy, or nonenergy building performance improvements installed by authorized contractors. Measures installed by the building owner—or by any other individual or company not authorized (or not acting as a sub-contractor for an authorized contractor)—are not eligible for financing. Additionally, improvements must save energy, unless the improvements are nonenergy building performance improvements related to energy efficiency, or renewable energy installations. A comprehensive energy assessment is required on every project before any improvements are made. In some cases, the replacement of recently-failed equipment may be eligible for On-Bill Financing, but is subject to additional review by the program administrator and/or Ashland Electric staff.

Comprehensive Energy Assessment

A comprehensive home energy audit (or assessment) by a certified home energy auditor must be completed before the customer applies for financing. A home energy audit is an evaluation of the energy performance of a residential structure—conducted by a qualified person using building performance diagnostic equipment and complying with American National Standards Institute approved home energy audit standards. The audit must meet both of the following requirements:

1. Determines how best to optimize energy performance while maintaining or improving human comfort, health, and safety, as well as the durability of the structure.
2. Includes a baseline energy model and cost-benefit analysis for recommending energy efficiency improvements.

With a comprehensive home energy assessment, building owners are encouraged to implement multiple measures. Whenever recommended by the assessment, health and safety measures must be implemented for the project to be eligible for financing. Contractors must follow <Technical Reference> standard for blower door test procedures when suspected asbestos or other hazardous materials are present.

Energy assessments must be conducted no more than 12 months prior to the loan application.

Customers can pay for the energy assessment up front or roll the cost into their loan. If a building owner does not implement any improvement identified by the energy assessment, or is not approved for financing, the building owner must pay the full cost of the energy assessment.

Eligible Measures List

Appendix A contains a list of eligible measures. Building owners can finance any eligible energy efficiency, renewable energy, or nonenergy building performance improvement that is implemented by an authorized contractor.



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Eligible improvements include: air sealing, air source heat pumps, heat pump water heaters, appliances, boilers, doors, insulation, roofs, skylights, water heaters, and windows; as well as renewable energy measures like solar PV. Improvements eligible for this program are selected from a list of upgrades that have energy savings documented by the [Regional Technical Forum](#) (or comparable methodology).

The on-bill loan program also allows customers to finance the remediation of pre-existing environmental hazards or the repair of physical/structural defects that create health and safety issues (collectively known as nonenergy building performance improvements). The customer may only finance nonenergy building performance improvements if they are coupled with an appropriate efficiency measure, and if the cause(s) of the environmental hazard or physical defect are addressed. (See Nonenergy Building Performance Improvements below).

All appliances and other replaced equipment must be disabled and taken out of service permanently and must be either recycled or disposed of in accordance with local, state, and federal laws, codes, and ordinances. Appliances and other replaced equipment may not be re-used.

In some cases the replacement of recently-failed equipment may be eligible. To be eligible A comprehensive energy assessment must be conducted and loan application should be submitted within 45 days of equipment failure. Additional information may be required to determine historical equipment performance. Applications for the replacement of recently-failed equipment may be subject to additional review.

All work must be performed in accordance with all applicable federal, state, and local codes and standards, and contractors must obtain all required permits from local authorities.

Renewable Energy Improvements

Building owners can use the on-bill financing program for renewable energy measures like solar PV systems. For all solar PV system installations, authorized contractors must also obtain appropriate City of Ashland building permits. The solar PV system must comply with current City of Ashland Interconnection Requirements. Contractors must provide a copy of the interconnection agreement or of the authorization letter with the COC. Ashland Electric has the right to prohibit renewable energy installations. Customers should check with Ashland Electric before starting any renewable energy project.

Residential wind turbines are not eligible for financing. Solar electric systems utilizing Virtual Net Metering are not eligible at this time.

Nonenergy Building Performance Improvements

The on-bill financing program also allows customers to finance the remediation of preexisting environmental hazards or the repair of physical/structural defects that create health and safety issues. The customer may only finance nonenergy building performance improvements if the improvements are

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coupled with an appropriate efficiency measure, and if the cause(s) of the environmental hazard or physical defect are addressed. Examples of this type of work include but are not limited to the following:

- Asbestos abatement with air sealing or when installing a new boiler system.
- Electric service upgrade, necessary when installing a new heating/cooling unit.
- Upgrade of knob and tube wiring to install insulation.
- Radon and lead abatement work.
- The cost of removing an oil tank when done with a heating system replacement.
- Repairs to the home due to water damage, molds or mildew, ice dams, or other symptoms of poor building performance if the cause(s) of building performance-related damage are addressed.

In each of these examples, the remediation of the environmental hazard is necessary to allow for the installation of an efficiency measure. Customers cannot finance the remediation work on their own. A customer must also install a related efficiency measure.

Any remediation work must be performed by a contractor who is qualified, and in many cases, licensed for the task. Contractors should not attempt to remediate environmental hazards or correct physical defects they are not trained or qualified to repair. Doing so will increase contractors' liability and jeopardize their participation in the program. Authorized contractors who can remediate environmental hazards should consider obtaining pollution occurrence (also called pollution liability) insurance to protect them from liability.



AUTHORIZED CONTRACTORS

All energy-saving, or renewable energy improvements that qualify for financing must be installed by an authorized contractor (i.e., energy auditors and contractors installing qualifying improvements to homes). The program administrator authorizes and manages the contractors. To be authorized, the contractor must meet certain minimum requirements, including appropriate insurance, licensure, and program training. (See Table 3 below for details.) These requirements are reflected in the contractor application that must be completed by the contractor to become an authorized contractor. Authorized contractors can implement any energy efficiency measure on the eligible measures list. (See Appendix A for details.) In all cases, a baseline home energy audit must be conducted before an energy project is undertaken. (See details about requirements for the audit in the Comprehensive Energy Assessment above.)

Table 3. Contractor Minimum Requirements

Category	Description	Documentation Required
Business Organization, Financial/Ethical Stability		
Licensed business	The company is registered with the Corporations Division at the State of Oregon	License number and business type (LLC, corporation, etc.) on application form
Workers' compensation or self insurance	Required for all contractors unless they are a sole proprietor or limited partnership, which are exempt under state law, or a corporation or a limited liability company that has filed for an exclusion	Insurance certificate, proof of sole-proprietorship, or state exclusion form
General liability	Required with minimum coverage of \$2,000,000 per occurrence, \$2,000,000 aggregate	Insurance certificate with Ashland Electric shown as a certificate holder
Add as certificate holder	Contractors must add Ashland Electric as a certificate holder to their certificate of insurance	Insurance certificate with Ashland Electric shown as a certificate holder
License/Certification		
Skilled trade license	Active license in applicable trade (see Table 3), as required by law with no pending actions against the license	Copy of license and confirmation of no pending action on application form
Federal lead-safe certification*	Required for any contractor with a residential builders or maintenance and alterations license (strongly suggested, but optional, for all other contractors)	Proof of successful completion
Training/Education		



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On-Bill Financing Program training	Contractor training session on program requirements and financing.	Proof of participation
* As of April 22, 2010, the U.S. Environmental Protection Agency (EPA) requires that contractors performing renovation, repair, and painting projects that disturb lead-based paint in homes, child care facilities, and schools must be certified and follow specific work practices to prevent lead contamination if the structure was built before 1978. Firms can become certified by completing an application and sending in a fee payment. Applications may take up to 90 days to be approved by the EPA. Individual renovation contractors must complete an EPA-accredited training course to receive certification. More information is available at http://www.epa.gov.		

Any installation contractor performing work in a trade that requires a state license must have a valid license specific to that trade. The relevant state licenses are listed in Table 4. All contractors must have an active construction contractors license and be in good standing with the Construction Contractors Board.

Table 4. Summary of State Licensing Requirements for Contractors

Skilled Trade	License	Special Designations
Construction, including insulation, remodeling, and weatherization	Residential builders	None
Electrical	Electrical contractor or master electrician	None
Mechanical	Mechanical contractor	1. Hydronic heating, cooling, and process piping 2. Heating, ventilation, and air conditioning (HVAC) equipment 3. Ductwork 4. Refrigeration 5. Limited heating service 6. Unlimited heating service 7. Limited refrigeration and air conditioning service 8. Unlimited refrigeration and air conditioning service 9. N/A for program 10. Oregon Solar License
Plumbing	Plumbing contractor or master plumber	None



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Solar Photovoltaic	Master electrician or electrical contractors license, and residential builders license	None
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Note: This table is subject to update and revision.

Because of the complex nature of solar PV systems, the program has additional requirements for solar PV installation contractors. These additional requirements reflect the program administrator's desire that only experienced contractors install these systems.

Contractors must provide documentation that they meet the following minimum requirements:

- Master Electricians license or Electrical Contractors license and a Residential Builders license

If a contractor does not hold the appropriate licenses, they should provide a copy of their sub-contractor's license.

Contractors should also meet one of the following requirements:

- North American Board of Certified Energy Practitioners (NABCEP) Solar PV Installer Certification; or
- NABCEP Solar PV Entry Level Program and two installations totaling 1 kWDC with at least 1 solar PV system that include an inverter and is subject to a complete electrical permitting and inspection process by local authorities. The contractor must have served as foreman, site supervisor, or site manager responsible for the quality of the installation—for both installations; or
- Installations of at least four solar PV systems with three that include an inverter and are subject to a complete electrical permitting and inspection process by local authorities. The contractor must have served as foreman, site supervisor, or site manager responsible for the quality of the installation for at least three of the installations.

Contractor Training

Authorized contractors must participate in training before performing any work under the on-bill financing program. At least one designated employee for each contractor must attend the training. That individual will serve as the contractor's point person to train other employees. While they are not required to do so, other employees having direct contact with customers, particularly those promoting the on-bill loan program, are strongly encouraged to attend the training.

The program training covers the following topics:

- Role of authorized contractors in the program



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- Program guidelines, including eligible improvements
- Customer eligibility and enrollment process
- Use of forms
- Marketing and communications guidelines
- Quality assurance process

Administrative Fees Assessed to Contractors

Authorized contractors shall pay to the program administrator a fee of 1.99% of the loan amount for work completed under the program. The proceeds from collected fees are used by the program administrator to sustain the program's operations. The fee will be deducted from the amount sent by the lender to the contractor.



BILLING AND PAYMENT

Contractor Payment

After the work is satisfactorily completed, the customer and contractor will sign a COC. The contractor is responsible for submitting this form, the spec sheet, and all supporting documentation to the program administrator. Once the COC is received, the lender will pay the contractor. The contractor will be paid within seven days of receipt of the signed COC.

Customer Rebates

The on-bill loan program is designed to complement utility rebates, state rebates, contractor incentives, and federal tax credits. For incentives offered by the State of Oregon or Ashland Electric, the customer should follow the redemption procedures outlined by those entities. While the contractor can help the customer complete incentive paperwork, the customer is responsible for submitting the rebate form. The customer is also responsible for claiming any applicable federal tax rebates. The contractor will provide all the necessary product information and costs for customers to include in their tax filing.

Because rebate amounts and availability can change quickly and without notice, the program administrator strongly suggests that contractors and customers contact the utility directly for up-to-date information prior to installing any efficiency measure. The program administrator has no control or influence over any rebate program and makes no assurances or guarantees as to rebate amounts or availability. The rebate applied for through Ashland Electric will be applied towards the loan. This only applies to the rebate pertaining to the energy saving measure(s) on the work plan associated with the loan.

The program does not currently provide for a contractor buy-down of the interest rate on a loan. However, contractors may apply other types of incentives before or after the loan is finalized (rebates, cash back, etc.). The contractor shall report any incentives accepted by the customer on the spec sheet.



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CUSTOMER INQUIRIES

Customer inquiries regarding loan-related questions should be directed to the lender. Customers should direct any billing questions to Ashland Electric. Customer complaints regarding services, equipment, or authorized contractors should be directed to the program administrator.

The program administrator oversees all aspects of the on-bill loan program, including program participants, processes, and external communications. In this role, the program administrator reviews certain credentials of the contractors. However, the program administrator does not "certify," "approve," or "qualify" contractors. The program administrator cannot endorse or make any warranties as to the work or business practices of a contractor. The program administrator encourages each customer to research the contractor's work through word of mouth, contractor ratings, customer networks (such as Angie's List), and the Better Business Bureau.

If a customer makes a complaint with the program administrator regarding a contractor's performance, workmanship, or professionalism, the program administrator will note the complaint in the contractor's permanent file and take appropriate action. Repeated customer complaints can result in a contractor's suspension or termination from the program.



QUALITY ASSURANCE

Contractors promoting financing must provide high-quality work and comply with the requirements outlined in this report. The program administrator will perform certain quality assurance (QA) functions to confirm that—on a consistent basis—the financed measures qualify under program guidelines and were installed in accordance with applicable program requirements and industry standards, ensuring that energy savings can reasonably be achieved.

Quality Assurance Objectives

The QA objectives are to:

- Clearly define and educate contractors on the program requirements and institute processes and systems to avoid problems where possible and to proactively identify potential issues
- Verify that financed measures are qualifying improvements under program guidelines
- Verify that the contractor followed Ashland Electric program guidelines in performing the work and related paperwork requirements
- Verify that there were no fraudulent or misleading actions on the part of the contractor or auditor
- Confirm customer satisfaction with contractor's performance and quality of work
- Provide a process for evaluation of contractor performance and workmanship and the resolution of identified problems

Quality Assurance Procedures

The QA procedures for overall program compliance and installation of measures are summarized in Table 6. These procedures combine contractor training and feedback through traditional oversight, while also providing a high level of assurance for building owners that measures were installed correctly, a check for fraudulent activity, and continual improvement from contractors.

The QA procedures generally follow the Home Performance with ENERGY STAR® (HPwES) model, including document reviews, file checks, and site inspections. <Program Administrator> will coordinate with any HPwES program in the state, such as the Consumers Energy program, to use that program's QA in lieu of most of these procedures. In addition, to avoid duplication, <Program Administrator> will coordinate with third-party accreditation programs on QA activities for contractors participating in the <Program Administrator> program.

Table 5. Summary of Quality Assurance Procedures

QA Measure	Purpose
Document review	Review COC for signatures and specification sheet for compliance with program guidelines



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Customer satisfaction survey	Confirm contractor work quality and customer satisfaction with overall program—screen for site inspection
Phone call to customer	Verify customer satisfaction—screen for site inspection
Site inspections (periodic)	Verify accurate reporting and appropriate installation of measures

Document Review

After the COC and the specification sheet are uploaded to <Program Administrator> through the OCP, <Program Administrator> reviews the documents for accuracy and completeness. If the documents are not complete, <Program Administrator> sends an email to the contractor asking for the missing information. If the missing information is not provided within two weeks, <Program Administrator> will call or send a second email request and give the contractor another two weeks to provide the missing information. If the contractor does not respond, then <Program Administrator> may issue a corrective action report (CAR) to the contractor.

Customer Satisfaction Survey

<Program Administrator> sends a customer satisfaction email survey to each customer following the completion of the project. Customers rate their experience with <Program Administrator> and the authorized contractor. All customers are given the opportunity to provide feedback, and all feedback that is received is anonymized, recorded, and made available in the “rating” column of the contractor search result. <Program Administrator> will not provide names or contact information for any customer that submits feedback. Concerns with any customer comments or ratings should be submitted to <Program Administrator> staff.

Phone and Site Inspections

After <Program Administrator> reviews the documents for completion and accuracy, a certain percentage of projects will be selected for further review. Projects with unusual diagnostic test results or potential discrepancies will be flagged for site inspection. If additional projects need to be inspected to meet the minimum level of site inspections, projects will be selected at random.

Phone or site inspections will occur on two of the contractor’s first ten projects, and then 5 percent of projects thereafter. Initially, <Program Administrator> staff will call the customer to confirm their satisfaction with the work and ask if they would like an onsite visit by staff. <Program Administrator> staff will coordinate the site inspection directly with the building owner.



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<Program Administrator> staff may request additional documentation in advance of a site inspection. This may include documentation of efficiency or equipment sizing, such as <Reference Program TBD> calculations, manufacturer documents, project invoice, or the start-up manual used to calibrate a furnace. Contractors must have these documents on file and supply them within ten days of the request.

During a site inspection, <Program Administrator> staff will perform the following tasks:

- Visually, and through conversation with building owner, verify basic information about the home and the installed equipment.
- Visually confirm that all work identified in work scope has been completed.
- Verify that installation of equipment or materials is satisfactory:
 - Confirm reported efficiency rating of installed equipment, where applicable (evidence of window efficiency must be available at the home for purchase verification or available upon request).
 - Verify that furnace was calibrated appropriately (manufacturer's start up sheet has been completed and left with the building owner or is available from contractor upon request).
- Verify that no unsafe conditions from installed work exist.
- Verify that permits were pulled, if applicable.

For air sealing and insulation projects with diagnostic testing, <Program Administrator> staff will perform the following tasks:

- Visually, and through conversation with building owner, verify basic information about the home and the installed equipment.
- Confirm if the building owner received an audit report (visually inspect if possible).
- Visually confirm that all work identified in work scope has been completed.
- Verify that installation of equipment or materials is satisfactory:
 - Confirm reported efficiency rating of installed equipment, where applicable (evidence of window efficiency must be available at the home for purchase verification or available upon request).
 - Verify that furnace was calibrated appropriately by reviewing the manufacturer's start up sheet, when available.
 - Visually inspect attic insulation to confirm pre- and post- R value of insulation.
 - Inspect other insulation.
- Verify that no unsafe conditions from installed work exist.
- Verify the blower door test-out results.
- Verify that there is no obvious failure to comply with applicable laws, codes, and ordinances, such as providing R value and material for insulation to occupant.

Types of Deficiencies and Corrective Action Reports

All deficiencies identified during quality assurance reviews and inspections will be categorized as safety, workmanship, or programmatic findings based on the guideline provided below. All deficiencies will

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require a corrective action, as indicated on the CAR.

Any repeated deficiencies will be cause for evaluation of contractor program status or dismissal from the program. If objective evidence is not supplied indicating that corrective actions have been addressed, including pictures or other such evidence, <Program Administrator> may require an additional field inspection to verify the completion of the corrective action.

Safety Deficiencies

Safety deficiencies detected during site inspections must be addressed by the contractor within 48 hours of receipt of the CAR, because there is an immediate health and safety risk to the building owner.

Safety deficiencies may include:

- Electric, fire, or structural hazards to occupant that were part of installation
- Failed combustion safety testing results
- Gas leaks
- Improper clearance to combustibles that were part of installation
- Improper pipe wrap installation that creates a combustion hazard
- Serious moisture issues that were not corrected by the installed measures
- Unsafe conditions from installed work that are an immediate risk to occupants
- Violation of the Building Airflow Standard
- Other issues as defined by <Program Administrator> staff during the site inspection

Workmanship Deficiencies

Workmanship deficiencies detected during inspections must be addressed by the contractor within 14 days of contractor receipt of the CAR. Examples of workmanship deficiencies include:

- Failure to follow all applicable laws, codes, and ordinances
- Failure to provide building owner with furnace calibration worksheet (start-up sheet)
- HVAC equipment is improperly installed or not operational
- HVAC system is over- or under-sized by more than 20,000 BTUs when compared to <Reference Program TBD> calculation
- Missing carbon monoxide detector, conforming to Underwriters Laboratory standard 2034,
- Poor workmanship
- Test-out diagnostics incomplete or inaccurate (Example: greater than 10 percent variance between contractor test-out and quality assurance blower door results)
- Unvented combustion appliances defined by the Building Performance Institute as a health and safety issue left in the building
- Other issues as noted by inspector

Programmatic Deficiencies

Programmatic deficiencies are issued by <Program Administrator> during documentation review. Deficiencies must be addressed by the contractor within 30 days of contractor receipt of the CAR.

Examples of

programmatic deficiencies include:



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- Failure to submit COC or specification sheet in a timely manner
- Failure to respond to safety and workmanship CARs
- Financing of nonqualifying measures
- Installation of measure was different than that noted on <Program Administrator> specification sheet
- Installation of eligible measures not recorded on the specification sheet
- Misrepresentation
- Other issues as noted by inspector

Contractor Response to Corrective Action Reports

All inspection noncompliance and/or deficiencies, whether safety, workmanship or programmatic, will be documented on a CAR and transmitted to the contractor. Contractors may be asked to submit a written response to <Program Administrator> indicating how they have implemented the corrective action required, and what steps will be taken to prevent future deficiencies. Failure of the contractor to respond by the time designated on the CAR may result in a change in contractor status. Nonresponsive or late response to a CAR may result in the contractor's suspension or termination. Response times may vary, and contractors should consult the CAR for the response time specific to a given project. General contractor response times to correct a deficiency of installation are shown below. Contractors may be required to implement longer-term measures to prevent further deficiencies in the future, such as staff training.

- **Safety corrective actions:** Must be remedied by the contractor within 48 hours or time noted on CAR.
- **Workmanship corrective actions:** If possible, deficiency must be remedied by the contractor within 14 days. If a remedy is not possible (i.e., the contractor has oversized a furnace) then the contractor may be asked by <Program Administrator> to submit a written action plan to prevent future Deficiencies.
- **Programmatic corrective actions:** If possible, deficiency must be remedied by the contractor within 30 days. If a remedy is not possible, then the contractor must submit to <Program Administrator> a written action plan to prevent future deficiencies. <Program Administrator> is responsible for verifying and approving any corrective actions submitted by the contractor. If CARs are incomplete or do not adequately address the deficiency, the contractor will be notified of the deficiency by <Program Administrator> and required to resubmit the CAR response.

Written Response

CARs include space for contractors to submit a written response to the deficiencies noted by the inspector. Upon request, contractors who receive a CAR should return it with a written response explaining what steps they will take to correct the noted deficiency (short-term corrective actions), as

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well as what steps they will take to ensure that such deficiencies are not repeated (long-term corrective actions). Long-term corrective actions may include changes to a contractor's business procedures and staff, or training for current staff. Objective evidence of corrective actions, such as pictures, training records, and updated procedural manuals, must be supplied for all safety and workmanship CARs and as needed for any minor CARs.

Corrective Action Examples

Example CARs and corrective actions are summarized in Table 6.

Table 6. Corrective Action Examples

Deficiency	CAR Type	Response Time	Root Cause	Short-term Corrective Action	Long-term Corrective Action	Objective Evidence
Gas leaks	Safety	24 hours	Improper installation	Leak repaired within 24 hours of notice	Improved training of technicians	Customer confirmation of repair
Failure to submit COC and specification sheet in a timely manner	Programmatic	30 days	Not familiar with program requirements	Additional staff training	None	Proof of training
Oversizing of HVAC equipment	Workmanship	14 days	Incorrect <Reference Program TBD> calculation	Notice to all staff to perform and document <Reference Program TBD> calculations	None	<Reference Program TBD> software identified, and sample <Reference Program TBD> calculation performed by contractor
Installing ineligible measure	Programmatic	30 days	Not familiar with program requirements	Additional staff training	None	Proof of training



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<Reference Program TBD> calculation not completed	Workmanship	14 days	<Reference Program TBD> calculation not completed by staff	Reminder to staff to complete <Reference Program TBD> calculation for all installations	Installation checklist distributed to staff that includes all steps to be taken when installing a furnace, including sizing furnace with <Reference Program TBD> calculation	Copy of notice to staff and checklist submitted with written response
---	-------------	---------	--	---	--	---

Contractor Participation Status

Contractors who successfully complete one project every 12 months, without any major issues, will remain in good standing. <Program Administrator> staff will evaluate contractor performance on, at least, an annual basis to ensure that contractors continually meet our standards for workmanship and comply with program requirements. <Program Administrator> reserves the right to terminate contractors, who do not meet our quality standards or who repeatedly fail to comply with program requirements.

<Program Administrator> will use best judgment, based on the number and severity of issues, when determining if a contractor's participation in <Program Administrator> should be terminated. Depending on the severity, number, and type, the following noncompliance issues could lead to a contractor's termination.

- Failure to complete one loan every 12 months or failure to pay the \$25 annual fee when a loan is not completed each year
- Failure to follow program guidelines and requirements, including form completion or installation requirements
- Health and safety issue in home resulting from work
- Loss of license or insurance or other requirements
- Misrepresentation
- Convictions or disciplinary action by state or other official body
- At all times, <Program Administrator>, at its own discretion and without reason, retains the right to terminate a contractor from participating in the program.

Customer Inquiries and Complaints



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Customer inquiries or complaints regarding services or equipment installed should be directed to the contractor. <Program Administrator> encourages each customer to research the contractor's work through word of mouth; contractor ratings; customer networks, such as Angie's List; and the Better Business Bureau.

If a customer files a complaint with <Program Administrator> regarding a contractor's performance, workmanship, or professionalism, <Program Administrator> will note the complaint in the contractor's permanent file and take appropriate action. Repeated customer complaints can result in a contractor's suspension or termination from <Program Administrator>. Customer complaints will be flagged and reviewed by <Program Administrator> and may be prioritized for a site inspection. Site inspections do not constitute an effort to resolve any disagreement between the customer and the contractor.

Customers should direct any billing questions to Ashland Electric Utility Billing staff.



METRICS AND REPORTING

The program administrator will monitor the effectiveness and impacts of the on-bill financing program. Key metrics include the following:

- Number of loans
- Loan value (average and total)
- Energy savings (average and total)

The program administrator will have access to information on customer participation, measures installed, and utility savings in accordance with authorizations signed by participating customers. The program administrator and its officers, directors, and agents will take necessary precautions to protect the confidentiality of the customer and contractor information and will only use the information for evaluation and program management purposes.

MARKETING

The program administrator will rely on two primary marketing efforts to promote the on-bill loan program. These two efforts will be spearheaded by Ashland Electric and the program administrator.

The program administrator will provide authorized contractors with a contractor marketing tool kit that stipulates marketing guidelines and resources to help authorized contractors promote the on-bill loan program to customers. The tool kit includes information, such as permitted and required uses of logos and other branding requirements, contractor identification cards, and sample copies of marketing materials. Contractors can also follow the on-bill financing program branding guidelines to develop their own customized marketing materials with the on-bill financing program logo. Any use of Ashland Electric's logo(s) must be requested in writing. Ashland Electric reserves the right to deny and/or terminate a contractor's use of its logo. The program administrator reserves the right to request changes to, or the termination of, any contractor-generated marketing materials that do not meet program or brand guidelines. The contractor bears all changes and associated costs. Contractors can request a review of draft materials, but this is not required.

At no time will the contractor represent its business as an agent or representative of Ashland Electric or <Program Administrator>. Contractors may represent themselves as an authorized contractor. The program administrator does not "certify," "approve," or "qualify" contractors. Any contracts between the contractor and its customers, or any third parties, shall clearly and conspicuously express that no agency relationship exists between the contractor and the program administrator.



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PROCESS TO AMEND THE ON-BILL FINANCING PROGRAM

Ashland Electric seeks to continuously improve the on-bill financing program. Suggestions may be sent to City of Ashland <Staff, Address, Email>. The suggested changes will be reviewed by program staff and may be presented to the program participants for consideration.



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APPENDIX A: ELIGIBLE MEASURES LIST

Appliances	Useful Life (years)
Clothes dryer	14
Clothes washer	11
Dehumidifier	12
Dishwasher	11
Freezer (chest)	21
Refrigerator/freezer	16
Electric vehicle charger	10
Building Envelope	
Air seal can lights	15
Attic/roof insulation	25
Attic hatch insulation	20
Basement wall insulation	25
Cool roofing	20
Crawlspace wall insulation	25
Door (exterior)	20
Door weather-stripping	5
Duct insulation	20
Floor insulation	25
Infiltration reduction (any %)	13
Kneewall insulation	20
Pipe wrap	15
Rim joist insulation	25
Wall insulation	25
Windows	25
HVAC Improvements	
AC (package system)	15
AC (split system)	15
Air source heat pump (ASHP)	15
Duct sealing	18
Heat pump water heater	10
Thermostat	9
Renewable Energy Improvements	
Solar hot water heater	20
Solar PV	20
Other Energy Improvements	
Ceiling fans	15
LED bulbs	15
Whole house fan	15



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Ineligible measures:

The On-Bill Financing program shall not include the following:

- Energy efficiency technologies which are not commercially available.
- Measures that require NEPA review.



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APPENDIX B: SAMPLE LOAN APPLICATION

Below is a sample loan application for the Program. The actual Program loan application would be created and certified by the loan originator for the Program, once all participating utilities agree to program terms and conditions.

Loan Agreement & Disclosure Statement for On-Bill Financing

Home Improvement Installment Contract

Loan date:	Loan number:	Account number:

Borrower	Borrower
Name:	Name:
Address:	Address:

☐ See addendum for additional Borrowers and their signatures

Truth in Lending Disclosure

Annual Percentage Rate	Finance Charge	Amount Financed	Total of Payments
_____ %	\$ _____	\$ _____	\$ _____

Number of Payments	Amount of Payments	Payments Are Due:
_____ of payments	\$ _____ per month See Note under Promise to Pay on page 2.	Payments are due on the same date as your utility bill starting not sooner than 30 days after the Contractor Paid Date

Late Charge: If you do not pay a payment on time, you will owe a late charge in the amount of

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5% of your monthly payment, if your payment is 10 days or more delinquent.

Property
This Agreement is made to finance energy improvements to the Borrowers' property known as: Address: _____

Itemization of Amount Financed

Amount To Be Paid to Program Administrator	Amount To Be Paid To Your Energy Improvement Contractor(s)	Total Amount To Be Advanced
\$ _____	\$ _____	\$ _____

Signatures

By signing as Borrower, you agree to the terms of the Loan Agreement.

CAUTION: IT IS IMPORTANT THAT YOU THOROUGHLY READ THE AGREEMENT BEFORE YOU SIGN IT. DO NOT SIGN THIS AGREEMENT IF THERE ARE BLANKS.

This Agreement is secured by a lien on the property monthly payments that are not paid on time may be added to your tax bill and enforced against the Property through the tax lien foreclosure process in the same manner and with the same priority as the charges for your electric service and real property taxes. The Borrowers who signed this Loan Agreement are all of the owners of the Property.

Dated: __/__/____	Dated: __/__/____
X _____	X _____
Borrower:	Borrower:
Title:	Title:

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Additional Terms

In this Loan Agreement ("Agreement") all references to "we," "our," or "us," mean City of Ashland Electric Utility, whose name appears above and anyone to whom Ashland Electric assigns or transfers this Agreement. All references to "you," or "your," mean each person who signs this Agreement as a borrower.

1. **PROMISE TO PAY.** You promise to pay \$ to Ashland Electric plus interest on the unpaid balance until what you owe has been paid in full. The interest rate is ____ % per year. You agree to pay monthly payments in the amount of \$ _____ per month. Note: the amount of the last payment may be affected by early or late payments. The final payment of the entire unpaid balance of principal and interest will be due at maturity. The maturity date is the date the final payment is due. Any electric rebates will be applied towards the balance of the loan. This does not affect your payment due date or schedule with the exception of your payoff date being sooner.

2. **USE OF LOAN.** The loan proceeds will be used solely to pay for an energy audit of your property and energy improvements by your Energy Improvement Contractor(s), to your Property known as [Address], [City], Oregon [Zip Code]

3. **CONTRACTOR PAID DATE.** This date is the future date in which loan funds are disbursed to your Energy Improvement Contractor(s). This date occurs after all material and work has been satisfactorily completed per your contract with your Contractor and a certificate of completion signed by you is submitted. Amount To Be Paid to <Program Administrator> Amount To Be Paid To Your Energy Improvement Contractor(s): Total Amount to be Advanced \$ \$ \$ Itemization of Amount Financed Itemization of Amount Financed 34

4. **METHOD OF DISBURSEMENT.** We will disburse the cost of the energy audit and the cost of energy improvements to your Energy Improvement Contractor. We will notify you of the disbursement. The total balance of the amounts advanced may not exceed the Amounts Financed set forth on page 1. Payment to your energy improvement contractor are a part of charges for electric service to your property and create a statutory lien on the property.

5. **BORROWERS' REPRESENTATIONS.** You represent to us that:

a. The Borrower(s) who signed this Agreement are all of the owners of the Property and own it in the name of the Borrower(s).

b. You consent to Ashland Electric or any third party originator or servicer sharing information about this loan with Ashland Electric's Board of Directors.

c. You have contracted directly with an energy audit firm to audit and the Contractor to perform energy improvements to your property and agree that Ashland Electric and its third party originators and servicers are not responsible for the audit firm's or Contractor's performance or the quality of their work or performance of any warranty.



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d. You agree that you may not withhold payment on this Agreement for any amounts claimed to be owed to you for any claim against the energy audit firm or Energy Improvement Contractor except to the extent required to be allowed by Oregon consumer protection laws.

e. If you sell or transfer your Property, you will advise the buyer of this Agreement and the on-bill payment obligations.

f. If the Property is or will be used for rental property, you or future owners shall keep the utilities in your name and will not file an affidavit or notice of the Tenant's responsibility for payment of charges for electric services. The filing of such an affidavit shall not affect the ability to add delinquent payments to future tax bills.

g. Borrower has determined that the execution of this Loan Agreement does not violate the terms of any mortgage or land contract signed by Borrower.

6. **PAYMENTS BILLED ON ELECTRIC BILL.** You agree to be billed your monthly payments on your Ashland Electric utility bill in the monthly amount set forth above. The payments shall be a "per meter" charge and shall run with the property. The monthly payment billed by Ashland Electric must be paid in order for it to provide electric service to the Property. Payments will commence with the next monthly Ashland Electric bill after disbursement to your Energy Improvement Contractor and arrangements are completed with Ashland Electric. Payments will be due on the same date as your utility bill starting not sooner than 30 days after the contractor paid date. Payments received by Ashland Electric will be first applied to utility charges for electric, water and sewer, then to other utility charges and then to your loan payments described in paragraph 1.

7. **RECORDING OF MEMORANDUM AND NOTICE OF ON-BILL PAYMENT.** You agree that we may record a Memorandum and Notice of On-Bill Payment signed by you with respect to your Property. The Memorandum will be discharged or terminated by Ashland Electric who is recording a notice of discharge.

8. **PREPAYMENT:** You may pre-pay the amount of principal, interest and other charges owed under this Agreement, in full or in part, at any time without penalty.

9. **DEFAULT.** You will be in default under this Agreement if you do not make a payment of the amount required on or before the date it is due. You will be in default if you break any promise or representation that you made in connection with this loan or if you made any false or misleading statements in your loan application. You will also be in default if something happens that we believe may seriously affect your ability to repay what you own under this Agreement or if you are in default under any other loan agreement you have with us.

10. **ACTIONS AFTER DEFAULT.** When you are in default, we may demand immediate payment of the entire unpaid balance under this Agreement. You waive any right you have to receive demand for payment, notice of intent to demand immediate payment and notice of demand for immediate payment.



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If we demand immediate payment, you will continue to pay interest at rate provided for in this Agreement, until what you owe has been repaid. We may also exercise any other rights given by law when you are in default. You also agree that the payments due under this Agreement may be enforced in the same manner as charges for electric services which may include shut off of electric service to the Property and placing the delinquent amounts on the real property tax bill for the Property. Once placed on the tax bill, the amounts due will be collected in the same manner, and with the same priority as real property taxes and all fees and charges applicable to delinquent taxes will apply.

11. **EACH PERSON RESPONSIBLE.** Each person who signs this Agreement will be individually and jointly responsible for paying the entire amount owed under this Agreement. This means we can enforce our rights against any of you individually or against all of you together.

12. **LATE CHARGE.** If you are late in making a payment, you promise to pay the late charge shown in the Truth in Lending Disclosure. If no late charge is shown, you will not be charged one.

13. **DELAY IN ENFORCING RIGHTS.** We can delay enforcing any of our rights under this Agreement any number of times without losing the ability to exercise our rights later. We can enforce this Agreement against your heirs or legal representatives.

14. **DUE ON SALE** If all or any part of the Premises or any interest in the Premises is sold or transferred without Ashland Electric's prior written consent, Borrower is in default and Ashland Electric may require immediate payment in full of all money then owed under this Agreement. However, this option may not be exercised if it is prohibited by law. If Ashland Electric exercises this option, it shall give Borrower notice of acceleration and Borrower and any unconsented transferee shall pay all such money within 30 days. If not so paid, Ashland Electric may invoke all remedies permitted by this Agreement without further notice or demand.

15. **CONTINUED EFFECTIVENESS.** If any part of this Agreement is determined by a court to be unenforceable, the rest will remain in effect.

16. **NOTICES.** Notices will be sent to you at the most recent address you have given us in writing. Notice to any one of you will be notice to all. In the event that you sell or transfer the Property, you agree that we may send notices and provide information about this Agreement to anyone who acquires an interest in the Property. Notice to Ashland Electric shall be in writing and delivered or mailed by certified mail to the offices of Ashland Electric, at <Address>.

17. **COMPLETE AGREEMENT.** This Agreement is the complete agreement between the parties and supersedes any prior representation, negotiation or agreement between the parties.

18. **AMENDMENTS.** This Agreement may only be amended or changed by an agreement in writing signed by Ashland Electric, any other attempted or alleged amendments or changes shall be void and of no effect.

19. **GOVERNING LAW.** This Agreement shall be governed by the laws of the State of Oregon.

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Information Concerning Energy Improvements Financed under Agreement

Borrowers Name(s): _____

Loan number: _____

Borrower's Contractor 1:

Name: _____

Address: _____

Borrower's Contractor 2:

Name: _____

Address: _____

Borrower's Contractor 3:

Name: _____

Address: _____

Borrower's Contractor 4:

Name: _____

Address: _____



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- a. Cash Price for Energy Improvements, including cost of audit: \$ _____
- b. Insurance or Warranty charge, if any: \$ _____
- c. Amount of official fees, if any: \$ _____
- d. Direct Payment to Contractor by Borrower: \$ _____

Amount of Energy Improvements/Audit Financed: \$ _____

(total of a, b, c, and d, less e)

Description of Energy Improvements:

Energy efficiency home improvements and related services

Notice to Borrower:

- (1) Do not sign this Loan Agreement before you read it.
- (2) You are entitled to a completely filled-in copy of this Loan Agreement.
- (3) Under the law, you have the right to pay off in advance the full amount due and, under certain conditions, to obtain a partial refund of the finance charge.
- (4)) You should require that your Energy Improvement Contractor sign and provide you with a written contract that contains all of the terms of your contract with the Contractor and you should receive a completed copy of it. Do not sign a contract for Energy Improvements if it contains blanks.

I/We acknowledge reading the above Notice and receiving a complete copy of this Agreement by initialing and inserting the date here:

Borrower 1 Signature Date



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Borrower 1 Signature

Date

Ashland Electric Authorized Signature

Date



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Addendum to Ashland Electric Financing Agreement

{For when there are more than 2 Borrowers}

Loan number:

The following additional persons or entities are additional Borrowers on the Ashland Electric Financing Agreement, loan number _____. The undersigned acknowledge receiving a completed copy of the Financing Agreement, pages 1-4 and agree to be bound by its terms as a Borrower.

Borrower #3: _____

Address: _____

Signature: X _____

Title: _____

Dated: _____

Borrower #4: _____

Address: _____

Signature: X _____

Title: _____

Dated: _____



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APPENDIX C: MEMORANDUM AND NOTICE OF ON-BILL PAYMENT AGREEMENT

MEMORANDUM AND NOTICE OF ON-BILL PAYMENT AGREEMENT

THIS MEMORANDUM AND NOTICE OF ON-BILL FINANCING AGREEMENT is made this day of , by and between , , of (the “Owner”) and Ashland Electric of [address of capital provider/lender] Ashland Electric.

WITNESSETH:

WHEREAS, Ashland Electric and the Owner have entered into a Loan Agreement (the “Agreement”) of even date herewith to finance energy improvements to the Property described below with payments billed as a per-meter charge on electric utility bills for the property; and

WHEREAS, the parties desire to enter into this Memorandum to give record notice of existence of the Agreement pursuant to <AMC code reference>.

NOW THEREFORE, for other good and valuable consideration, the Owner and Ashland Electric acknowledge, and the parties give notice that:

1. They have entered into a Loan Agreement to finance energy improvements for the property known as , [City, State, Zip], legally described as follows: Tax Parcel No.: (the “Property”)
2. The Agreement provides for the monthly payments due under the Agreement to be billed on the electric utility bill for the Property in the amount of \$ ____ per month with the last bill due on or before .
3. The on-bill payments are deemed part of the charges for electric services to the property pursuant to <AMC code reference> and thus, are an obligation the runs with the land and the meter for the Property requiring payment in order to obtain electric service to the property.
4. Nonpayment of the electric bill and the loan payments can be enforced in the same manner as nonpayment of other charges for municipal electric services to the property, i.e., by shut-off of electric service or collected as taxes
5. The Agreement provides that the Owner and Owner’s successors must keep the electric utility account in the owner’s name may not file an affidavit of tenant responsibility for any unit of the Property while the Agreement has an outstanding balance.
6. This Memorandum will be discharged only when the Agreement has been paid in full. Information about the Agreement, its terms, or the amount owed can be obtained from Lender at the address set forth above. This instrument is exempt from transfer taxes, because this Memorandum and Notice is not an instrument of sale or transfer of the property but merely gives notice of the Agreement.

{Signatures on next page}



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The parties hereto have executed this Memorandum and Notice on day of , .

Owners: By: ,

Owner By: , Owner [name of capital provider/lender],

Fund By: , its President STATE OF OREGON) COUNTY OF) ss.)

The foregoing instrument was acknowledged before me in County, State of Oregon, this of , , by and , Owners. Notary Public, County, Oregon

My commission expires:

Acting in County, Oregon STATE OF OREGON) COUNTY OF)) ss.

The foregoing instrument was acknowledged before me in County, State of Oregon, this of , , by as President of the [name of capital provider/lender]. Notary Public, County, Oregon

My commission expires:

Acting in <County>, Oregon



City of Ashland has significant experience in administering efficiency measures and seeks RESP funds to expand on the success of current energy loan programs.

Ashland Electric anticipates that the following core staff will be involved in the implementation of the relending program for energy efficiency:

- Adam Hanks, City Manager Pro Tem, City of Ashland
- Tom McBartlett, Electric Director, Ashland Municipal Electric Utility
- Melanie Purcell, Finance Director, City of Ashland
- Bryn Morrison, Administrative Services Manager, Ashland Electric Billing/Finance Departments
- Stu Green, Climate and Energy Analyst, City of Ashland
- Katrina Brown, Assistant City Attorney, City of Ashland

ATTORNEY LETTERHEAD

(Insert date)

Administrator
Rural Utilities Service
United States Department of Agriculture
Washington, D.C. 20250-1500

Subject: Pegasus Solar, LLC "A50" loan

Dear Sir:

I have examined or caused to be examined by competent and trustworthy persons, such corporate records and files and such other records, indexes and files as I have deemed necessary to permit me to render the opinions expressed herein.

I am of the opinion that:

- (a) the Borrower has real or personal property interest(s) (including easements, rights of way or leases) in the counties of _____
_____ in the State(s) of _____,
and _____ mortgage counterparts are necessary for registering and indexing as a real estate mortgage in the appropriate offices in which the Borrower owns real property;
- (b) the Borrower was organized under the laws of the State of _____ as a (corporation/cooperative/other) and it is in good standing as evidenced in the attached Certificate of Good Standing marked as Schedule A hereto;
- (c) attached hereto and marked "Schedule B" is a complete and accurate list of all the real property owned or leased by the Borrower, excluding easements and rights of way;
- (d) the property descriptions contained in the attached exhibit marked as Schedule "B" are legally sufficient in the above specified State(s), in form, substance and copy quality, for inclusion in the granting clause of a mortgage and security instrument creating a lien on such property (Please list any changes from the descriptions of real property in the last security instrument and reasons therefor. Please provide the present market value of all real property acquired and any improvements constructed thereon since the date of the last mortgage.);
- (e) the Borrower's organizational number is _____.
(or the Borrower does not have an organizational number);
- (f) the Borrower is qualified to conduct business in the State(s) of _____
_____;

- (g) the exact true and correct legal name of the Borrower, as stated in the articles of incorporation or in the applicable organizational document(s) is _____;
- (h) the Borrower's corporate debt limit¹ (set in accordance with its articles of incorporation/charter/statute/board resolution or as set forth in the most recent RUS mortgage) is \$_____;
- (i) the execution, delivery and performance by the Borrower of loan documents {would} {would not} require the consent, permission or authorization of {the} {any} government authority entitled _____;
- (j) the borrower's tax payer identification number is _____;
- (k) the borrower has entered into a Power Supply Contract(s), exclusive of amendments, with {Insert name of power supplier}. The power contract is named {enter the complete contract name} and is dated _____;
(Include ALL Contracts including SEPA)
- (l) there are no pending claims or litigation against the Borrower (Otherwise, list any pending litigation, including levels of related insurance coverage and the potential effect on the Borrower on Exhibit B.);
- (m) CHOOSE ONE OF THE FOLLOWING;
- (1) the Borrower has no subsidiary.
- OR
- (2) the Borrower has the following named subsidiary or subsidiaries _____;
- (n) the titles of the officials of the Borrower with the proper authority to execute all loan documents on behalf of the Borrower, and attest to the execution where required, are [President and Secretary (or other applicable titles)].

Very truly yours,

Attachments:

(Good Standing Certificate - marked as Schedule A - Good Standing Certificate)

(Property Schedule - marked as Schedule B - Property Schedule)

¹Note: The mortgage must specify a specific dollar amount for the debt limit. The mortgage may not say "Unlimited" or word(s) of similar meaning.

USDA
Form RD 400-4
(Rev. 11-17)

ASSURANCE AGREEMENT
(Under Title VI, Civil Rights Act of 1964)

FORM APPROVED
OMB No. 0575-0018

OMB No. 0570-0062

The

(name of recipient)

(address)

As a condition of receipt of Federal financial assistance, you acknowledge and agree that you must comply (and require any subgrantees, subrecipients, contractors, successors, transferees, and assignees to comply) with applicable provisions of national laws and policies prohibiting discrimination, including but not limited to:

1. Title VI of the Civil Rights Act of 1964, as amended, which prohibits you from discriminating on the basis of race, color, or national origin (42 U.S.C. 2000d et seq.), and 7 CFR Part 15, 7 CFR 1901, Subpart E.

As clarified by Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency, and resulting agency (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service) guidance, national origin discrimination includes discrimination on the basis of limited English proficiency (LEP). To ensure compliance with Title VI, you must take reasonable steps to ensure that LEP persons have meaningful access to your programs [in accordance with USDA RD LEP Guidance for RD Funded (Assisted) Programs]. Meaningful access may entail providing language assistance services, including oral and written translation, where necessary. You are encouraged to consider the need for language services for LEP persons served or encountered both in developing your budgets and in conducting your programs and activities. For assistance and information regarding your LEP obligations, go to <http://www.lep.gov>;

2. Title IX of the Education Amendments of 1972, as amended, which prohibits you from discriminating on the basis of sex in education programs or activities (20 U.S.C. 1681 et seq.) [as implemented by 7 CFR Part 15, 7 CFR 1901, Subpart E];

3. The Age Discrimination Act of 1975, as amended, which prohibits you from discriminating on the basis of age (42 U.S.C. 6101 et seq.) [as implemented by 7 CFR Part 15, 7 CFR 1901, Subpart E];

4. Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits you from discriminating on the basis of disability (29 U.S.C. 794) [as implemented by 7 CFR Part 15, 7 CFR Part 15b, 7 CFR 1901, Subpart E];

5. Title VIII of the Civil Rights Act, which prohibits you from discriminating in the sale, rental, financing, and advertising of dwellings, or in the provision of services in connection therewith, on the basis of race, color, national origin, religion, disability, familial status, and sex (42 U.S.C. 3601 et seq.), as implemented by the Department of Housing and Urban Development at 24 CFR part 100. The prohibition on disability discrimination includes the requirement that new multifamily housing with four or more dwelling units, i.e., the public and common use areas and individual apartment units (all units in buildings with elevators and ground-floor units in buildings without elevators) be designed and constructed with certain accessible features, see 24 CFR Part 100.201; and

6. Titles II and III of the Americans with Disabilities Act, which prohibit you from discriminating on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain testing entities (42 U.S.C. §§ 12131-12189), as implemented by Department of Justice regulations at 28 C.F.R. parts 35 and 36, and 7 CFR Part 15, 7 CFR Part 15b, 7 CFR 1901, Subpart E.

You also acknowledge and agree that you must comply (and require any subgrantees, subrecipients, contractors, successors, transferees, and assignees to comply) with applicable provisions governing USDA Rural Development (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service) access to records, accounts, documents, information, facilities, and staff :

1. You must cooperate with any compliance review or complaint investigation conducted by USDA Rural Development (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service).
2. You must give USDA Rural Development (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service) access to and the right to examine and copy records, accounts, and other documents and sources of information related to the grant and permit access to facilities, personnel, and other individuals and information as may be necessary, as required by Title VI, Title IX, Age, and Section 504 implementing regulations and other applicable laws or program guidance.
3. You must keep such records and submit to the responsible Department official or designee timely, complete, and accurate compliance reports at such times, and in such form and containing such information, as the responsible Department official or his designee may determine to be necessary to ascertain whether you have complied or are complying with relevant obligations.
4. You must comply with all other reporting, data collection, and evaluation requirements, as prescribed by law or detailed in program guidance.
5. Make available to users, participants, beneficiaries and other interested persons such information regarding the provisions of this agreement and the regulations, and in such manner as the Rural Development or the U.S. Department of Agriculture finds necessary to inform such persons of the protection assured them against discrimination.
6. If, during the past three years, you (the recipient) have been accused of discrimination on the grounds of race, color, national origin (including limited English proficiency), sex, age, disability, religion, or familial status, you must provide a list of all such proceedings, pending or completed, including outcome and copies of settlement agreements.
7. In the event any court or administrative agency makes a finding of discrimination on grounds of race, color, national origin (including limited English proficiency), sex, age, disability, religion, or familial status against you, or you settle a case or matter alleging such discrimination, you must forward a copy of the complaint and findings to USDA Rural Development (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service), Office of Civil Rights.

The United States has the right to seek judicial enforcement of these obligations.

You also acknowledge and agree that you must comply (and require any subgrantees, subrecipients, contractors, successors, transferees, and assignees to comply) with applicable provisions of program-specific nondiscrimination policy requirements found at CFR Part 15, 7 CFR Part 15 b, 12 CFR Part 202, 7 CFR 1901, Subpart E., DR4300-003, DR4330-0300, DR4330-005.

Period of Obligation

In the case of any service, financial aid, covered employment, equipment, property, or structure provided, leased, or improved with federal assistance extended to the Recipient by Rural Development (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service), this assurance obligates the Recipient for the period during which federal assistance is extended. In the case of any transfer of such service, financial aid, equipment, property, or structure, this assurance obligates the transferee for the period during which federal assistance is extended. If any personal property is so provided, this assurance obligates the Recipient for the period during which it retains ownership or possession of the property. In all other cases, this assurance obligates the Recipient for the period during which the federal assistance is extended to the Recipient by Rural Development (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service).

Employment Practices

Where a primary objective of the federal assistance is to provide employment or where the Recipient's employment practices affect the delivery of services in programs or activities resulting from federal assistance extended by Rural Development (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service), the Recipient agrees not to discriminate on the grounds of race, color, national origin, sex, age, or disability, in its employment practices. Such employment practices may include, but are not limited to, recruitment, advertising, hiring, layoff or termination, promotion, demotion, transfer, rates of pay, training and participation in upward mobility programs; or other forms of compensation and use of facilities.

The Recipient agrees to compile and maintain information pertaining to programs or activities developed as a result of the Recipient's receipt of federal assistance from Rural Development (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service). Such information shall include, but is not limited to the following: (1) the manner in which services are or will be provided and related data necessary for determining whether any persons are or will be denied such services on the basis of prohibited discrimination; (2) the population eligible to be served by race, color, national origin, sex, age, and disability; (3) data regarding covered employment including use or planned use of bilingual public contact employees serving beneficiaries of the program where necessary to permit effective participation by beneficiaries unable to speak or understand English; (4) the location of existing or proposed facilities connected with the program and related information adequate for determining whether the location has or will have the effect of unnecessarily denying access to any person on the basis of prohibited discrimination; (5) the present or proposed membership by race, color, national origin, sex, age and disability in any planning or advisory body which is an integral part of the program; and (6) any additional written data determined by Rural Development (Rural Housing Service, Rural Business and Cooperative Service, and Rural Utilities Service) to be relevant to the obligation to assure compliance by recipients with laws cited in this assurance agreement.

Rights and remedies provided for under this agreement shall be cumulative.

(S E A L)

*Recipient*Date

Attest:

Title

Title



**Certification Regarding Drug-Free Workplace Requirements (Grants)
Alternative I – For Grantees Other Than Individuals**

AD-1049

The following statement is made in accordance with the Privacy Act of 1974 (5 U.S.C. § 552a, as amended). This certification is required by the regulations implementing §§ 5151-5160 of the Drug-Free Workplace Act of 1998 (Pub. L. 100-690, Title V, Subtitle D: 41 U.S.C. § 8101 et seq.), and 2 C.F.R. Parts 182 and 421. The regulations were amended and published on June 15, 2009, in 74 Fed. Reg. 28150-28154 and on December 8, 2011, in 76 Fed. Reg. 76610-76611. Copies of the regulations may be obtained by contacting the Department of Agriculture agency offering the grant.

According to the Paperwork Reduction Act of 1995 an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0505-0027. The time required to complete this information collection is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The provisions of appropriate criminal, civil, fraud, privacy, and other statutes may be applicable to the information provided.

(Read instructions on page three before completing certification.)

A. The grantee certifies that it will or will continue to provide a drug-free workplace by:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;
2. Establishing an ongoing drug-free awareness program to inform employees about –
 - a. The dangers of drug abuse in the workplace;
 - b. The grantee's policy of maintaining a drug-free workplace;
 - c. Any available drug counseling, rehabilitation, and employee assistance programs; and
 - d. The penalties that may be imposed upon employees for drug-abuse violations occurring in the workplace.
3. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph A.1.
4. Notifying the employee in the statement required by paragraph A.1 that, as a condition of employment under the grant, the employee will –
 - a. Abide by the terms of the statement; and
 - b. Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;
5. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph A.4.b from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;
6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph A.4.b, with respect to any employee who is so convicted –
 - a. Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
 - b. Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or, local health, law enforcement, or other appropriate agency;

7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs A.1 through A.6.	
B. The grantee may insert in the space provided below the site(s) for the performance of work done in connection with the specific grant:	
PLACE OF PERFORMANCE (Street Address, City, County, State, Zip Code)	
Check ☐ if there are workplaces on file that are not identified here.	
ORGANIZATION NAME	PR/AWARD NUMBER OR PROJECT NAME
NAME(S) AND TITLE(S) OF AUTHORIZED REPRESENTATIVE(S)	
SIGNATURE(S)	DATE

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint \(https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer\)](https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442.

Instructions for Certification

- (1) By signing and submitting this form, the grantee is providing the certification set out on pages one and two in accordance with these instructions.
- (2) The certification set out on pages one and two is a material representation of fact upon which reliance is placed when the agency awards the grant. If it is later determined that the grantee knowingly rendered a false certification, or otherwise violates the requirements of the Drug-Free Workplace Act, the agency, in addition to any other remedies available to the Federal Government, may take action authorized under the Drug-Free Workplace Act.
- (3) Workplaces under grants, for grantees other than individuals, need not be identified on the certification. If known, they may be identified in the grant application. If the grantee does not identify the workplaces at the time of application, or upon award, if there is no application, the grantee must keep the identity of the workplace(s) on file in its office and make the information available for Federal inspection. Failure to identify all known workplaces constitutes a violation of the grantee's drug-free workplace requirements.
- (4) Workplace identifications must include the actual address of buildings (or parts of buildings) or other sites where work under the grant takes place. Categorical descriptions may be used (e.g., all vehicles of a mass transit authority or State highway department while in operation, State employees in each local unemployment office, performers in concert halls or radio studios).
- (5) If the workplace identified to the agency changes during the performance of the grant, the grantee shall inform the agency of the change(s). If it previously identified the workplaces in question, see paragraph (3) above.
- (6) Definitions of terms in the Nonprocurement Suspension and Debarment common rule and Drug-Free Workplace common rule apply to this certification. Grantees' attention is called, in particular, to the following definitions from these rules:
 - "Controlled substance" means a controlled substance in Schedules I through V of the Controlled Substances Act, 21 U.S.C. § 812, and as further defined by 21 C.F.R. §§ 1308.11-1308.15.
 - "Conviction" means a finding of guilt (including a plea of nolo contendere) or imposition of sentence, or both, by any judicial body charged with the responsibility to determine violations of the Federal or State criminal drug statutes.
 - "Criminal drug statute" means a Federal or non-Federal criminal statute involving the manufacture, distribution, dispensing, use, or possession of any controlled substance.
 - "Employee" means the employee of a grantee directly engaged in the performance of work under a grant, including: (i) all "direct charge" employees (ii) all "indirect charge" employees unless their impact or involvement is insignificant to the performance of the grant and, (iii) temporary personnel and consultants who are directly engaged in the performance of work under the grant and who are on the grantee's payroll. This definition does not include workers not on the payroll of the grantee (e.g., volunteers, even if used to meet a matching requirement, consultants or independent contractors not on the grantee's payroll, or employees of subrecipients or subcontractors in covered workplaces).



Certification Regarding Debarment, Suspension, and Other Responsibility Matters Primary Covered Transactions

AD-1047

The following statement is made in accordance with the Privacy Act of 1974 (5 U.S.C. § 552a, as amended). This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, and 2 C.F.R. § 180.335, Participants' responsibilities. The regulations were amended and published on August 31, 2005, in 70 Fed. Reg. 51865-51880. Copies of the regulations may be obtained by contacting the Department of Agriculture agency offering the proposed covered transaction.

According to the Paperwork Reduction Act of 1995 an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0505-0027. The time required to complete this information collection is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The provisions of appropriate criminal, civil, fraud, privacy, and other statutes may be applicable to the information provided.

(Read instructions on page two before completing certification.)

A. The prospective primary participant certifies to the best of its knowledge and belief, that it and its principals:

1. Are not presently debarred, suspended, or proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (A.2.) of this certification; and
4. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.

B. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

ORGANIZATION NAME	PR/AWARD NUMBER OR PROJECT NAME
NAME(S) AND TITLE(S) OF AUTHORIZED REPRESENTATIVE(S)	
SIGNATURE(S)	DATE

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint \(https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer\)](https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442.

Instructions for Certification

- (1) By signing and submitting this form, the prospective primary participant is providing the certification set out on page 1 in accordance with these instructions.
- (2) The inability of a person to provide the certification required below will not necessarily result in denial of participation in this covered transaction. The prospective participant shall submit an explanation of why it cannot provide the certification set out on this form. The certification or explanation will be considered in connection with the department or agency's determination whether to enter into this transaction. However, failure of the prospective primary participant to furnish a certification or an explanation shall disqualify such person from participation in this transaction.
- (3) The certification in this clause is a material representation of fact upon which reliance was placed when the department or agency determined to enter into this transaction. If it is later determined that the prospective primary participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency may terminate this transaction for cause or default.
- (4) The prospective primary participant shall provide immediate written notice to the department or agency to which this proposal is submitted if at any time the prospective primary participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- (5) The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549, at 2 C.F.R. Parts 180 and 417. You may contact the department or agency to which this proposal is being submitted for assistance in obtaining a copy of those regulations.
- (6) The prospective primary participant agrees by submitting this form that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency entering into this transaction.
- (7) The prospective primary participant further agrees by submitting this form that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion - Lower Tier Covered Transactions," provided by the department or agency entering into this covered transaction, without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
- (8) A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the System for Award Management (SAM) database.
- (9) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- (10) Except for transactions authorized under paragraph (6) of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency may terminate this transaction for cause or default.

LOBBYING CERTIFICATION

Statement For Loan Guarantees And Loan Insurance

The undersigned states to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.

Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, Title 31, U. S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Organization Name

Name of President, President

Name of Authorized Official

Signature

Date of Board Meeting

Date

(Print on Borrower's Letterhead)

FEDERAL DEBT DELINQUENCY CERTIFICATION

IS THE APPLICANT DELINQUENT ON ANY FEDERAL DEBT? _____ YES X NO

Note: Example of debts include, but are not limited to, delinquent taxes, guaranteed or direct government loans (more than 31 days past due) and other administrative debts.

If Yes, provide explanatory information.

APPLICANT CERTIFICATION
FEDERAL COLLECTION POLICIES FOR COMMERCIAL DEBT

The Federal Government is authorized by law to take any or all of the following actions in the event that a borrower's loan payments become delinquent or the borrower defaults on its loan: (1) Report the borrower's delinquent account to a credit bureau; (2) Assess additional interest and penalty charges for the period of time that payment is not made; (3) Assess charges to cover additional administrative costs incurred by the Government to service the borrower's account; (4) Offset amounts owed to the borrower under other Federal programs; (5) Refer the borrower's debt to the Internal Revenue Service for offset against any amount owed to the borrower as an income tax refund; (6) Refer the borrower's account to a private collection agency to collect the amount due; and (7) Refer the borrower's account to the Department of Justice for litigation in the courts.

All of these actions can and will be used to recover any debts owed when it is determined to be in the interest of the Government to do so.

Certification

I have read and understand the actions the Federal Government can take in the event that I fail to meet my scheduled payments in accordance with the terms and conditions of my agreements.

Signed: _____

Title: _____

Company: _____

Date: _____

ORS 287A.150

Authority of public body to issue revenue bonds

- [Text](#)
- [Annotations](#)

(1)

In addition to any other authority to issue revenue bonds, a public body may authorize revenue bonds by resolution or nonemergency ordinance pursuant to this section for a public purpose.

(2)

If revenue bonds are authorized by nonemergency ordinance, a public body may not sell the revenue bonds pursuant to this section until the period for referral of the ordinance has expired. If electors of a public body refer a nonemergency ordinance authorizing issuance of revenue bonds, the public body may not sell the revenue bonds unless the electors approve issuance of the revenue bonds.

(3)

If revenue bonds are authorized by resolution:

(a)

A public body may not sell the revenue bonds until at least 60 days following publication of the notice required in subsection (4) of this section.

(b)

The resolution must provide that electors residing within the public body may file a petition with the public body asking the public body to refer the question of whether to issue the revenue bonds to a vote. If within 60 days after the publication of the notice described in subsection (4) of this section, electors file petitions with the public body containing valid signatures of at least five percent of the public body's electors, the public body:

(A)

Shall place the question of issuing the revenue bonds on the ballot at the next lawfully available election date; **and**

(B)

May not sell the revenue bonds described in the notice unless a majority of the electors voting on the question of issuing the revenue bonds approve.

(4)

A public body authorizing revenue bonds by resolution shall publish a notice describing the purposes for which the revenue bonds will be sold in at least one newspaper of general circulation within the boundaries of the public body in the same manner as other public notices of the public body. At a minimum, the notice must contain:

(a)

The date the resolution was adopted and the number thereof, if any;

(b)

The expected source of revenue for repayment of the revenue bonds;

(c)

The estimated principal amount of the revenue bonds to be sold;

(d)

The procedures by which electors may cause the question of issuing the revenue bonds to be referred to a vote;

(e)

The period within which electors must file signed petitions to cause referral; **and**

(f)

The fact that the resolution is available for inspection at the appropriate office of the public body.

(5)

If revenue bonds are authorized by nonemergency ordinance under subsection (2) of this section, the revenue bonds may be secured by the revenues or other property of the public body that is described in the nonemergency ordinance. If revenue bonds are authorized by resolution under subsection (3) of this section, the revenue bonds may be secured by the revenues or other property of the public body that is described in the notice required under subsection (4) of this section.

(6)

A public body may issue refunding bonds under [ORS 287A.360 \(Current refunding bonds\)](#) to [287A.380 \(Tax levy to pay maturing general obligation advance refunding bonds\)](#) to pay revenue bonds that were authorized by this section. The procedures and limitations of subsections (1) to (5) of this section do not apply to refunding bonds. [2007 c.783 §46]

ORS 271.390

Lease or purchase of real estate by public body or council of governments

- financing agreement
- [Text](#)
- [Annotations](#)

(1)

As used in this section:

(a)

“Council of governments” means a council of governments or other similar entity created prior to the enactment of [ORS 190.010 \(Authority of local governments to make intergovernmental agreement\)](#) (5) on September 29, 1991.

(b)

“Public body” has the meaning given that term in [ORS 287A.001 \(Definitions for ORS chapter 287A\)](#).

(c)

“Real or personal property” means land, improvements to land, structures, fixtures, personal property, including furnishings, equipment and computer software purchases and licenses, and any costs that may be capitalized under generally accepted accounting principles and treated as costs of personal property.

(2)

A public body or a council of governments may enter into contracts for the leasing, rental or financing of any real or personal property that the governing body of the public body or council of governments determines is needed, including contracts for rental, long term leases under an optional contract for purchase, financing agreements with vendors, financial institutions or others, or for purchase of any property. Contracts made by a public body or a council of governments are subject to the terms of its charter, intergovernmental agreement or other organizing document, if applicable. If authorized by the governing body, the contracts may:

(a)

Provide that the obligations of the public body or council of governments under the contract is secured by a mortgage on or other security interest in the property to be leased, rented, purchased or financed under the contract.

(b)

Provide that the obligations of the public body or council of governments under the contract are payable out of all or any portion of lawfully available funds of the public body or council of governments, and lawfully available funds may be pledged to the payment of those obligations.

(c)

If authorized by the charter, intergovernmental agreement or other organizing document of the public body or council of governments, contain a covenant on the part of the public body or council of governments to budget and appropriate in each fiscal year, in accordance with law, sums sufficient to pay when due the amounts owing under the contract.

(d)

Provide for the issuance of certificates of participation in the payment obligations of the public body or council of governments under the contract and contain other covenants, agreements and provisions determined to be necessary or appropriate in order to better secure the obligations of the public body or council of governments.

(3)

The lien of the pledge, mortgage or security interest is valid and binding from the time of entering into the contract. The revenue or property is immediately subject to the lien without physical delivery, filing or other act, and the lien is superior to all other claims and liens of any kind whatsoever. Subject to the terms, provisions and limitations of the contract, the lien may be foreclosed by a proceeding brought in the circuit court of the county in which the public body, or the greater part thereof, or the main office of the council of governments is located, and any tangible real or personal property subject to the lien may be sold upon the order of the court. The proceeds of the sale must be applied first to the payment of the costs of foreclosure and then to the amounts owing under the contract, with any balance being paid to the public body or council of governments. The authority granted by this section is in addition to, and not in lieu of, any other statutory or charter authority.

(4)

A public body or council of governments that has entered into a lease purchase or installment purchase agreement may enter into a financing agreement to refinance the obligations of the public body or council of governments under the lease purchase or installment purchase agreement.

(5)

The estimated weighted average life of a financing contract executed under this section may not exceed the estimated dollar weighted average life of the real or personal property that is financed with the contract. [Amended by 1995 c.333 §2; 1997 c.171 §7; 1999 c.559 §1; 2003 c.195 §8; 2005 c.443 §3; 2007 c.783 §89]



Council Business Meeting

Date: December 3, 2024

Agenda Item	Affordable Housing Trust Fund Reallocation Request: Sunstone Housing Collaborative
From	Brandon Goldman, Director of Community Development, Linda Reid, Housing Program Manager
Contact	brandon.goldman@ashland.or.us, linda.reid@ashland.or.us

SUMMARY

On April 16, 2024, the City of Ashland awarded \$55,000 in Affordable Housing Trust Funds (AHTF) to Sunstone Housing Collaborative to support the purchase of Ashland School District property for the development of an affordable housing project. Since Sunstone is no longer pursuing the purchase of the property, they have requested that these funds be reallocated to cover predevelopment costs. Specifically, the funds would support architectural services for creating a master plan and developing a Request for Proposals (RFP) to identify a development partner for affordable and middle-income housing on the site. These activities align with the original goal of developing affordable housing on School District-owned land. However, due to the significant shift in the proposed use of funds, staff directed Sunstone to formally request City Council approval, as this reallocation falls outside the scope of changes staff can approve administratively.

POLICIES, PLANS & GOALS SUPPORTED

Ordinance 2966 [Chapter 4.36 Ashland Municipal Code](#). This ordinance established the Affordable Housing Trust Fund, defining its purpose and the framework for its administration. It specifies that the AHTF is a separate account used exclusively for purposes consistent with the ordinance and implementing resolutions of the Council.

Resolution 2008-34: This resolution provides the administrative procedures for the AHTF, detailing the policies and procedures for the distribution of funds. It outlines the eligible uses and activities for the AHTF, including those that facilitate the production and preservation of affordable housing within Ashland's Urban Growth Boundary.

According to these governing documents, any significant change in the use of awarded AHTF funds—such as reallocating from land acquisition to predevelopment services—requires approval from the City Council. This ensures that the proposed activities align with the AHTF's objectives and comply with established policies and procedures.

BACKGROUND AND ADDITIONAL INFORMATION

At its regular business meeting on April 16, 2024, the City Council approved an award of \$55,000 from the Affordable Housing Trust Fund (AHTF) to Sunstone Housing Collaborative to assist with land acquisition. The original application requested funding to subsidize the cost of purchasing a parcel of School District-owned land, which would subsequently be offered to an affordable housing provider through a competitive Request for Proposals (RFP) process. The intent was to reduce the land cost for the affordable housing provider while ensuring the Ashland School District received full market value for the property. At the time, the School District faced a budget shortfall and was unwilling to sell the land for less than its appraised value.

Staff recommended this funding based on its alignment with AHTF goals, including facilitating the development of deed-restricted affordable housing to meet the City's long-term affordability objectives. By subsidizing land acquisition costs, the funding would help ensure the development of housing to benefit households with documented income needs, while maintaining a timeline to produce affordable housing.

Sunstone Housing Collaborative has since requested a reallocation of the \$55,000 award to now be used in support of predevelopment activities, which are also eligible under the policies governing the AHTF. According to City of Ashland Resolution 2008-34, eligible uses of AHTF funds include activities that:





Council Business Meeting

- **Support nonprofit housing developers** by providing funds for predevelopment expenses such as financial packaging, architectural design, and project planning.
- **Facilitate the creation and maintenance of affordable housing** through preparatory actions that establish the groundwork for development.

The proposed predevelopment activities—architectural services for a master plan, consultant services for housing development, and the creation of an RFP—fall within these eligible uses. Developing a comprehensive master plan and soliciting proposals from qualified development partners will enable the creation of deed-restricted affordable housing that meets community needs, aligns with income-level targets, and ensures compliance with long-term affordability standards. As such, reallocating the funds supports the overarching goals of the AHTF while addressing the practical needs of advancing the project.

The Housing and Human Services Advisory Committee (HHSAC) met on November 14, 2024, to review Sunstone Housing Collaborative's request to reallocate the \$55,000 Affordable Housing Trust Fund grant from land acquisition to predevelopment activities. After discussion, the committee unanimously voted to recommend that the City Council approve the revised reallocation of funds as presented. This recommendation reflects the committee's assessment that the proposed use aligns with the goals and eligible uses of the Affordable Housing Trust Fund.

FISCAL IMPACTS

The City of Ashland awarded Sunstone an Affordable Housing Trust Fund Grant, which has been budgeted in the current biennium, and the proposed change in fund use will have no additional financial impact. Should the Council approve the reallocation of the AHTF grant to support the Sunstone Housing Collaborative's predevelopment activities as requested, these funds can immediately be used to reimburse predevelopment expenses incurred by Sunstone Housing Collaborative.

Separately, the City provisionally awarded Community Development Block Grant (CDBG) funds for the 2024 Program Year to Sunstone Housing Collaborative for land acquisition. The CDBG award had to be provisional because at the time of application there was no eligible activity to fund. However, Sunstone Housing Collaborative is no longer pursuing acquisition of the property, which would have been an eligible use of CDBG funds. The City Council discussed reallocation of this CDBG provisional award on November 19, 2024. Council directed staff to schedule a requisite CDBG public hearing before the Housing and Human Services Advisory Committee to reallocate the prior year CDBG allocation to complete eligible upgrades to the public facility at 2200 Ashland Street in support of an Inclement Weather Shelter. The CDBG award is not part of the discussion at this evening's meeting, as the current request pertains solely to the reallocation of the \$55,000 AHTF funding available.

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

The Council may choose to fully reallocate the \$55,000 provisional Affordable Housing Trust Fund award as requested, or decline to reallocate the funds, reserving them for eligible City activities or competitive award in the future competitive AHTF allocation process.

I move to approve the reallocation of \$55,000 in Affordable Housing Trust Funds awarded to Sunstone Housing Collaborative from property acquisition to predevelopment costs, including architectural services, consultant services in support of affordable housing development, and the development of a master plan and Request for Proposals.

REFERENCES & ATTACHMENTS

1. Sunstone AHTF Transfer Request – Atch 1
2. Sunstone AHTF Application Question Response – Atch 2
3. Sunstone- Arkitek Agreement dated Sept52024 - Atch 3
4. Sunstone – HDC Service Agreement dated Oct 232024 – Atch 4





Council Business Meeting

5. Sunstone -OCDC MOU dated Oct302024 – Atch 5
6. Sunstone Press Release dated Nov62024 – Atch 6
7. Sunstone RFP issued Nov62024 – Atch 7





To assist staff and the City Council in evaluating how this reallocation from land acquisition by a non-profit affordable housing provider to predevelopment activities and an open RFP will further the fund's goals—specifically in the provision of deed-restricted affordable housing accessible to households within specific income levels—please find the following detailed explanation addressing:

1. **Alignment with AHTF Objectives:** How will the proposed pre-development activities (e.g., architectural services and the issuance of a Request for Proposals) contribute to the long-term objective of creating deed-restricted affordable housing that benefits households by income level?

Sunstone's request is a variant from the original application. However, it remains aligned with two of the stated uses of the AHTF: (Source: [City of Ashland Website AHTF Information Page](#))

Creation and maintenance of affordable housing

Support for nonprofit housing developers: Providing pre-development funds to secure land and assist with financial packaging, housing design, and management

The City of Ashland Website also states: "Because HTFs are created locally using public revenues, they should be structured to address priority issues in a community. For example, funds initially can be targeted to fix up vacant homes for homeownership opportunities, and later shifted to address other needs. **This flexibility in design is one of the most attractive features of a housing trust fund.**"

Creating a master plan for a permanently affordable, mixed-income housing development is fundamental to aligning the interests and meeting the objectives of the AHTF because it provides a structured, long-term vision that guides development. A well-crafted master plan and RFP integrates key elements like universal design, income diversity, affordability, and community needs—ensuring that each aspect is thoughtfully addressed from the outset.

The master plan helps create a clear pathway for assembling development partnerships focused on achieving permanent affordability, making it possible to build housing that remains accessible to a diverse group of residents over time. By defining and illustrating the priorities of desired housing type, design, affordability requirements and other necessary inclusions (such as onsite childcare), it can ensure a balanced community where people from various economic backgrounds can live together, promoting inclusivity and social cohesion. Furthermore, with a focus on supporting increased

school enrollment, the plan considers the educational needs of families and the vitality of the local school district, creating a stable foundation for future growth.

By setting these priorities in advance, a master plan minimizes risks, streamlines decision-making, and ensures that the values of all stakeholders—including developers, residents, community leaders, and policymakers—are integrated, respected, and upheld as the project progresses.

Pursuing an open RFP process before finalizing land acquisition is essential because it allows for a transparent and competitive selection of proposals, ensuring that the chosen development partners are best equipped to meet project priorities put forth by the Ashland School District, the City of Ashland and the community. By opening the process prior to land acquisition, Sunstone can evaluate different approaches, gather innovative ideas, and select a partner whose vision aligns closely with the master plan. This proactive approach also ensures that the final development is both viable and supported by the community, fostering trust and commitment among all vested parties.

2. **Income-Level Beneficiary Details:** Information on the anticipated income levels of households who will benefit from the proposed development, along with any projected outcomes or measures to ensure affordability compliance.

Sunstone anticipates assembling a development team with the capacity to address the complexities of producing a mixed income housing community. Income levels to be addressed include 80-120%AMI as well as 80% AMI and below. Also anticipated is a combination of rental and affordable homeownership options for residents. As outlined in the Master Plan and RFP, it is imperative for developer team respondents to present funding and organizational strategies that will ensure the resulting housing remains affordable in perpetuity. This may include targeted funding sources such as OHCS, affordable housing construction loans, partnering with a community land trust, resident housing vouchers or private investors. Technical advisory support throughout the RFP selection process, provided by the Housing Development Center, will contribute vital expertise in determining the viability of proposed strategies.

3. **Predevelopment Activity Documentation:** As the request includes predevelopment activities anticipated to be completed before the upcoming City Council meeting on December 3rd, please include detailed documentation of the architectural services (masterplan) and RFP issuance efforts to date. This will allow the Council to understand the foundational work supporting your affordable housing plans.

Architectural services (masterplan) and RFP issuance efforts to date:

- **Comprehensive Master Plan (Draft):** Developed in partnership with Arkitek Architecture and Design, this plan will provide a strategic foundation for the project, integrating key priorities such as universal design, affordability, and community needs.

- Established MOU with [Oregon Child Development Coalition](#) as anticipated provider for co-located childcare within the development (requirement included in RFP)
- **RFP Composition and Issue:** The Request for Proposals (RFP) was crafted and issued November 6 with technical support from HMK and the Housing Development Center, ensuring a clear, structured framework for informing and evaluating potential development partners.
- Signed agreement with [Housing Development Center](#) to provide technical assistance throughout the RFP issuance and developer team selection process.
- RFP Pre-Proposal Meeting (attended by 48 interested parties) held Nov. 12, 2024
- **RFP Proposal Submission and Assessment:** Proposals in response to the RFP are due by December 2nd at 10 a.m., with an assessment process planned for December 2-4 in preparation for interviews on December 7, 2024

Supporting Documentation:

[Original AHTF Application with modifications](#) according to current request in [blue](#)

[Agreement with Arkitek and scope of work for Master Plan](#)

[Housing Development Center Technical Assistance Agreement](#)

[HDC Technical Assistance Agreement: Fee Agreement](#)

[Memorandum of Agreement with Oregon Child Development Coalition](#)

[Sunstone RFP Release and Response Schedule](#)

[Sunstone Press Release for Issue of RFP](#)

[RFP + Master Plan](#)

Sunstone Housing Collaborative

ASD Housing Project Timeline

**November 2024-
Spring 2025**

RFP Issued 11/6/2024	Mandatory Pre-Proposal Meeting for potential applicants 11/12/2024	Deadline for RFP Questions and Clarifications 11/25/2024	Deadline for Proposals 10am 12/3/2024	Continued community engagement and development support
• Master Plan 3/4 complete, ready to communicate development and design standards • Continued community engagement efforts to inform selection process.	• 3-5pm at RVML 1757 Ashland St, Ashland, OR 97520 • Project orientation and questions • In attendance: SHC staff and board, HDC Rep, OCDC Rep, ASH Rep	• Inquiries for clarification or additional information must be received by 2pm on this date	• Scoring of Proposals December 3-6, 2024 • Interviews held 12/7/2024 with option for 12/10 • 3 options with recommendation presented to ASD Board 12/16/2024 • Notification of intent to award 12/20/2024	• Address community feedback and questions • Provide communication and administrative support for development partners • Finalize Master Plan

Ashland Housing Trust Fund Application
(Edited to contain information regarding transfer request)

Sunstone Housing Collaborative

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

Sunstone Housing Collaborative was established in December 2023 to support the educational mission of Ashland School District and the associated Housing Production Strategy of Ashland by facilitating the transfer and sale of district owned land to develop affordable housing intended for district staff and low to moderate income families with children in order to increase long term sustained enrollment and retain staff members. To achieve this goal, Ashland School District has identified a parcel of land within city limits and approved that land to be sold to one or more nonprofit low income housing developers. A working agreement will be made with ASD for Sunstone Housing to facilitate the sale of the land with the expectation that market value will be received by the district upon transfer. It is highly likely that a nonprofit housing developer will seek to purchase the land BELOW market value, therefore it is the focus of this application that Sunstone Housing Collaborative seeks funding through the Ashland Housing Trust Fund to offset a lower sale price and ensure that Ashland School District receives expected revenue for the land. Upon initial application date, Sunstone did believe that this was the best and highest use for grant funds in order to further the completion of this housing project. However, as time passed between application (February) and grant year beginning (July), Sunstone made significant progress in acquiring a greater understanding of the needs and possibilities of the project. This work has led to determining that at this point, when funds are being made available, the best and highest use is for payment to Arkitek Design and Architecture for the completion of a Master Plan which will best communicate the scope of the development requirements to developers who respond to the RFP in November 2024.

2. Project Description

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

This initial project of Sunstone Housing Collaborative is focused on partnering with Ashland School District in facilitating the sale and development of district owned land in order to build affordable multifamily housing. This project serves ASD in creating accessible housing for families to live in as their children attend Ashland public schools and it also meets the needs for affordable housing stated in the City of Ashland's Housing Production Strategy. As the number of households with children declines, the need for creative solutions to ensure Ashland remains a community of all ages, becomes more imperative.

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

Families with children, and individuals earning between 50-120% AMI

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

An estimated 100 households will benefit from the development of housing on the determined 4 acres of land.

- If applicable provide the number and type of housing units to be created or made habitable.

Exact data to be provided in response to RFP, however we will require that the RFP respondents include approximately 100 units of housing that may include a combination of apartments, townhomes, manufactured homes or cottages.

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

March 2024: RFP Release with 60 day response window

May-June 2024: Evaluate and choose developer

July-August 2024: Community engagement initiatives

September-December 2024: Break ground

November 6, 2024: RFP Issue

November 12: Mandatory Pre-Proposal Meeting

November 25, 2pm: Deadline for Questions/Clarifications

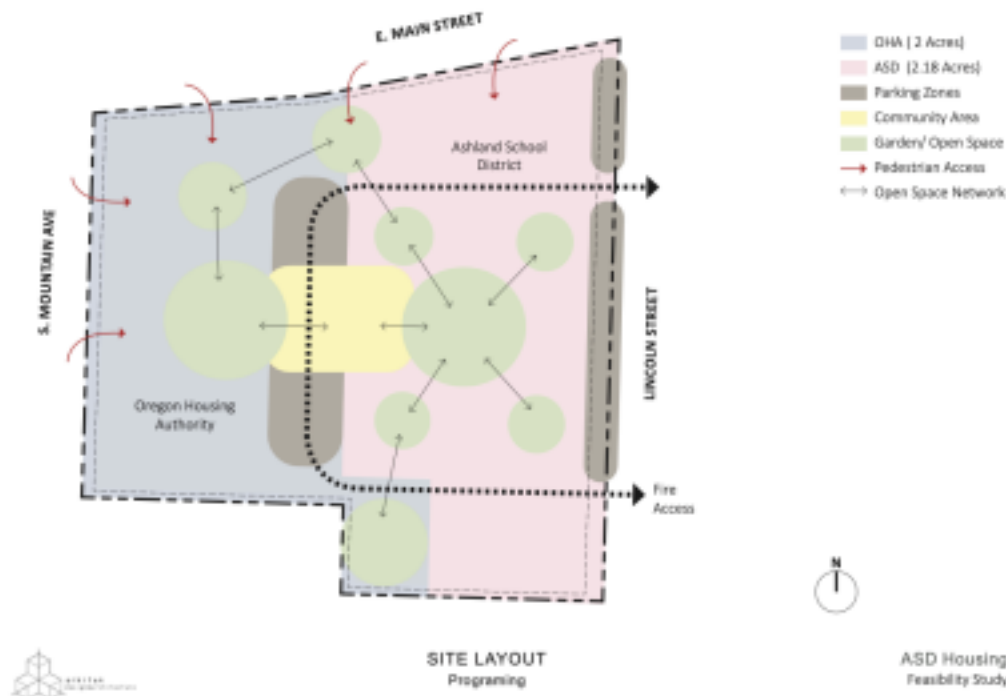
December 2, 10am: Deadline for Applications

December 2-4: Scoring of Proposals

December 7: Interviews

December 20: Notification with Intent to Award

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



3. Project Experience

- **Describe the respondent's organizational framework, special resources, and any other information to demonstrate that the City of Ashland Ashland Housing Trust Fund RFP 2024 respondent can effectively and efficiently complete the proposed program/activity.**

Sunstone Housing Collaborative has built a partnership with the Ashland School District to secure an initial build site on the property currently owned by the district at E. Main and S. Mountain Ave in Ashland. This location ensures the opportunity for future residents to benefit from living in housing that is affordable, in proximity to public transportation, schools, and local employment; all factors that promote a thriving community.

While the advisory board for Sunstone Housing Collaborative is currently in process of being assembled, there remains oversight by the Ashland School District board of directors in order that their interests are being met throughout this process.

The executive director is an individual with experience in community organization working with churches and city government to streamline services for people experiencing homelessness, is trained as an Occupational Therapy practitioner, as well as having a passion to pursue partnerships which establish and nurture housing justice.

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

The sale and development of this initial 4 acres of ASD land will be the inaugural project for Sunstone Housing. We will integrate and apply the experience and expertise from the consultancy and collaboration with other well established organizations who have completed similar projects with success. [Sunstone has contracted with Housing Development Center to provide technical assistance for the RFP issuance and response. The creation of the Master Plan by Arkitek will provide necessary guidance for the process to ensure that the full scope of the development requirements are understood by potential applicants.](#)

- **List other organizations involved with this project and their level of involvement.** Ashland school board is fully supportive of the sale and development of the land at E. Main and Mountain, as it supports the goal of potentially increasing enrollment as well as providing reliable affordable housing for ASD staff.

4. Funding Request

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

\$100,000.00

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

Applied for but not yet approved for \$143,660 CDBG

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

Estimated market value of 4 acres of land at E. Main and Mountain: \$3million [estimated \\$2million](#)

Minimum estimated purchase price by developer/ RFP respondent: \$2million [minimum estimate \\$1.5mil](#)

Estimated difference in revenue to be raised by grants, including CDBG, Ashland SS Grant, Allcare grant,

Wells Fargo community development grant, Ford Foundation Grant and Ashland Housing Trust Fund:
\$1million [estimated difference: \\$500k](#)

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

Given other sources of grant monies received and applied for, as well as volunteer/donated time to facilitate the coordination of this project, the Affordable Housing Trust Fund contribution will at most contribute 10% total required cost. [Estimated percentage covered by AHTF: .18%](#)

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

Please see attached



Krista Palmer
Sunstone Housing Collaborative
1467 Siskiyou Blvd #79
Ashland, OR 97520

September 6, 2024

Dear Krista and Members of the Sunstone Board,

We submit this proposal for the Sunstone Housing Collaborative with excitement for the potential this project holds. Our team is committed to designing and planning a living environment that will provide access, utilization, and most importantly a home for those within the Ashland community. We will implement a creative approach towards a collaborative effort in finding solution in the built environment with simplicity and function at the forefront as we develop a universally accessible community that is unique to Ashland.

Included in this proposal is our scope of services, timeline, and fee. We plan to establish and incorporate the principles of Universal Design as fundamental to the design process and essential in creating a space for belonging that benefits and empowers all without discrimination. The process starts by listening to community needs and desires before creating design options; identifying what is needed in the built environment to make the space welcoming for everyone; and developing an understanding of the barriers that affect access to housing for each unique user group.

We appreciate your review of our enclosed proposal and are fully committed to the success of the Sunstone project. We have prepared this proposal to the best of our ability, and welcome the opportunity to further discuss with you any adjustments that may be needed to align with your expectations. Thank you again for the opportunity.

Kind Regards,

A handwritten signature in black ink, appearing to be "CB" followed by a stylized flourish.

Christopher Brown and the Arkitek Team

A. Scope of Work

- a. Kickoff and coordination (2 months)
 - i. Kickoff meeting with Sunstone to refine project goals and brainstorm needs and desires
 - ii. Outreach with non profit organizations and community members to brainstorm needs and desires
 - iii. Analysis of on-site and off-site conditions
 - iv. Prepare base drawings
- b. Draft Master Plan & Design Standards (2 months)
 - i. Develop universal design standards packet
 - ii. Precedent boards
 - iii. Development of MP design options (up to 3) of site layout and architectural and landscape concepts
 - iv. Meeting with Sunstone to review the design concepts and discuss
 - v. Meeting & feedback from non profit organizations and community members to review the design concepts and discuss
- c. Master Plan (1 month)
 - i. Revised Schematic MP design/consolidate options into 1 design
 - ii. Committee/Stakeholder Meeting or Open House
 - iii. 3D graphics and final master plan document

B. Timeline

- a. The project would begin by coordinating between Sunstone and the design team to determine the overall schedule for the project.

C. Cost of Services

- a. We propose to execute the above services for the lump sum of **\$45,000** to be billed monthly, based on percentage complete. Any additional services will be billed at hourly rates (\$150 for principals; \$125 for designers; and \$65 for associates).

D. Assumptions and Exclusions

- a. All graphics and drawings prepared will be provided to Sunstone as PDFs as well as hard copies.
- b. We are assuming that Sunstone will want to assemble a committee and/or stakeholder group for design review. We can discuss if these meetings are held separately from Sunstone or in conjunction.



524 E Burnside Street, Ste 210
Portland, OR 97214
503-335-3668
HDC-NW.ORG

HOUSING DEVELOPMENT CENTER, INC.

A technical advisory service in support of low-income and special-needs housing

REQUEST FOR SERVICES – Ashland School District Housing Technical Assistance

This **REQUEST FOR SERVICES** is dated October 23, 2024 and is entered into pursuant to the Technical Assistance Agreement between Housing Development Center (“HDC”) and Sunstone Housing Collaborative (**“Client”**) dated October 23, 2024.

1. Client Agent. For this Project, the Client’s Agent shall be **Krista Palmer**.
2. HDC Representative. For this Project, the HDC Representative shall be **Travis Phillips**.
3. Fee Cap. Without Client’s prior written approval, the amount of the fee for the Project described below shall not exceed **\$5,000**. The fee cap shall only apply to fees generated by hourly rates and not to reimbursable expenses or interest. Client understands and agrees that by capping its fee, HDC is not agreeing that the Project can be completed for an amount equal to or less than the not-to-exceed fee set forth above.
 - 3.1. At this time, in person meetings at Client location are not contemplated. If requested by Client, HDC will provide an estimate for fee and reimbursable expenses, if any, that are anticipated to be incurred for this purpose. Meetings at Client location may impact the ability to achieve the anticipated scope within the Fee Cap identified above.
4. Feasibility. HDC makes no warranty that the Project is feasible or that it can obtain sufficient financing sources to fund the Project.
5. Authority. HDC has no authority to bind or execute documents on behalf of Client.
6. Commencement of Project. The work on the Project shall commence immediately.
7. Completion of Project. The work on the Project shall be completed by HDC no later than **March 1, 2025**. Notwithstanding the foregoing, if the HDC’s work on the Project cannot be completed as a result of *force majeure*, a client request to put a hold on further work on the Project, or as a result of Client’s failure to meet its responsibilities under this the Technical Assistance Agreement or this Request for Services, the date for completion of the HDC’s work on the Project shall be reasonably extended.
8. Client’s Responsibilities. In addition to the Client’s Responsibilities set forth in Section 3 of the Technical Assistance Agreement, Client shall also be responsible for the following:

- 8.1. Compliance with Ashland School District requirements or any requirements of Project funding obtained without HDC's involvement.
- 8.2. Obtaining Ashland School District of other Board approvals for the Project, including approvals (if needed) for issuance of the RFP, selection of RFP respondents, or other Project requirements.
9. Scope of Services. The Project under this Request for Services shall be as set forth on Attachment A.

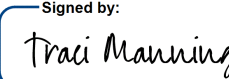
SUNSTONE HOUSING COLLABORATIVE

An: Oregon nonprofit corporation

By: 
C132F18CE41A471...
Krista Palmer
Executive Director

HOUSING DEVELOPMENT CENTER

An: Oregon nonprofit corporation

By: 
35D3F0CF84C80413...
Traci Manning
Executive Director

ATTACHMENT A TO REQUEST FOR SERVICES

Technical Assistance for Residential/Mixed-Use Project RFP

1. Project Name: Ashland School District Housing.
2. Property Location (Site).
S. Mountain Avenue and S. Main Street
Ashland, OR 97520
Jackson County
3. Site Description. The site is a mostly rectangular, relatively flat property bordered by three streets (S. Mountain Avenue, S. Main Street and Lincoln Street) that has historically been used as the Ashland High School athletic field.
4. Anticipated Program. The Ashland School District Housing Project is currently envisioned to include multifamily affordable rental housing (apartments), townhouses and cottages for rent and/or homeownership opportunities, primarily with a focus on family housing and ideally with mixed income opportunities. Additionally, the development is envisioned to have private and shared open space, community garden space, and a community building to include childcare and/or early childhood development facilities.

The scope of this Request for Services is limited to Technical Assistance for the Client's Request for Proposals (RFP) for a Developer to support the Anticipated Program described above. Additional or subsequent services may be addressed by an amendment to this Request for Services (RFS) or a separate RFS.

5. Project Coordination
 - 5.1. General. As it relates to the Client's RFP, provide information to the Client with respect to the normal and regular issues of real estate development of a residential housing development with an affordable rental component and potential mixed-income and homeownership components, including clearly identifiable risks, compliance issues, market changes, financing climate, and anticipated obligations.
 - 5.1.1. Provide information to Client to assist in ensuring Client's goals and priorities are clearly communicated in the RFP and, where possible, ensure opportunity for RFP responses to offer creative solutions to meet Client's goals and priorities.
 - 5.1.2. As requested by client, assist in responding to any questions asked by prospective RFP respondents and documenting questions and answers for all prospective respondents.
 - 5.1.3. Assist in documenting meeting agendas and notes and providing a draft of potential next steps after RFP selection.
 - 5.1.4. Notify Client in the event that HDC believes that any such requirements cannot be met due to identified Project parameters.
 - 5.2. General Technical Assistance Services: As it relates to the Client's RFP, provide information to the Client with respect to the normal and regular issues of design, entitlements and construction of the type of Project described in Section 5.1 including financing structures and contractual obligations.

5.3. Meetings. Meet weekly or as necessary to coordinate team during feasibility. Meetings shall be via video or phone conference or in person at HDC offices. HDC shall advise and assist Client in connection with all matters and questions from other parties pertaining to HDC and HDC's Work. HDC shall coordinate with Client and any consultants or representatives of Client at each stage of the Project for review and approval before proceeding to a subsequent stage.

6. Project Team:

6.1. Team Member Identification and Solicitation. As it relates to the RFP, and as requested by Client, assist in identification and engagement of development team members ("Project Team") to include in RFP solicitation with experience related to the Anticipated Program for the Project, including members such as a developer, architect, general contractor, other consultants, or a team proposed with a combination of any or all of these members.

6.2. Evaluate Team. As requested by Client, assist in developing evaluation criteria, identifying potential evaluation panel members, and assist in evaluating the qualifications of proposing Project Team(s) and/or Team Member(s) and the feasibility of any identified or proposed development scenarios based on information submitted in their response to the Client's RFP.

End of Attachment A



Oregon Child Development Coalition (OCDC) and Sunstone Housing Collaborative Memorandum of Agreement

This Agreement constitutes a mutual understanding between the Oregon Child Development Coalition (OCDC) and Sunstone Housing Collaborative, (collectively the "Parties"). Sunstone Housing Collaborative is developing low-income housing with the intention of having co-located Early Childhood Education and Care (ECEC) services (on land owned by the Ashland School District).

Due to OCDC's experience in quality ECEC services, building projects, and experiences with low-income housing co-locating, Sunstone Housing Collaborative and OCDC would like to collaborate on the colocation of childcare services for this project and agree to work together as the project progresses. The roles and responsibilities will be outlined and updated as the project progresses.

OREGON CHILD DEVELOPMENT COALITION
Donalda Dodson, Executive Director

Sunstone Housing Collaborative:
Krista Palmer, Executive Director:

Signature: *Donalda Dodson*
Donalda Dodson (Oct 30, 2024 11:25 PDT)

Signature: *Krista Palmer*

Date: 30/10/24

Date: 10/24/2024

Press Release



Sunstone Housing Collaborative to Issue RFP for Developers

Affordable Housing Development in Partnership with Ashland School District

Ashland, Oregon. November 6, 2024

Community nonprofit organization, Sunstone Housing Collaborative issues a Request for Developers on behalf of Ashland School District. The proposed new housing will bring much needed affordable housing to Ashland, benefitting the school district's families and staff.

- Property is 4 acres, to be sold at market value
- Estimated 91 units of permanently affordable rental and ownership
- Partnership with Oregon Child Development Coalition for on-site childcare

"In a time when food scarcity, income disparity, and housing insecurity are on the minds of families throughout our community, this housing project reveals the depth of belief and love for our families. Whether they are teachers, staff or part of the community workforce, we want every family who wishes to live, work, and raise their children in Ashland to afford living here. With this housing project we are emphasizing our commitment to retain existing staff and teachers in order to further the tremendous long term tradition of excellent public schools." ASD School Board Vice Chair, Jill Franko

RFP Issue slated for November 6, 2024. Mandatory pre-proposal informational meeting on Tuesday, November 12, 3-5 pm at Rogue Valley Metaphysical Library 1757 Ashland Street, Ashland, Oregon. Virtual attendance option will be available.

Press Contact:

Krista Palmer
Executive Director
krista@sunstonehc.org

Sunstone Housing Collaborative

1467 Siskiyou Blvd #79
Ashland, Oregon 97520
(541) 210-8675

www.sunstonehc.org

Sunstone Housing Collaborative

Request for Proposal for
Development Team
for the
Ashland Attainable Housing Project
79 Lincoln Street,
Ashland, OR 97520

Issue Date: November 6, 2024

Mandatory Pre-proposal Meeting: November 12th, 2024,
3:00PM (local time)

Questions Due: November 25th, 2024, 2:00PM

Due Date/Time: December 2, 2024, 10:00AM

LATE PROPOSALS WILL NOT BE ACCEPTED

INTRODUCTION

Sunstone Housing Collaborative (“Sunstone”) is a nonprofit organization assembled to develop the Ashland Attainable Housing Project (“Project”). Sunstone Housing Collaborative was established in December 2023 to support the educational mission of Ashland School District and the associated Housing Production Strategy of Ashland by creating community partnerships to develop mixed-income housing targeted to district staff as well as families with children. Sunstone is committed to providing housing and services for low-median income households of the Ashland community.

Sunstone Housing Collaborative issues this Development Team Request for Proposal (“RFP”) to obtain funding, design, permit, and construct a residential community that provides attainable, income-restricted rental and homeownership options. The selected development team will be expected to participate in an integrated process including but not limited to the assembly of funding applications, architectural plans (schematic designs, bid sets and final construction plans and specifications), project scheduling, value analysis, construction sequencing and the procurement of subcontractors, suppliers, project architect, engineers and inspectors. The development team will include a project architect, project manager, construction manager and general contractor at minimum.

Interested parties should provide a response as indicated below by **10:00 AM local time on Monday December 2, 2024**. This RFP includes a brief project description, prequalification requirements, as well as submission information below. We understand that this is a complex project and welcome any questions to assist interested parties in submitting a qualified proposal.

Project Goals

Sunstone is seeking a developer who will generate a Development Team to create an attainable housing project that meets the goals Sunstone has for Ashland’s community. Sunstone is looking for a developer with a vision for the project, and that understands or is interested in integrating a community, uplifting low-moderate income teachers, and families with children. We want our Developer to be experienced, open to answering questions and be collaborative as this is our first housing project. We want to keep our residents at the top of mind in all the work that we will do to create and build this project and having a Developer that understands that is important to us. The Developer will advise the team during the pre-development phases and coordinate and manage the construction of the project as a member of the Project Development Team. The Developer should be familiar with teacher or other occupationally-preference housing.

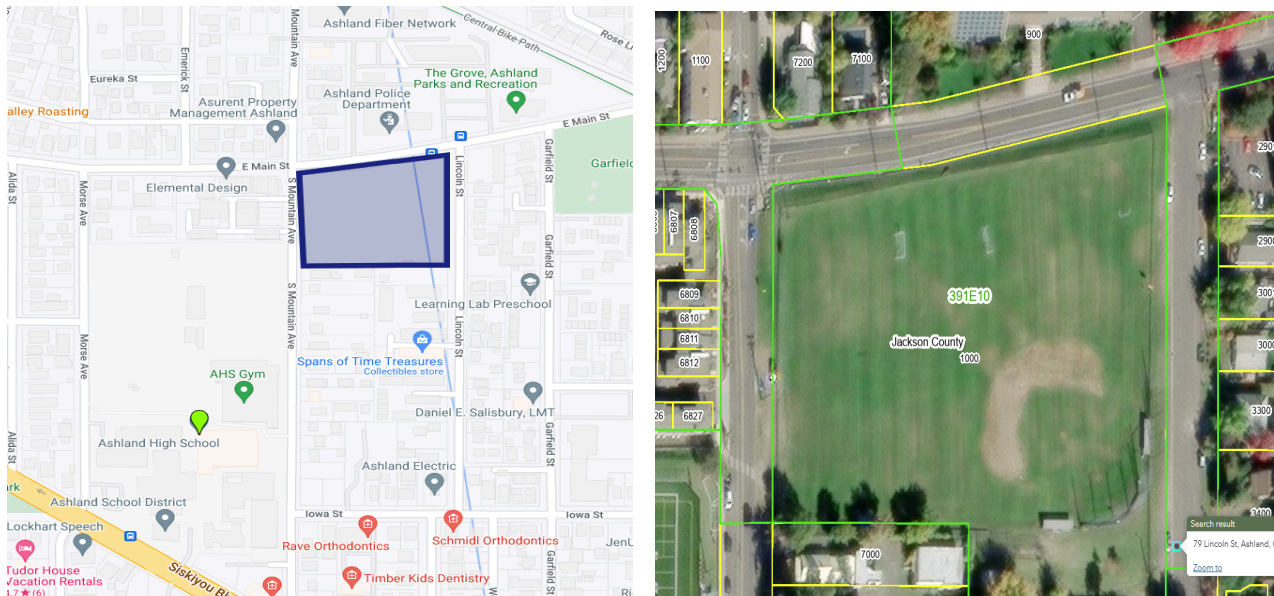
This unique project is intended to serve multiple purposes, including, but not limited to developing ninety units minimum of varying multi-family housing types (apartments, townhouses, cottages), sized from studio to three bedrooms. The Project intends to serve residents with income restrictions and families. Unit affordability will be split with <80% AMI

(area median income) and 80-120% AMI. The Project will offer community spaces as presented in the Master Plan to include, but are not limited to childcare, playground, classrooms/community space, community garden, offices, resident services, and rooftop gardening. The development will be fully fire sprinklered. Site and landscape work will include keeping as many trees as possible.

Project Background

The proposed building site located between Mountain Avenue and Lincoln Avenue has historically been used as the Ashland High School athletic field. Due to the intermittent nature of its use, a potential opportunity to address the growing needs for community and District housing is being discussed. This innovative and important project is intended to be a public-private partnership wherein Sunstone and the selected developer shall collaborate to develop a residential project that provides much needed attainable housing for prospective year-round residents. Imbalanced housing costs limit the options for households with children, our local workforce, and Ashland residents are often marginalized. As a result, Sunstone, supported by the Ashland School District, seeks to partner with a developer and other local government entities to develop an innovative model of housing that meets the needs of those impacted by the attainable housing void.

SITE INFORMATION



Basic Property Information

Client/Owner: Ashland School District 885 Siskiyou Boulevard, Ashland, OR 97520

Map & Tax lot: 39-1E-10-1000

Authorities Having Jurisdiction (AHJ): City of Ashland

Acreage: 4.18 AC (182,081 SF)

Zoning: R-3 (Multiple Family)

Notable Overlay Zones: Hillside lands – slopes >25%

Land

The District owns 4.18 acres of land along Main Street, between South Mountain Avenue and Lincoln Street near Ashland High School, located at 79 Lincoln Street. This is one lot but could be divided into any combination that would mix housing of 80-120% AMI and 80% and below.

Development

Located at 79 Lincoln Street, Ashland, the Ashland Attainable Housing Project will develop safe and attainable housing and support to individuals and families in Jackson County. On 4.18 acres, the proposed development will be located on an underutilized athletic field and will include housing, community spaces, offices, and parking. The integration and continuity of the community is important to Sunstone in developing a welcoming inclusive space that addresses multiple needs.

Attached in the addendum is the Master Plan created by Ashland Architect, Chris Brown from Arkitek. Our intention is to find a partner(s) that can follow, as closely as possible, the general plan outlined in the plan.

Additional Project Objectives

- Property can be developed by one or more developers at mixed income for the entire four acres, or in part according to Master Plan requirements.
- Phased implementation plan
- Innovative models given preferential consideration such as land trust homeownership, co-housing, long-term lease and other suggested forms of housing from the [City of Ashland Housing Production Strategy](#).
- Project is required to meet Oregon sustainability standards. Innovative building methods and other sustainability upgrades and features should all be explored (LEED, Earth Advantage, solar, stormwater, greywater, local materials, climate readiness).
- Options for community spaces on site as presented in the Master Plan (childcare, playground, classrooms/community space, community garden, offices, resident services, rooftop gardening).
- Ashland Attainable Housing development will include various housing types, community spaces, playground, childcare center, and gardening plots.

- Site improvements such as utility extensions, new sidewalks, parking, driveways, greenspace, courtyard, on-site storm detention and additional landscape work are included in this development.
-

SCOPE OF SERVICES

Developer

Ashland Attainable Housing Project seeks a developer to provide full services including concept development, recruitment, and coordination of the design team; securing project funding; and project management during construction through close out. There is flexibility regarding when work needs to start, but Sunstone wants the project to be ready to submit competitive funding applications in early 2025.

A successful Development Team, either through in-house or sub-consultants, shall provide Sunstone with professional services in the following areas:

- Architecture
- Civil Engineering
- Cost Estimating
- Construction Administration
- Electrical Engineering
- Geotechnical
- Landscape Architecture
- Mechanical and Plumbing Engineering
- Site Planning
- Structural Engineering
- Survey

The sale of the property is expected to be conducted using a Disposition and Development Agreement negotiated with Ashland School District through Sunstone, which will describe the conditions for releasing the Property for construction of the proposed housing. It is envisioned that the Project will purchase the entire property from the Ashland School District at Fair Market Value, although Developer(s) may propose alternate sale conditions for Sunstone and Ashland School District consideration.

Overview of Required Services

The Developer(s) will procure a development team that will include, but is not limited to, a construction project manager (CM), general contractor (GC), project architect (PA), finance project manager (FM), and other consultants as necessary (collective, "Development Team").

Construction Project Manager/General Contractor (CM/GC)

The CM/GC will be skilled in developing schedules, preparing construction cost estimates at the schematic design, design development and construction document stages, performing value engineering, analyzing alternative designs, costs and constructability issues, studying labor conditions, understanding construction methods and techniques, and coordinating and communicating these activities throughout the design and construction phases to all members of the Development Team. In addition, the CM/GC shall be familiar with the local labor and subcontracting market. Depending on the funding sources obtained, the Project may be subject to prevailing wages and/or workforce hiring, apprenticeship, and training requirements. The CM/GC should be familiar with BOLI, Davis-Bacon and other prevailing wage requirements and procedures. Union labor may also be applicable to this project.

The following provides an outline of services to be provided by the CM/GC:

Pre-Construction Services: Pre-Construction services will be performed by the selected CM/GC anticipated to be under an AIA-based agreement to be negotiated with the Owner utilizing an AIA A133 Contract Form including AIA A201. During the Pre-Construction Phase, the CM/GC will work with the Development Team to analyze the design and recommend modifications for improving constructability and saving construction time and cost. It is anticipated that the CM/GC will join the Development Team at the Schematic Design phase.

The CM/GC will review the design and construction documents for constructability and prepare a formal list of comments to be reviewed and coordinated with Sunstone and the Development Team. The sequence of construction and efficient use of construction materials and labor will be considered. The CM/GC will enlist Subcontractor participation to determine material lead times and tolerances. As the CM/GC will review the documents for constructability, conformance to the estimate and readiness for bid, efforts should be made to identify potential errors and omissions, and to communicate these concerns to the Project Architect.

A problem resolution procedure with clear responsibility assignments must be developed by the Development Team. Review of documents by the CM/GC as they evolve is a highly valuable means of detecting design errors. Since the CM/GC will be reviewing the documents for constructability, conformance with the estimate, and readiness for bid packaging, design errors and/or omissions should also be caught during these reviews.

Scheduling: The Development Team, led by PA, will produce an initial Scope of Work which will include a preliminary design and development schedule. This schedule will show each of the programming and design phases, identify critical milestone dates, and note what decisions are needed to be made by Sunstone. The CM/GC will work closely with the Development Team to finalize the schedule to show activities necessary to complete all aspects of the design requirements and all construction activities through the issuance of a final certificate of occupancy. The CM/GC will utilize their experience and available Subcontractor input to determine long lead items and critical path tasks for completion of the Project in the allotted time frame. The CM/GC will implement a computerized, cost-loaded scheduling system for use during the pre-construction and construction phases.

Cost Estimating: At a minimum, the CM/GC will provide full Project cost estimates at the end of the Schematic Design, Design Development phase, and at 50% Construction Document completion. The CM/GC will provide recommendations to the Development Team for keeping costs within the Project budget, value engineering recommendations, life cycle costs, and periodic updates to the cost estimate throughout the pre-construction phase. The CM/GC will utilize their experience and available Subcontractor input to verify the CM/GC's estimates for major building systems and will establish budget line items for portions of Work for which the design is not complete.

Constructability Review: The CM/GC will review the design and construction documents for constructability and prepare a formal list of comments to be reviewed and coordinated with Sunstone and the Development Team.

Bidding and Contract Negotiation: In cooperation with Sunstone and the Development Team, the CM/GC will establish a GMP for the construction contract. The CM/GC will establish and implement a process to solicit competitive Subcontractor bids for all the Work in conformance with local and state requirements. Any savings the CM/GC realizes in performing the public improvement contract will accrue to Sunstone unless the contract provides otherwise. The bid process will be designed to encourage maximum participation by Minority-, Women-owned, and Emerging Small Businesses (MWESBs), Service Disabled Veteran Business Enterprises (SDVBEs), or local business enterprises, subcontractors, vendors, and labor resources. The CM/GC is expected to meet or exceed funding requirements for MWESB/SDVBE participation, such as goals included in Oregon Housing and Community Services' MWESB Compliance Manual.

Construction Period: The CM/GC will complete the Work according to the construction documents. The schedule for the Project will be guaranteed by the contract between Sunstone and the CM/GC. The subcontracts will be between the CM/GC and the subcontractors. The contract and/or subcontracts will contain liquidated damages provisions, in the event of late completion. The CM/GC shall be required to document and track construction waste management, CM/GC will be responsible for ensuring that Subcontractors document and track the required information.

The CM/GC shall hold construction meetings and shall prepare Progress reports, including but not limited to photos, construction schedule, and financial summaries that are to be distributed to all recipients on a schedule agreed upon by Sunstone and Development Team.

The CM/GC shall prepare a comprehensive permitting management schedule to support the administration of the project's "critical path" schedule. The CM/GC shall also be responsible for obtaining and administering necessary Permits and Testing and Inspections for project Work outlined in the Scope of Work.

Project Close-Out: Before final inspections, Sunstone and Project Architect will create a punch list that will be provided to CM/GC. The CM/GC will maintain all relevant Project archive records on behalf of Sunstone including but not limited to, as-built drawings, specifications, submittals, inspection reports and related information. Upon completion of construction, the CM/GC will provide Project record drawings, field order, and change order records, technical submittals,

testing and inspection reports and operating manuals to Sunstone. The CM/GC's submittals will be assembled in an organized fashion and turned over to the appropriate Sunstone representative. Where commissioning requires operating performance of the completed facility to specified levels, these shall be measured and documented with Sunstone and appropriate Development Team members present.

The CM/GC will prepare an Operations and Maintenance Manual that outlines the Owner's responsibilities to ensure that the Warranty remains valid. The Maintenance Manual is an invaluable asset to the property's maintenance personnel and will assist in the development of a preventive maintenance program. It is also an opportunity to clarify manufacturer and vendor warranty provisions as well as the CM/GC's responsibilities.

The GC will be expected to:

- Be skilled in developing schedules.
- Provide pre-construction cost estimating services. Cost estimates are anticipated due at 100% Schematic Design for funding submittals, 100% Design Development, 50% Construction Documents, and an update at 100% Construction Documents.
- Perform value engineering.
- Analyze alternative designs, costs, and constructability issues.
- Be familiar with the labor laws, the local labor and subcontracting market and prevailing wage requirements.
- Understand construction methods and techniques.
- Coordinate and communicate these activities to the Project Team through the entire project.
- Coordinate with Owner's consultants, such as Geotech, fenestration testing, structural special inspections, etc.
- Ensure public safety throughout construction.
- Be familiar with and understand funding requirements during all phases of a project.
- Meet or exceed MWESB/COBID and Workforce training, apprenticeship, and training goals, as determined by funding sources.
- Participate in weekly or bi-weekly meetings, in person and remote.

Additional Requirements

- No Proposal for CM/GC services related to this Project shall be received or considered by Sunstone unless the Proposer has a current, valid certificate of registration issued by the Construction Contractors Board.
- Contract format is anticipated to be:
 - The pre development phase will be an agreement between the general contractor and Sunstone.
 - A (modified by agreement) A101-2017 / A201-2017 for the remainder of the project.

Project Architect

Experience and Expertise

The successful Project Team, with a preference for in-house or sub-consultants with a physical presence in the Ashland and/or Jackson County area, shall exhibit recent and relevant experience and expertise in the following areas:

- Multi-family and/or single-family new construction
- Assessment of existing conditions for the site.
- Working in a team configuration with Sunstone's Developer, the Construction Manager/General Contractor, and Owner.
- Mechanical and electrical design.
- Green building and sustainable practices with a focus on building and energy performance.
- Experience with completing work in phases.
- Expert knowledge of current applicable codes, including, and not limited to:
 - Oregon Residential, Structural, Energy, Mechanical and Plumbing Specialty Codes
 - Jackson County requirements.
- Cost estimating.
- Preparation of necessary design and construction documentation to facilitate the cost estimating by the Construction Management/General Contractor
- Construction Administration.

Specific Services Requested

Project Architect will be responsible for providing the following services, while ensuring the project stays on schedule and within budget. Typical services include, but are not limited to:

A. Programming Phase

The Project Architect will confirm the project program, scope of work and schedule for Sunstone's approval. In addition, the Project Architect will advise Sunstone of the scope and nature of any laboratory or field tests, inspections, or investigations which the Project Architect recommends for proper planning and design of the project. Sunstone will work in conjunction with the Developer and Project Architect to procure the necessary services to complete the agreed upon tests, inspections, and investigations. After written approval from Sunstone of the project design and Schedule, the Project Architect will commence the development of the Schematic Design package.

B. Schematic Design Phase

Upon written approval of the Programming Phase, the Project Architect will provide a Schematic Design package including but not limited to:

- Site Plan showing existing site and infrastructure, parking, circulation (both pedestrian and vehicular), site drainage and landscaping.
- Analysis of existing conditions including infrastructure systems, landscape, and drainage.
- Summary of all tests, inspection, and investigation reports.
- Outline specifications sufficient to define quality of materials intended.
- Preliminary cost estimates covering all work designed or specified by the Development Team.
- Code and regulation analysis.

- Necessary documentation required by Sunstone to facilitate applications for funding.

C. Design Development Phase

Upon written approval from Sunstone of the Schematic Design package, the Project Architect will commence with the preparation of a Design Development package including but not limited to:

- Drawings and specifications sufficient to illustrate project scope including site, building, landscape, and engineering drawings.
- Additional documentation required for cost estimate analysis by Construction Management/General Contractor.
- Preliminary recommendations for construction phasing.

D. Construction and Contract Documents Phase

After written approval from Sunstone of the Design Development Documents, the Project Architect shall prepare Construction and Contract Documents. These documents shall include but not limited to:

- Plans and drawings
- General Conditions
- Technical Specifications
- Additional documentation as required by the CM/GC to update cost estimation.

E. Construction Administration and Post Completion and Warranty Phase

After written approval from Sunstone of the Construction and Contract Documents, the Project Architect will review schedules, product submittals, shop drawings for conformance with the Construction Documents, monitor quality, progress of the work, and advise Sunstone on project related issues. After execution of the Certificate of Completion by Sunstone, the Project Architect shall consult with and make recommendations to Sunstone during the warranties period and perform inspections as scheduled after construction is complete.

F. Capital Replacement Planning

Project Architect may be asked to work with Sunstone to prepare a capital replacement plan, including design and specifications for future replacements and improvements to the property.

Minimum Requirements

To be qualified to respond, firms must possess at least five (5) years of recent and relevant experience. In addition, the selected firms must not be debarred, suspended, or otherwise ineligible to contract with Sunstone, and must not be included on the General Services Administration's "List of Parties Excluded From Federal Procurement and Non-Procurement

Programs” or the Department of Housing and Urban Development’s “Limited Denial of Participation” list.

DEVELOPMENT PROCESS

Sunstone, subject to approval of the Ashland School District Board, will be the sole judge in determining award of contract and reserves the right to reject any or all Proposals including the requirements and will access applications based on requirements outlined in this RFP. Upon selection of a qualified developer, Sunstone intends to negotiate a development agreement within 45 days of developer selection based on approval of the Ashland School Board of Directors. Although the final scope of work will be negotiated in the executed development agreement, the selected developer shall be responsible for performing the following scope of work which shall include, but not be limited to:

- Develop a plan for the acquisition, at fair market value, of the subject property from the District.
- With the assistance of Sunstone, acquire grants and funding for the development of the Project.
- Obtain all required approvals, permits and entitlements necessary to design, construct, and develop the Project, including necessary infrastructure, in line with the goals described by Sunstone and presented in the Master Plan.
- Develop the design of scope, structural design, design documents as required, design coordination, vendor solicitation, sequencing, scheduling, budgets, including value engineering, and communication for the Project.
- Report to Sunstone on Project status on a regular basis throughout the course of the Project. Prepare and present status reports to Sunstone, any committees, and the District, as applicable.
- Retain architects, construction managers, program managers, project inspectors, and other specialty technical consultants as needed.
- Manage compliance with environmental and other regulatory requirements, as well as with applications for grant or funding sources available for development of affordable housing.
- Develop and maintain an overall cost and schedule reporting system for the Project.
- Review the Project with Sunstone to define and refine the Project scope with Sunstone staff and consultants. Sequence and schedule construction work for the Project with design architects, construction managers, project managers, and Sunstone staff.
- Submit necessary reports to funders, as well as federal, state, and local authorities. Ensure that all other Project participants submit necessary documentation.
- Coordinate and maintain schedules that document the sequence and time frame for the Project.
- Work with Sunstone to develop criteria for residential occupancy, in accordance with applicable law.

SUBMISSION REQUIREMENTS

Developer Prequalification Requirements

It is expected that an interested developer or development team shall meet the following minimum requirements and provide proof of satisfaction of such requirements:

- Developer(s) must have a minimum of five (5) years of experience with single-family and multi-family residential development.
- Developer(s) must have experience negotiating development agreements and navigating through municipal entitlements and incentives, including:
 - Zoning Modifications
 - Planned Unit Developments
 - Tax, grant, and other incentive programs
 - Restrictions on assignment and transfer
- Developer(s) must illustrate recent experience with development of successful residential projects, which include affordable housing projects.
- Developer(s) must demonstrate financial resources and capital accessibility.
 - Developer(s) should provide enough information so Sunstone can determine that the developer has the financial ability to develop the proposed project. The precise information provided should be determined by the developer.
- Developer(s) must indicate experience partnering with public entities on development projects.
- Developer(s) must demonstrate the capacity to meet the overall deadline for the Project considering permitting, marketing and sale/rental of the properties.
- As part of the proposal, the Developer should clearly identify the developer(s), including all members of a team, roles, and background experience of members, including identification of comparable successful projects completed by team members.

Proposal Requirements

Cover Letter:

- Expression of interest in the project. Describe your understanding of the project, public-private partnership and why your firm is interested in participating in the Development Team.
- Statement that the construction team members are licensed and registered in the State of Oregon. That your company will comply with all applicable federal, state, and local laws and regulations.
- Contact information including name, address, phone number and email address of the responsible party.

Comparable Project Experience:

- Descriptions and/or photos of at least three comparable completed projects (completed within the last five years). Describe why these projects are relevant to the work described in this RFP (which could include but is not limited to information regarding size, scope, project complexity, property type, etc.).
- Describe experience working on projects that include aspects of low- and median income housing. Provide experience in constructing preferences housing models
- Describe experience working within local or similarly sized jurisdictions.
- Discuss experience as CM/CG on a team that includes the owner, developer, and architect.

Firm Background:

- Describe your firm's history, including the number of years in continuous operation. Include information regarding size and organizational structure. Include names of all persons with ownership interest in the company and their titles/roles. Include MWESB certification, if available.
- Describe your firm's capabilities, identifying the firm's strengths and special capabilities with regards to scope of work.
- Include information identifying annual volume, financial/bonding capabilities, and stability in the marketplace.
- Indicate whether an ownership or significant leadership position in the organization is currently or has been recently vacant (within the last 10 years).

Key Personnel Experience and Capacity:

- Resumes and anticipated roles of staff likely to be assigned to this project. Describe their relevant experience, responsibilities, and approximate amount of time each will devote to this project during each phase.
- Include a list of other current projects and anticipated timeline that each person is responsible for.
- Provide an organizational structure chart that identifies key personnel and their positions.

Inclusionary Practices:

- Describe the process your company will utilize to meet project requirements for COBID and MWESB/SDVE participation. Describe processes your company utilizes to encourage participation by minority, women, and veteran owned businesses.
- Describe your company's experience in establishing, implementing, and administering an apprenticeship program, training programs, or educational opportunities such as those for Ashland School District students.

Project Approach, including

- Public-Private Partnership Arrangement
- Entitlement Strategy, through Final Planned Unit Development
- Project Financing Plan - See Addendum C
- Relevant data if using a phased approach to the project
- Incentive Requirements, such as any tax, permitting, zoning, financing or other incentives provided by public jurisdiction(s)

- Sales Approach for homeownership including any proposed or anticipated partnership with an established community land trust
- Rental Management, Asset Management and Resident Services Strategy
- Estimated all-inclusive cost range for a development meeting the parameters of the example project provided in this document, see Addendum C
- Concept drawings for proposed project at proposed cost with proposed materials

Average Cost for General Conditions and Overhead and Profit

- Provide a range for cost of General Conditions for similar projects. Include the scope of what is included in general conditions and if they are calculated by project size or duration.
- Provide typical Overhead and profit for comparable projects.

Administration of Work, Project Scheduling and Coordination

- Description of your approach to cost estimating: Provide examples from past projects, including explanation of any major variations in estimates on past projects.
- Briefly describe your strategies to provide constructability and value analysis suggestions to the Project Development Team.

References

- Provide a minimum of three references, preferably from clients on comparable projects. Include a reference from an architect.

Discussion of Project Goals

- Be prepared to discuss project goals as outlined in the RFP and how as the Developer you will support the team in the development of the goals.

RFP PROCEDURES

Schedule for Review and Selection

RFP Issued	November 6th, 2024
Mandatory Pre-proposal Meeting (see note below)	November 12th, 2024 3-5pm
Deadline for Questions/Clarifications (see note below)	November 25th, 2024, 2:00PM
Deadline for Proposals (see note below)	December 2nd, 2024, 10:00AM
Scoring of Proposals	December 2nd- 4th,2024

Interviews (see note below)	December 7th, 2024
Notification of Intent to Award	December 20th, 2024

A MANDATORY Pre-Proposal Meeting and Project Orientation will be held at 3:00 PM on November 12, 2024, at the **Rogue Valley Metaphysical Library Meeting Room, 1757 Ashland Street, Ashland Oregon 97520**. Statements made at the Pre-proposal Meeting will not be binding on Sunstone unless confirmed by written addenda. Potential Developers may obtain additional information about the Project and overall Project goals at this time. ATTENDEES MUST BE SIGNED IN AND PRESENT AT THE PRE-PROPOSAL MEETING BY 3:00 PM TO BE CONSIDERED A PROSPECTIVE DEVELOPER. NO EXCEPTION WILL BE MADE. ACCOMODATIONS CAN BE MADE FOR OUT-OF-TOWN RESPONDERS TO JOIN VIA VIDEO CONFERENCE.

Inquiries for clarification or additional information, if any, must be received by 2:00 PM on November 25, 2024.

Responses must be received by Sunstone no later than 10AM, December 2nd, 2024. Responses submitted after this time will be subject to rejection at Sunstone's discretion.

Developers shall be available for interviews (at Sunstone's sole discretion) on December 7, 2024. No other dates will be held. Interview format is TBD.

Submission Procedure

Proposers shall provide five (5) paper submissions of their response and one (1) electronic copy of their proposal on a flash drive in a sealed envelope. Share file link will also be an acceptable electronic version. Proposers are responsible for confirming receipt of proposals. The following must be marked in the lower right-hand corner of the envelope:

ASHLAND ATTAINABLE HOUSING PROJECT

[PROPOSER'S NAME]

PROPOSER'S ADDRESS]

[PROPOSER'S TELEPHONE NUMBER]

Proposals shall be addressed to:
Sunstone Housing Collaborative (SHC)
1467 Siskiyou Blvd. #79
Ashland, Or 97520

For questions, please contact: Krista Palmer, krista@sunstonehc.org

Each Proposal must be an original copy and signed by an authorized member of the Proposer's firm. Faxed responses will NOT be accepted. Each Proposer is responsible for submission of their Proposal. Proposals or revisions to Proposals received after 10:00 AM local time on Monday, December 2, 2024 may be rejected for consideration by Sunstone. Sunstone is not liable for any delivery delays.

Each Proposer is responsible for all costs incurred (or incurred by others on its behalf) in the preparing or submitting of the Proposal, in otherwise responding to this RFP, or in any negotiation incidental to its Proposal or this RFP.

Proposals submitted early may be modified or withdrawn prior to the submission deadline. Any modified or resubmitted Proposal shall be submitted in the same fashion as required by this RFP. Proposals submitted and not timely modified or withdrawn shall be irrevocable for a minimum period of ninety (90) calendar days following the submission deadline.

Selection Criteria

Eligible proposals will be reviewed by Sunstone Housing Collaborative and merit each of the proposals based on the development team's experience with similar projects, project approach, proposed schedule, and project viability.

Though Sunstone's goal with this Project is to provide affordable housing for the Ashland community, including its employees, Sunstone acknowledges that in compliance with the Educational Instruction Access Act, MCL 123.1041, et seq., NBAS shall not discriminate against educational institutions or private schools by refusing to sell or lease its property to a potential buyer solely because they intend to use the property for lawful educational purposes.

Sunstone will select three finalists, with one recommendation, based on the criteria listed in the selection process. Sunstone will present these finalists at a board meeting to the Ashland School District Board of Directors. The ASD Board of Directors shall vote to approve or deny the selection at the same or subsequent meeting. Upon selection of a successful developer, the Board and the project team will enter into a development agreement.

Appendix A – (PDF Insert) Master Plan

Draft Master Plan

79 Lincoln Street
Ashland, OR 97520



11.04.2024

11.04.2024

Draft Master Plan

Table of Contents:

- I. Introduction
- II. Site Analysis
- III. Community Needs Assessment
- IV. Priorities
- V. Climate Resiliency
- VI. Proposed Program
- VII. Design Overview

Attachments:

- A. Site Analysis
- B. 3D Rendering: Northwest View
- C. 3D Rendering: Northeast View
- D. Site Master Plan

I. Introduction

Ashland School District is experiencing a drop in enrollment, and staff is finding it increasingly difficult to afford to live where they work. Availability of affordable housing has become a primary driver in where people choose to live, particularly households with children. The proposed project at 79 Lincoln Street in Ashland is a housing development facilitated by Sunstone Housing Collaborative. This centrally located development will ensure education and opportunity for the next generation, while providing housing that is accessible and affordable to our neighbors.

Initial master planning efforts are dedicated to creating a welcoming and inclusive living environment that prioritizes accessibility and affordability. The designs described and illustrated in this document are conceptual in nature and are intended to guide future design phases, not dictate them. Furthermore, the timeline of the final master plan deliverable is dependent on additional feedback from user groups and project partners. Included in the draft master plan are approximately 91 dwelling units, offering a diverse range of living spaces from studios to three-bedroom units, catering to various household needs. The development will not only provide homes but also foster community through thoughtfully

planned amenities. These features will include energy-efficient appliances to promote sustainability, communal areas that encourage social interaction among residents, secure bike storage to support active lifestyles, gardens for recreation and education, and on-site childcare facilities to assist working families.

II. Site Analysis (See Exhibit A)

Subject Site: 79 Lincoln Street,
Ashland OR 97520

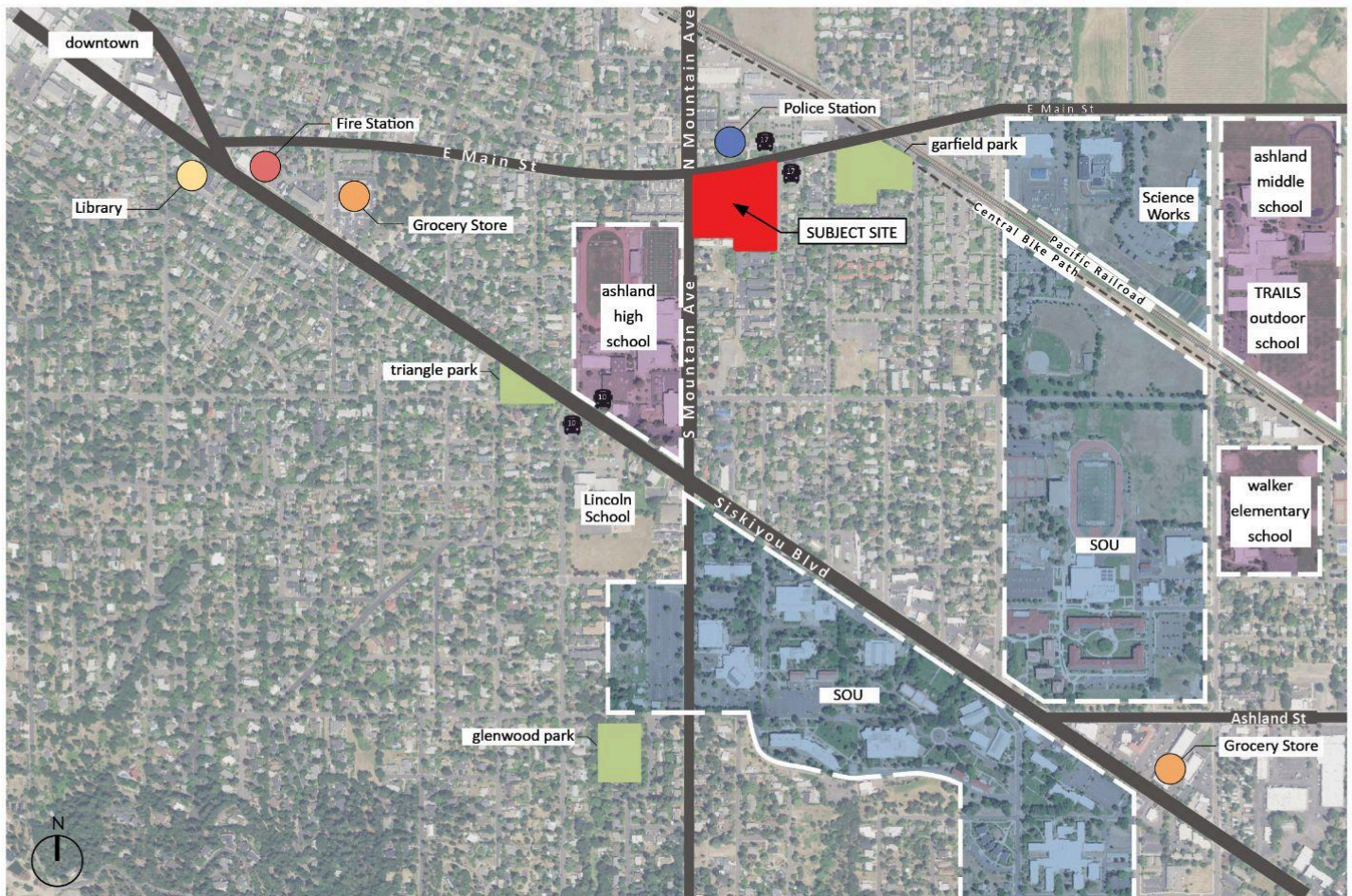
Owner: Ashland School District #5
885 Siskiyou Boulevard
Ashland, OR 97520

Map & Tax Lot #: 39-1E-10-1000

Zoning: R-3 (multiple family)

Overlay Zone: Hillside lands - slopes >25%

Total Acreage: 4.18 AC (182,081 SF)



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

The 4.18-acre property owned by the Ashland School District is located at 79 Lincoln Street within the City of Ashland limits, just 1.1 miles from the Ashland Plaza. The site is bounded by Lincoln Street to the east, N Main Street to the north, S Mountain Avenue to the west, and private residences to the south. Historically, the property has been utilized as a practice field for high school baseball and soccer. It falls under the jurisdiction of the City of Ashland and is zoned R-3, which allows for multiple-family housing. Hillside lands overlay zones exist along the northern and southern boundaries, where slopes exceed 25%, while the interior of the site remains relatively flat.

The property offers a quiet, safe neighborhood environment, with adjacency to the Ashland Police Department, RVTB bus stops, the central bike path, and public schools. The sensory experience of the site features picturesque views of Grizzly Peak and the surrounding foothills. However, it also contends with noise from nearby E Main Street and local sports events at Ashland High School. Mature trees provide some shade along the southern property boundary, while the rest of the site experiences full sun.

Infrastructure on the site includes perimeter fencing, a baseball field, dugouts, a restroom building, and a maintenance shed, along with on-street parking. Pedestrian and vehicle access to the site is primarily from S Mountain and Lincoln. There is a traffic signal located at the intersection of S Mountain and E Main due to high traffic volume. It should be noted that a traffic analysis has not been conducted and consultation with a traffic engineer is recommended to look at vehicle loading on existing roadways and potentially hazardous intersections.

Historically, a pond was located on the site which appears to have been filled to construct the current sports field. As such, the site likely has disturbed soils present of unknown origin given the prior infill construction. A complete geotechnical report and soil analysis with percolation testing is recommended for this project. The current soil composition influences hydrology and drainage patterns, directing sheet surface runoff northward toward the city storm drain system. A City storm drain currently travels beneath the site running south to north. Utilities on site include city of ashland electric, sewer, and water.

In terms of development standards, any new impervious areas will require stormwater treatment in accordance with the RVSS stormwater manual. The R-3 zoning permits a maximum density of 20 dwelling units per acre, with calculations factoring in both the project area and any public land dedicated. A density bonus of up to 60% may be available for features such as conservation housing, common open spaces, and affordable housing. Additional building requirements include a maximum lot coverage of 75% with a minimum of 25% landscape area, defined setbacks of 15 feet in the front, 6 feet on the sides, and 10 feet for corner and rear setbacks, and a maximum allowable building height of 35 feet or 2.5 stories, which can increase to 50 feet with a conditional use permit. This property presents a

significant opportunity for developing accessible, affordable housing that meets community needs while adhering to local regulations and environmental considerations.



Above: Thumbnail view of the attached 'Exhibit A: Site Analysis'

III. Community Needs Assessment: Sunstone User Group Surveys

Prioritizing community engagement and cohesion enriches the planning process and lays the foundation for a successful development that genuinely reflects and serves the needs of its residents. The following data has been collected by Sunstone Housing Collaborative via online surveys distributed to key target user groups. This summary offers some design insights to inform the final master plan document, although additional input will be sought from the community during future phases of master planning and design.

Sunstone Survey #1: Ashland School District Staff

The survey conducted among Ashland School District (ASD) staff gathered input from 55 respondents regarding their housing needs and preferences. The survey revealed that the staff is nearly evenly divided between those living in Ashland and those commuting from outside the city, with all indicating a desire for housing assistance to live comfortably in town.

Walkability and universal access were significant themes, as respondents expressed the desire to walk to work or have convenient commuting options. Proximity to parks and bike paths was mentioned,

along with a need for ADA accessibility, suggesting that ground level homes would be preferable for older staff members.

In terms of outdoor space and pet accommodations, survey respondents showed a strong preference for adequate private backyards or fenced lawns, with six individuals specifically noting this need. Additionally, twelve respondents indicated a desire for pet-friendly properties. Many expressed a preference towards houses with yards, opposed to apartments, if living with animals.

The survey also showed the importance of family-sized housing and diverse layout options, highlighting the importance of spaciousness for families with children. A preference for single-family homes was expressed with a desire for privacy and quality amenities like in-unit laundry, dishwashers, and reliable maintenance. Overall, the feedback showed a preference for high-quality, family-oriented housing solutions that cater to the unique needs of the ASD staff.

Sunstone Survey #2: ODHS Disability Services Advisory Council

The Oregon Department of Human Services (ODHS) Disability Services Advisory Council Housing Survey gathered insight from six respondents, all of whom live with a physical disability. Among the key findings, respondents noted that wheelchair dimensions typically range from 26 to 28 inches in width and 40 to 53 inches in length, with additional length required when seated with feet extended. Five of the six respondents reside outside of Ashland, coming from areas such as Josephine County, Medford, White City, Klamath Falls, and Central Point, while one participant lives in Ashland.

Half of the respondents reported that their current housing costs 30% or less of their monthly income, while the other half indicated otherwise. Similarly, the responses were evenly divided regarding whether their current housing meets their accessibility needs and whether it comfortably accommodates live-in caregivers, roommates, or family members.

When asked about essential qualities in housing, the top priorities identified were affordability, meeting accessibility requirements, being family-friendly, and having reliable utilities. Additionally, desired features in newly constructed housing included adequately sized bathrooms, wider hallways and doorways, and zero-step home entry. Overall, the survey shows the need for affordable, accessible, and family-friendly housing options for individuals living with disabilities.

Sunstone Survey #3: OCDC Participant Families

A survey has gone out to The Oregon Child Development Coalition (OCDC), and responses will be included in the updated master plan.

IV. Priorities

The members of Sunstone Housing Collaborative have articulated a comprehensive set of goals and priorities for the success of the proposed multi-family housing development, highlighting a strong commitment to inclusivity and sustainability.

Most Important:

- Universal Design
- ECE/Infant + Toddler Care Onsite in collaboration with Oregon Child Development Coalition (OCDC)
- Guaranteed Affordability in Perpetuity - Rentals & Homeownership

Important:

- Outdoor Play Area
- Covered Bike Parking
- All Electric Utilities
- Storage/Garage Space
- Truly Mixed Income (Avoiding Siloed Affordable Units)
- Rental Units 60-80% AMI (School Staff, Service Workers)
- Affordable Ownership via Community Land Trust 60-80% AMI & 80-120% AMI

Moderate Importance:

- All Ground Units VISIBLE
- Certain Percentage of Ground Units Max Accessible
- Certain Number of Family-Sized Units Max Accessible
- Reservation of ± 5 Units (Studio/1BR) for Ashland Supportive Housing for Adults with developmental disabilities (DD)
- Green/Sustainable Building Methods
- Maximum Longevity for Construction Materials
- Community Garden
- Common Indoor Space for Events and Community Resources
- Solar Power
- Rental Units < 60% AMI (Apartments/Cottages for Single Disabled Residents)
- Rental Units 80-120+ AMI (Teachers, Nurses, Dual-Income Families)
- Housing Types: Apartments, Townhomes, Condos, Cottages, Single Family Homes

Lower Importance

- Onsite Property Management

Least Important Goals

- Market Rate Rentals and/or Ownership

V. Climate Resiliency: Design Insights from Ashland's 2017 Climate Energy Action Plan (CEAP)

Noted Ashland School District ("ASD") priorities: improve health and safety, prioritize flexibility and adaptability, standardize facility systems, plan for the future, and be more sustainable and energy efficient.

CEAP Buildings + Energy Section:

- **Building energy efficiency (Strategy BE-2):** improve buildings' energy use through passive heating and cooling
 - Incorporate shade study into building and site design to ensure adequate shade for outdoor common spaces and strategic building design to encourage passive cooling, heat reduction
 - Provide energy-efficient appliances and lighting fixtures for interior design
 - Reduce heat absorption through the use of light-colored materials in hardscape and building design
 - Research solar-powered landscape lighting options
 - Review proposed CEAP strategies to reduce energy efficiency barriers in rent/lease properties as relates to potential Sunstone user demographic (BE-2-3)
 - Work with Ashland's Affordable Housing Program to identify incentives around minimum energy efficiency standards for affordable housing developments. (BE-2-4)
- **Prepare and adapt buildings for a changing climate (Strategy BE-5):** adapt buildings to better withstand climate impacts such as extreme heat and wildfire and protect residents through improved design and functionality
 - Design heat tolerant building approaches such as cool roofs, green roofs, and passive air circulation breezeways. (BE-5-1)
 - Incorporate fire-resilient building materials and landscape design

CEAP Urban Form, Land Use + Transportation Section

- **Support better public transit and ridesharing (Strategy ULT-1):** expand current transportation network for more efficient and convenient rider options
 - Review current bus routes along Main. St and Mountain Ave. for existing bus stop locations and consider commuter access for circulation design.
- **Make Ashland more bike and pedestrian friendly (Strategy ULT-2)**
 - Consider safe biking designations in on-site roadway design
- **Support more efficient vehicles (Strategy ULT-3)**

- Review potential for revised land use codes requiring electric vehicle (EV) charging infrastructure at multifamily developments (Strategy ULT-3-2)
- Consider providing electric charging stations for vehicles, motorized scooters, and wheelchairs on site
- **Support more climate-ready development and land use (Strategy ULT-4)**
 - Review new development regulations as part of the Wildfire Lands Overlay addition to urban growth boundary as the updated overlay may include more urban parts of the city based on recent risk assessments (Strategy ULT-4-3)
 - Promote walkable neighborhoods and infill density in community development plans (Strategy ULT-4-2).
 - Specific features to consider: walking, biking, transit, parking management, and climate adaptation features which support affordable housing and do not increase housing costs.

CEAP Natural Systems Section:

- **Water conservation (Strategy NS-2):** look for opportunities to reuse water and conserve water on-site
 - Provide water-efficient appliances for interior design
 - Optimize drip irrigation for landscaping (NS 2-2) and consider opportunities to reuse greywater on site (NS 2-1)

CEAP Consumption + Materials Management Section:

- **Support sustainable and accessible local production and consumptions (Strategy CM-2):** reduce GHG emissions from shipping in imported goods
 - Expand community garden and urban agriculture (Strategy CM-2-2)
 - Consider opportunities for on-site gardening as well as possible School District and/or SOU Sustainability Department partnership where foods grown on campuses are shared with Sunstone housing development
- **Expand community recycling and composting (Strategy CM-3)**
 - If the multi-family recycling ordinance is updated to encourage more diversion (Strategy CM-3-2), consider sufficient recycling space and universal access on site.

VI. Proposed Program

*As feasible without affecting affordability

**As feasible without affecting the total number of target units on site

Housing:

- approximately 91 dwelling units
- Studio & 1 br units
- 2 & 3 br units (highest target percentage)
- **Shop / storage space (bikes, house projects, equipment, toys)
- *In-unit laundry
- Flexible spaces
- Accessible
- Climate-resilient housing
- Innovative building methods and other sustainability upgrades and features should all be explored (LEED, Earth Advantage, solar, stormwater, greywater, local materials, CEAP standards, Rogue Re-Imagined, Energy Trust)

Shared use and site features:

- Child care, with outdoor play area
- Social services
- Property management adjacent to community space
- Event / meeting space
- Co-working space / open copy-print kiosks
- 25% min. Landscaped area (per City of Ashland Municipal Code)
- Community garden
- Integrated outdoor play areas
- Lawn/Open space
- Dog relief zone
- Stormwater detention
- Flexible Pavilion(s)
- Wildlife considerations
- Open outdoor gym
- Clothes lines

Infrastructure:

- Trash / recycle services
- Solar panels
- Electric car charging
- Electric wheelchair charging
- Technology amenities - landscape light sensitive sensor lights, smart locks and access controls (might help with property management)
- Streamlined access to internet and technology

Vehicles:

- Visitor Car Parking
- Resident Car parking (Approx. 1.25 spaces per unit)
 - *Covered
 - Uncovered

- *Garage
- Bike parking
 - Storage facility
 - Covered
- Emergency vehicle access



Above: Thumbnail view of the attached 'Exhibit D: Site Master Plan'

VII. Design Overview (See Exhibits B, C, D)

This design overview reflects current goals and priorities, however it is not a complete guide. The general ideas are important, but there is room to adapt and shift with specifics.

Housing Types

Unit sizes and types

- Studio Unit
 - minimum 350 Square feet
 - 1 full bathroom

- One Bedroom Unit
 - Minimum 500 Square Feet
 - 1 full bathroom
- Two Bedroom Unit
 - Minimum 900 Square Feet
 - 1 full bath/1 half bath
- Three Bedroom Unit
 - Minimum 1250 Square Feet
 - 1 full bath/1 half bath

Inclusion and equity in design of units

To create a sense of belonging, a study of housing layouts from various cultures that potential users have come from should be performed and incorporated into the proposed designs. Accessible and adaptable units are to be included at ground level of each building based on community need, not minimum regulatory requirements.

Privacy

Careful consideration of window and door placement is an important aspect of the interior design which creates visual privacy between units and common spaces while emphasizing positive viewsheds. Wall thickness, insulation, and window thickness are to be reviewed thoroughly to reduce sound transfer as much as possible.



Above: sample visuals of adaptable floor plan and interior wall concept

Source: Women's Property Initiative Older Women's Housing Project by Studio Bright



Above: Accessible route from parking to front door and from front door to street

Accessibility

As part of a comprehensive approach to accessible circulation, well-marked interior and exterior routes will be provided to meet users' mobility needs. A universal design focus will be implemented in parking, site circulation, shared community spaces, interior circulation areas, and within the dwelling unit floor plans to ensure all residents can comfortably and safely access amenities across the site.

Travel Throughout the Site and Beyond

Multi-modal access should be integrated into the site to encourage walking, bike use, and public transit use. There is potential for shared bike parking, a covered bus stop with a bench, a multi-use path with integrated exercise stations, and accessible pet-walking pathways throughout the site.

Per code, the fire truck hose is a maximum of 150' in length and needs to be able to reach each home and building. A U-shaped driveway has been included to accommodate emergency vehicle access so that all homes can be reached during emergencies. The U-shaped driveway can accommodate an aerial fire apparatus and is 24' in width, to allow for both perpendicular parking and for cars to have enough space to back up. Sidewalks and crosswalks have been considered for pedestrian safety.

Wayfinding throughout the site should include intuitive, legible signage and indicators. This can be done by increased text size, translation in multiple languages, and consistent color coding. Buildings are placed on the perimeter of the site to increase safety and sense of ownership within the core of the site, where open space is prioritized for community use.

Parking

The number of parking spaces is not dictated by local or regional codes, but determined by the number of units proposed, with the goal of having approximately 1.25 parking spaces for every unit. Additional user input, consultation with the City community development department, and a traffic engineer is recommended to determine the appropriate number of parking spaces.



Above: Integrated recreation & play in the landscape

Community Outdoor Space

Accessible landscaping and recreation areas are to be included throughout the site. These amenities could include shaded pavilions with outdoor lighting features, a fenced space for community gardening, expansive turf lawn for sports and community events, an inclusive play space for children of all ages, exercise and wellness zones, an area for dog use, and a flexible outdoor meeting space adjacent to the community room.

Childcare Facilities

Daycare facilities have specific requirements that will need to be met on this project in order to meet local and state regulations.



Above: Pergola with lighting for after-work evening assembly, accessible wheelchair space and a few seating options.



Above: Private patio and balcony standards

Personal Outdoor Space

As noted in the current user survey feedback, access to personal outdoor space is valued by many when considering desired housing attributes. A designated enclosed patio/yard for level 1 units allows residents to enjoy a private space to customize their outdoor needs based on their personal interests. Private balconies should be included for units on levels 2 and 3 for the same intended purpose. Patios and balconies are intended to be at minimum 6' wide and 8' long to allow for a variety of uses.

Technology

To maximize Wifi usage and access throughout the development, Wifi and Data should be installed during construction, before residents move in. Smart home technology can be considered for ground level universally accessible units. Smart plugs, lighting, and locks can be helpful to residents with disabilities or mobility challenges. Electrically operated doors can also be considered for universally accessible units and common spaces. Along outdoor pathways and parking areas, dark sky lighting should be used with automatic dimming settings to reduce light pollution and energy use, while maintaining a safe and inviting environment at night. Within the landscape, smart irrigation systems should be considered with a controller that can adjust watering times based on weather conditions and with the added capacity to identify watering inefficiencies.

Renewable Energy Sources

To lower electric bills and provide a sustainable source of energy, solar panels should be installed on the roofs of residential buildings. Electric-only power is proposed throughout for heating & cooling, hot water heating, and cooking, without the use of natural gas. The concept of zero energy construction could be considered as a way to lower living costs for residents and increase sustainability on site. Zero energy construction proposes an innovative approach to designing for and constructing enough renewable energy on site to be able to meet all on-site energy needs annually.

Stormwater Management

When planning for stormwater management, several effective techniques can enhance water quality and manage runoff. Rain gardens absorb and filter stormwater, while retention ponds provide storage and wildlife habitat. Water quality swales act as natural drainage channels that filter pollutants, and detention areas temporarily hold water to reduce flooding. Proper soil preparation and application of fire-resilient mulch improve infiltration and moisture retention. Incorporating native plants improves biodiversity and reduces maintenance, while permeable pavers allow water to seep through, decreasing runoff. Filtered vegetated parking strips further treat water as it flows, promoting healthier ecosystems.

Efficient and Mindful Design

Holistic design aims to create integrated, sustainable environments by viewing all project elements—buildings, landscaping, water management, and energy systems—as interconnected parts of a larger ecosystem. A user-centric approach ensures the design supports both social and

environmental goals. Additionally, holistic design considers long-term implications, promoting resilience and adaptability to future climate conditions and community needs.

Sustainable Material Choices

- Using locally sourced materials helps decrease transportation-related pollution because these materials don't have to be transported over long distances. Shorter transportation routes mean less fuel consumption and fewer emissions, contributing to a lower overall environmental impact.
- Sustainable insulation materials to consider include:
 - Cellulose: made from recycled materials and requires minimal energy to produce
 - Sheep's wool: a 100% natural product
 - Cork: harvested from cork oak trees without harming the tree
- Identify building materials, paints, and sealants that are low VOC (volatile organic compounds) and non-toxic.
- Incorporate recycled materials such as recycled concrete or brick to use as a fill material or as a base for hardscaping. Reclaimed wood can be used for building finishes and garden beds.
- Utilize renewable building materials, such as bamboo.
- Permeable pavement could be considered to reduce stormwater runoff and increase percolation on site into the groundwater, thus benefiting the plants on site, reducing the need for detention basins, and reducing the impact that the development will have on the City's stormwater system and the Bear Creek watershed.
- Selecting native, firewise, and climate adapted plant varieties in the landscape will reduce the need for excessive irrigation, improve resilient habitat for local wildlife and pollinator species, and reduce long term maintenance costs.

Sustainable Construction Techniques

- Sediment and erosion control measures shall be well planned and implemented.
- Depending on how funding sources come together, the construction process can be broken up into phases. Each phase would be functional on its own, with the idea that it would be part of the whole plan and system once all phases are completed. Project phasing should be chosen based on site access and existing infrastructure.
- Prefabricated or modular buildings are typically more affordable, and create efficiency in the construction process.
- Establish the proposed finish floor elevations of each structure approximate to existing grade to avoid major site grading. This reduces site disturbance, the amount of fuel and labor required, and reduces the addition or removal of earth that goes into grading a site.

Sustainable building design considerations

- Passive solar design can be created by increasing windows on the south side of the units, and creating an overhang of a specific depth to foster an environment where sunlight helps heat the unit in the winter, while shading from sunlight in the summer to reduce heat gain.
- Solar tube skylights are a strategic way to bring in more natural light into the units, and may reduce electricity usage.

Water conservation techniques

- Select plumbing fixtures that maximize water pressure while limiting water usage.
- Utilize a drip irrigation method for plant watering on site.
- Water conservation in the landscape can be improved through identifying drought tolerant planting materials, reducing the size of traditional lawn areas, and providing adequate soil preparation for landscaped areas to reduce the amount of irrigation plants rely on to survive during summer months.

Waste management and Recycling Solutions

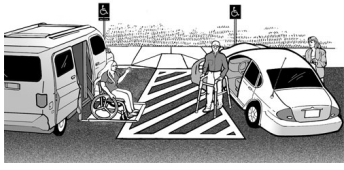
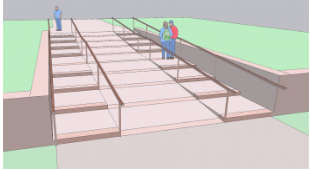
Recology, the local waste management provider, does not have a preference for dumpster versus individual bins. Individual bins should be an option for townhome units, and dumpsters will likely be the primary trash and recycling solution. To promote reuse of materials before recycling, a reuse station could be incorporated into the site, where items like plastic shopping bags, packaging materials, and more could be stored and shared within the community. Additionally, a community-run composting program may be considered either on site or in partnership with an outside organization.

Universal Design

Universal design is an approach for architecture and landscape architecture that creates environments that are accessible and usable for people regardless of their age, ability, cultural background, or status. The resulting design creates spaces that accommodate a wide range of needs, making them universally inclusive. As the proposed Sunstone community is intended to meet the housing needs of a wide range of future residents, adopting a universal design approach to building and site design will help ensure residents are comfortable in both their homes and in accessing the shared site amenities.

Universal design is a priority on level 1, but is not expected to be applied to all levels. The images and parameters included in this section are examples of universal design, not explicit requirements.

Exterior Circulation Design

Parking	Elevation changes	Sidewalks	Entry
			
Min. 96" wide accessible parking spaces with access aisle min. 60" wide, no more than 2.08% slope in all directions with firm, slip resistant surface, and international accessibility symbol sign mounted at least 60" above the ground.	Offer options for different user options. Min. 48" wide ramps and stairs.	Min 6' Sidewalk width. Smooth surface. color and texture guides for directions.	Minimum of 5'x5' clear space in front of exterior door. Covered Entry.
image and text source: https://www.ada.gov/topics/parking/	image and text source: theintertwine.org	image source: flickr.com/photos/8232914@N02/8128451184 information source: planning.org	image source: columbusdesignremodeling.com

Interior Circulation Design

Thresholds	Hallways	Doors	Windows
			
Exterior door threshold no greater than .5". Interior thresholds to be no greater than 0".	Minimum hallway width of 42".	Minimum door width of 36". Hardware that requires minimal effort, lowest cost option is lever handles. To be located 30" - 44" above floor finish grade.	Awning or casement window with crank system to open and close.
image source: udll.com information source: universaldesign.org	image source: homestolove.co information source: simsbuilders.com	image source: kolbewindows.com information source: universaldesign.org INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS	image source: hmota.net information source: hmota.net

Typical Details

Cabinet Hardware	Counter height
	
pull style hardware with more than 13/16" inner projection and more than 3.2" inner length, and no overhangs.	The top of the counter to be between 28" - 34" above finish floor
image source: amerock.com information source: theknobshop.net	information source: ICC_A117.1-09

Kitchen

Sink - Stove - Oven	Fridge - Freezer
	
Kitchen sink and stove to have a 27" minimum clearance in height finish floor surface, and 30" minimum clearance in width. Built in wall type oven with side swinging door to be installed at 27" above finish floor surface.	under the counter pull-out style fridge and freezer.
image source: conceptmobility.co.us information source: ICC_A117.1-09	image source: homedepot.com

Bathroom

Shower	Toilet	Sink
		
Roll-in shower minimum of 36" wide and 60" long. Folding seat and grab bars included. Shower head fixture doubles as a grab bar.	grab bars on either side. toilet/bidet combo.	27" minimum clearance in height from finish floor surface. facing the sink, 48" long x 30" wide clear floor space.
image source: bathing.solutions.co.uk information source: INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS	image source: information source: INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS	image source: information source: INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS

Laundry**HVAC**

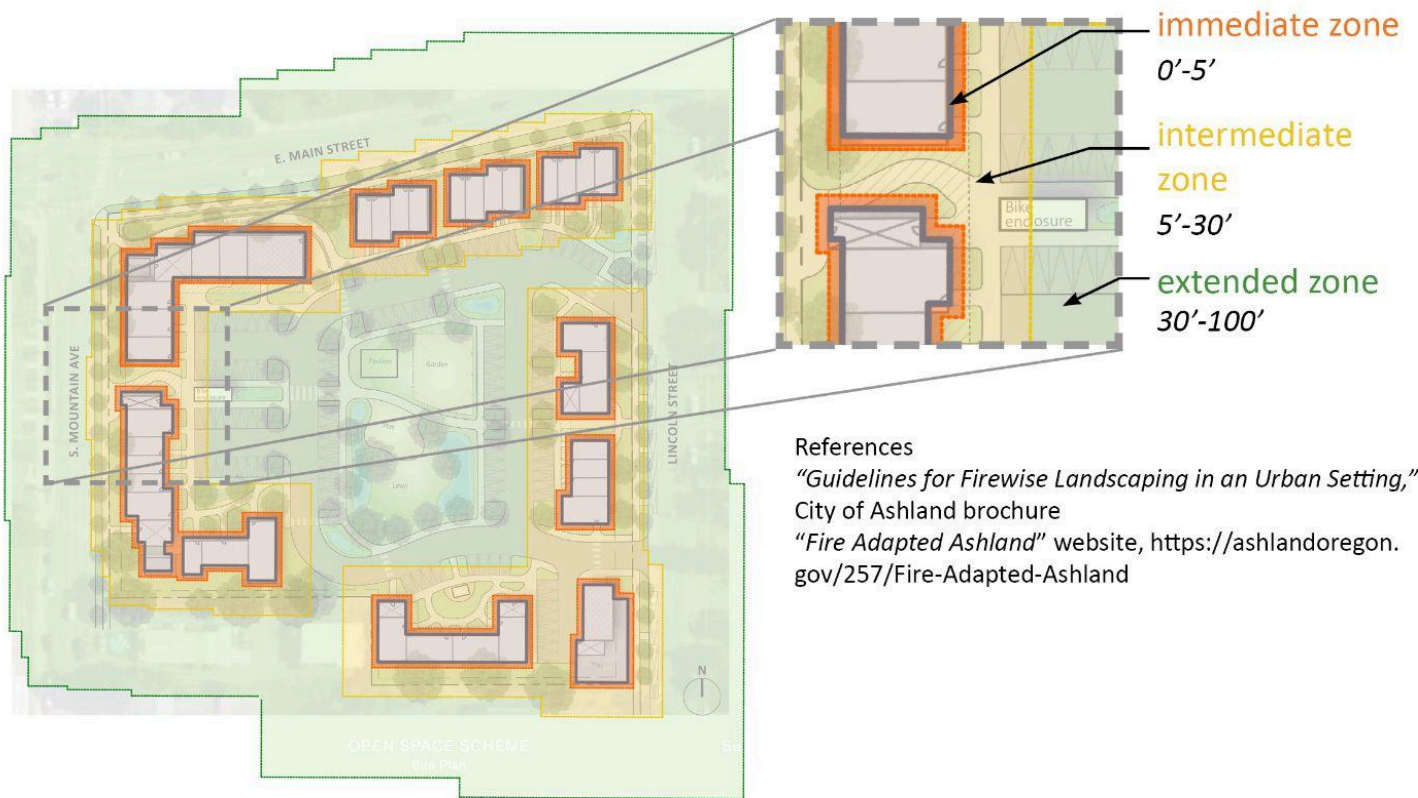
Washer - Dryer	Vent	Heat AC Controls
		
Front loading washer and dryer. raised 6-10" to increase ease of use.	wall mounted return vent for ease of changing vent filter. no taller than 42".	control panel no taller than 42".
image source: pcrichard.com	image source: americanwoodvents.com/	image source: bedbathandbeyond.com

FireWise best practices in site design

The units on site are accessible by fire trucks and emergency vehicles via the proposed 24 ft driveway that also serves as the fire apparatus road running through the site with access from Lincoln Street. This allows for the 150 ft hose line access to the proposed buildings. In addition to meeting all fire and life safety building codes and requirements for emergency egress, best practices for hardening the site and proposed buildings to be more resilient against the future potential of wildfires will be addressed as part of the design's approach to climate adaptation and risk mitigation. As identified in the City of Ashland's CEAP and noted on the site analysis exhibit, the city faces an increased risk of future wildfires encroaching upon urban areas of town, along with an increase in extreme temperatures and flooding. The proposed site design has been adapted to illustrate currently recommended Firewise fuel mitigation zones within 100' of a built structure. The first five feet around a building structure should be maintained as a non-combustible zone designed with resilient landscape materials such as stone, decomposed granite, hardscaping, and fire-resilient groundcovers and shrubs. Strategic landscape design incorporating more fire-resilient plant material will be provided in the intermediate and extended zones on site with proposed trees located to maintain necessary clearance from building eaves and avoid creating ladder fuel conditions with understory planting.



Above: Firewise zones example on site, based on CEAP wildfire planning guidance and Firewise USA best practices



Above: Fuel zone representations indicated on current site layout for further design implementation.

References:

- *The Americans with Disabilities Act (ADA)*. <https://www.ada.gov/>. (n.d.).
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- 2010 ADA Standards for Accessible Design
<https://www.ada.gov/assets/pdfs/2010-design-standards.pdf>
- *Ashland Climate and Energy Action Plan*. (2017). City of Ashland.
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- *Best Practices for Fire Resistant Landscaping*. Fire Adapted Ashland. (n.d.).
<https://ashlandoregon.gov/919/Best-Practices-for-Fire-Resistant-Landsc>
- National Fire Protection Association. (n.d.). *Preparing Homes for Wildfire*. Firewise USA .
<https://www.nfpa.org/education-and-research/wildfire/firewise-usa#preparing-homes-for-wildfire>
- <https://www.earthadvantage.org/climate-friendly-housing/building-certifications.html>
- Oregon Fire Code, 2022 ED. <https://codes.iccsafe.org/content/ORFC2022P1>
- <https://www.usgbc.org/leed/rating-systems/neighborhood-development>
- Rogue Valley Stormwater Quality Design Manual
<https://www.rvss-or.gov/sites/default/files/uploads/rvsqdm-revised-july-2024.pdf>

Appendix B – Demographic Data

Demographic Data

Useful demographic and household data has been included below. This information is based on independent research and US Census data and should be validated by the developer, as needed.

AFFORDABLE HOUSING GUIDELINES								
Income Limits by Family Size: \$/year								
May 2024 - May 2025								
Number of Persons in Family/Anticipated Unit Size								
% AMI	1 Person	2 Persons	3 Persons	4 Persons	5	6	7	8
	Studio/1BR	Studio/1BR/ 2BR	1BR/2BR	2BR/3BR	3BR/4BR			
Extremely Low Income (30%)	\$ 18,450	\$ 21,100	\$ 25,820	\$ 31,200	\$ 36,580	\$ 41,960	\$ 47,340	\$ 52,728
Low Income (50%)	\$ 30,750	\$ 35,150	\$ 39,550	\$ 43,900	\$ 47,450	\$ 50,950	\$ 54,450	\$ 57,958
Income at 60% of Median	\$ 36,400	\$ 41,600	\$ 46,800	\$ 52,000	\$ 56,200	\$ 60,300	\$ 64,500	\$ 68,658
Moderate Income (80%)	\$ 49,200	\$ 56,200	\$ 63,250	\$ 70,250	\$ 75,900	\$ 81,500	\$ 87,150	\$ 92,758
Median Income (100%)	\$ 61,450	\$ 70,200	\$ 79,000	\$ 87,800	\$ 94,800	\$ 101,800	\$ 108,850	\$ 115,908
Income at 120% of Median	\$ 73,750	\$ 84,300	\$ 94,800	\$ 105,350	\$ 113,800	\$ 122,200	\$ 130,650	\$ 139,108

Appendix C – Finance Data

SOURCES & USES OF FINANCING		Residential	Commercial/ Community	TOTAL
SOURCES				
LIHTC Equity				
Permanent Loan				
Public Source A (TBD)				
Public Source B (TBD)				
Developer Equity				
Total Sources		-	-	-
USES				
Acquisition				-
Construction				
Soft Costs				
Financing and Other Costs				
Total Uses		-		-



Council Business Meeting

Date: December 3, 2024

Agenda Item	Appointment of Councilor Kaplan to Sunstone's selection committee
From	
Contact	

SUMMARY

Approval of Mayor Graham's recommendation for the appointment of Councilor Bob Kaplan to serve on the scoring committee evaluating applications responsive to Sunstone Housing Collaborative's "Request for Proposal for a Development Team for the Ashland Attainable Housing Project."

POLICIES, PLANS & GOALS SUPPORTED

Ashland Housing Production Strategy

BACKGROUND AND ADDITIONAL INFORMATION

Sunstone Housing Collaborative was established in December 2023 as a non-profit organization to support the educational mission of Ashland School District and the associated Housing Production Strategy of Ashland by creating community partnerships to develop mixed-income housing intended for district staff as well as families with children. The purpose of Sunstone's work is to increase ASD student enrollment, help the district retain staff and contribute to the flourishing of Ashland community members.

In 2024, after grant review by the Housing and Human Services Advisory Committee, the Ashland City Council approved a grant to Sunstone Housing Collaborative from the Housing Trust Fund in the amount of \$55,000, a Social Service Grant in the amount of \$7,500, and provisional funding from the Community Development Block Grant in the amount of \$125,660.

On November 6, 2024, Sunstone Housing Collaborative issued a Request for Proposal for a Development Team for the Ashland Attainable Housing Project. Proposals are due by 10:00am on Tuesday, December 2. Sunstone has constituted a scoring committee of about 12 members representing the Ashland School District, two employee unions, the Oregon Child Development Coalition, and the City of Ashland to evaluate the proposals. Sunstone will select three finalists, with one recommendation, based on the criteria listed in the selection process. Sunstone will present these finalists at a board meeting to the Ashland School District Board of Directors. The Ashland School District Board of Directors shall vote to approve or deny the selection at the same or subsequent meeting. Upon selection of a successful developer, the Board and the project team will enter into a development agreement.

Bob Kaplan served as a member of the citizens' advisory committee supporting ECONorthwest consultants drafting the Ashland Housing Production Strategy. Since joining the City Council in January 2023, he has served as Council Liaison to the Housing and Human Services Advisory Committee.

FISCAL IMPACTS

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move to approve the appointment of Councilor Bob Kaplan to serve on the scoring committee evaluating applications responsive to Sunstone Housing Collaborative's "Request for Proposal for a Development Team for the Ashland Attainable Housing Project."

REFERENCES & ATTACHMENTS

1. Final Ashland HPS_v2
2. Revised Sunstone RFP + Master Plan





Council Business Meeting

3. MtgMIN2024-04-16



City of Ashland

Housing Production Strategy

Date May 2023

Prepared for: City of Ashland

Final REPORT



ECONorthwest
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Acknowledgements

ECONorthwest prepared this report for the City of Ashland. ECONorthwest and the City of Ashland thank those who helped develop the Ashland Housing Production City. This project is funded by Oregon general fund dollars through the Department of Land Conservation and Development. The contents of this document do not necessarily reflect the views or policies of the State of Oregon.

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- Echo Fields, HHSAC Member
- Julie Gillis, Social Equity and Racial Justice Commissioner
- Noah Hurley, Southern Oregon University, Assistant Director of University Housing
- Denise James, Affordable Housing Developer
- Bob Kaplan, Climate Policy Commissioner
- Kerry KenCairn, Planning Commissioner
- Gil Livni, Market Housing Developer
- Julie Stacy, Lender
- Rich Rohde, HHSAC Member
- Lisa Verner, Planning Commissioner

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Executive Summary

The City of Ashland has sponsored several housing planning efforts over the last several years to address housing access, quality, and affordability concerns. While the City has accomplished much to date, there is still work to be done to ensure Ashland's existing and future housing needs are met. Ashland developed and adopted a Housing Capacity Analysis in 2020, which provided information about the City's unmet housing needs. To build on their progress, the City applied for a grant with the Department of Land Conservation and Development in 2021 to develop a Housing Production Strategy.

Purpose of the Housing Production Strategy (HPS)

Many households in Ashland are struggling to afford housing. Ashland housing costs and rents have risen sharply in recent years and are considerably above regional averages. About 46% of Ashland's households are cost burdened (i.e., paying 30% or more of their income in rent). Ashland's 2021-2041 Housing Capacity Analysis clearly identifies a lack of housing that is affordable to households with lower and moderate incomes.

Some groups are particularly vulnerable to increasing housing costs and may have special housing needs. The HPS is intended to include actions to work together to achieve equitable outcomes for all residents of Ashland, with an emphasis on improving outcomes for underserved communities, lower-income households, and people in state and federal protected classes. Key groups with unmet housing need in Ashland include:

- **Seniors.** Many seniors live on fixed incomes and cannot always afford increases in housing costs. They may also need housing that is physically accessible and close to services (such as nearby health care or in-home assistance).
- **People of color (POC).** POC are more likely to rent their homes and to live in multifamily housing (except Asian) than the overall average in Ashland. These households may need assistance to avoid displacement and access to housing without discrimination in locations with "high opportunity" (such as areas near jobs, transit, or services).
- **People with disabilities.** Across Oregon, people with one or more disabilities experience disproportionate cost burden. Some people with disabilities may need physically accessible housing near services (such as nearby health care or in-home assistance).
- **People experiencing homelessness.** People experiencing homelessness (or at risk of homelessness) may need a range of supports from immediate assistance (including rent support) to permanent supportive housing (including supportive housing with services) and access to affordable units.

How can the HPS support housing development?

This Strategy identifies and describes actions and implementation steps to support development of housing, address housing affordability challenges, and encourage the preservation of existing affordable housing. With this Strategy, the City identified a set of actions to support new and existing affordable development. The actions will encourage the development of more affordable and diverse housing types; grow partnerships with housing providers, developers and agencies involved in housing issues; and increase housing stability for Ashland residents.

Exhibit 1. Summary of HPS Strategies

Strategies	What is it?	How does the strategy help?
A. Evaluate participating in or establishing a land bank.	Land banks support low- and moderate-income affordable housing development by reducing or eliminating land cost from development, increasing a nonprofits' capacity to build affordable housing. The City could contribute funds or lands to affordable housing projects or land trusts.	Provides a pipeline of land for future development and control the type of development that may occur on that land.
B. Evaluate opportunities to participate in a land trust.	Land trusts hold land in perpetuity and sell or lease the housing on the land at below-market rate prices. The City could partner with and contribute funds or land to an existing non-profit land trust or participate in the formation of a new non-profit land trust if one does not exist with sufficient capacity to serve Ashland.	Supports affordable housing development by holding land in perpetuity and selling or leasing the housing on the land at below-market rate prices.
C. Host educational events with the Housing and Human Services Advisory Committee or other organizations	The City can work with the Housing and Human Services Advisory Committee or other organizations to host educational events. Trainings could focus on topics such as fair housing and housing discrimination, foreclosure, eviction, tenant and landlord rights, trainings to serve vulnerable populations, or other information needs as they arise.	Provides education around housing issues, which can help prevent and address housing discrimination, ensure rights are protected, and connect residents with housing resources.
D. Develop an equitable housing plan	An equitable housing plan could implement strategies from the Fair Housing Analysis of Impediments Report, such as offering education and training, reviewing City policies for disparate impact and biased language, and adopting a tool to ensure inclusivity in decision making process regarding City grant funding.	Addresses identified impediments to fair housing such as: limited community awareness about fair housing protections and resources, instances of discrimination in housing transactions, and a lack of affordable housing.

E. Disallow SFD in High Density R-3 Zone	The City can evaluate changes to Ashland's zoning code to disallow single-family detached housing in the High-Density Residential Plan Designation (R-3 zone).	Preserves this zone for higher-density housing.
F. Evaluate increasing allowances for residential dwellings in commercial and employment zones	The City could evaluate increasing allowances for residential dwellings in commercial and employment zones, such as removing residential density caps and allowing an increased amount of residential uses in ground floor commercial spaces.	Encourages the development of more dense multifamily housing in commercial and mixed-use zones
G. Maintain quality and support preservation of existing manufactured home parks	The City could work with owners and nonprofit organizations to support preservation efforts. The City could also change the zoning code to only allow manufactured housing in manufactured home parks, encouraging preservation of manufactured home parks.	Preserves existing manufactured home parks, which play a significant role in providing naturally occurring affordable housing.
H. Increase development capacity of MFR dwellings through changes to the Land Use Ordinance	The City could amend the Land Use Ordinance to allow for a wider range of development. Zoning changes could include increased density, increased allowable height, and reduced parking requirements	Allows for a wider range of development will help ensure there are development opportunities for needed housing types.
I. Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing	Offers multi-unit developers that meet City-set affordability criteria a partial property tax exemption	Provides a way to leverage private, market-rate development to expand affordable housing.
J. Preserve and improve existing low-cost, unregulated, rental housing	The City could evaluate programs, technical assistance opportunities, regulatory changes, and other options to support property improvements. The City could provide grant funding in support of rehabilitation, weatherization or accessibility upgrades.	Supports needed repairs for low-cost unregulated housing without displacing tenants.
K. Work with partners to support development of additional permanent supportive housing	The City would work with service providers to identify and utilize funding and development assistance opportunities.	Supports development of income-restricted housing that includes services with a goal of ending chronic homelessness.

L. Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development	The City can evaluate opportunities to incorporate elements of the Climate and Energy Action Plan CEAP into housing developments. The City could also facilitate access to energy efficiency incentives available from the federal and state government, particularly for development of affordable housing.	Helps the City meet its CEAP goals and can lower-long term energy costs.
M. Establish a Construction Excise Tax	Construction Excise Tax (CET) is one of few options to generate additional locally-controlled funding for affordable housing. The funds from the CET are required by State law to be spent on developer incentives, supporting affordable housing programs, and homeownership programs.	The City could use CET revenue funds to support the development or re-development of affordable housing.
N. Evaluate using Urban Renewal	The City will evaluate the potential to use Urban Renewal to support infrastructure and affordable housing. The City would need to develop and implement an Urban Renewal Plan, establish an Urban Renewal Agency, and select projects to fund through Urban Renewal.	Provides a flexible funding tool that can support many of the key strategies identified in the Housing Production Strategy.
O. Identify additional funds to support the Affordable Housing Trust Fund	The City will identify and evaluate new sources of funding for income-restricted affordable housing, such as a General Obligation Bond.	Identifying additional funding sources for Ashland's Affordable Housing Trust Fund would provide direct financial resources to the development of affordable housing for low-income households.

How do the actions work together?

Delivering housing that is affordable to low-income households requires a variety of strategies that address key housing needs in the city. The City's strategies are intended to provide incentives and support at various phases of a development project and help overcome obstacles and challenges, making development more financially feasible. The strategies are intended to reduce housing costs and ensure that rents or sales prices are more affordable by making it more financially feasible to build and preserve affordable housing.

The City developed four initiatives that address key housing needs in the city, focusing on outcomes of implementing the actions. The initiatives comprise a set of potential city-led strategies, funding sources, and potential partnerships with other entities that help to achieve an overarching goal. By bundling strategies and funding sources, the City acknowledges that several strategies and partnerships are necessary to achieve the City's housing goals.

- **Encourage development of low- and moderate-income affordable rental housing.** This initiative seeks to increase the housing options for unregulated rental households earning between 60% and 120% of MFI (\$43,900 to \$87,700).
- **Increase opportunities for affordable homeownership.** This initiative seeks to increase the housing options for homeownership for households earning less than 120% of MFI (less than \$87,700).
- **Encourage development of income-restricted affordable housing units.** There are limited options available in Ashland that are affordable to households with income of less than 60% of MFI (\$43,900). This initiative supports development of housing affordable in this income group.
- **Preserve existing of low- and moderate-income affordable housing.** This initiative seeks to increase the housing options for households earning less than 120% of MFI (less than \$87,700).

Exhibit 2. Housing Initiatives, Potential Actions, and Proposed Adoption

■ Primary Focus of the initiative □ Secondary Focus of the initiative

Action Name	Initiative Name				Proposed Adoption Timing
	Encourage development of low- and moderate-income affordable rental housing	Increase opportunities for affordable homeownership	Encourage development of income-restricted affordable housing units	Preserve existing supply of low- and moderate-income affordable housing	
A. Evaluate participating in or establishing a land bank.	■	■	■		2026*
B. Evaluate opportunities to participate in a land trust.	■	■			2025*
C. Host educational events with the Housing and Human Services Advisory Committee or other organizations	□	■	■	■	Ongoing
D. Develop an equitable housing plan	□	■	■	■	2024
E. Disallow SFD in High Density R-3 Zone	■		□	□	2027
F. Evaluate increasing allowances for residential dwellings in commercial and employment zones	■				2025
G. Maintain quality and support preservation of existing manufactured home parks		□		■	2024
H. Increase development capacity of MFR dwellings through changes to the Land Use Ordinance	■		■		2027
I. Implement the Multiple Unit Property Tax Exemption (MUPTEx) to support multifamily or affordable housing	■			□	2028
J. Preserve and improve existing low-cost, unregulated, rental housing				■	2026*
K. Work with partners to support development of additional permanent supportive housing			■		Ongoing
L. Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development	■	■	□		2029*
Funding Sources					

Action Name	Initiative Name				Proposed Adoption Timing
	Encourage development of low- and moderate-income affordable rental housing	Increase opportunities for affordable homeownership	Encourage development of income-restricted affordable housing units	Preserve existing supply of low- and moderate-income affordable housing	
M. Establish a Construction Excise Tax	■	■	■	■	2025
N. Evaluate using Urban Renewal	□	□	■	■	2028
O. Identify additional funds to support the Affordable Housing Trust Fund	■	■	■	■	2025*

*The implementation schedule for these actions involves getting policy direction from City Council during this year, not adoption. Some of these actions do not require adoption of an ordinance, others may not result in adoption of an ordinance depending on the direction provided by City Council.

How will the City implement the Strategy? Who are the partners?

Each of the strategies require a different implementation approach, with varying involvement from local partners. The city has identified strategies that it can use to best support the development of affordable housing, but the delivery requires the participation of key partners who have roles essential to the construction, delivery, and preservation of housing units.

Exhibit 3. City and Partner Roles in Implementation

Actions	City	Other Government Agencies	Affordable and Market Rate Developers	Local Nonprofits	Other
A. Evaluate participating in or establishing a land bank.	Contribute land or funding		Develop housing		
B. Evaluate opportunities to participate in a land trust.	Contribute land or funding		Develop housing	Manage Land Trust	
C. Host educational events with the Housing and Human Services Advisory Committee or other organizations	Partner to identify needs, develop materials, do outreach and plan/host events			Partner to identify needs, develop materials, do outreach and plan events	Coordinate with HHSAC
D. Develop an equitable housing plan	Develop plan, adoption, implementation,	Provide input	Provide input	Provide input	Coordinate with HHSAC
E. Disallow SFD in High Density R-3 Zone	Revise development code				
F. Evaluate increasing allowances for residential dwellings in commercial and employment zones	Revise development code				
G. Maintain quality and support preservation of existing manufactured home parks	Revise development code; outreach to property owners and nonprofits	OHCS: partnership on preservation efforts		Partnership on preservation efforts	Owners of manufactured home parks: provide input
H. Increase development capacity of MFR dwellings through changes to the Land Use Ordinance	Revise development code		Provide input		

I.	Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing	Outreach, develop eligibility criteria, adoption, implementation, promotion	Taxing Districts: consider exemption approval	Provide input		
J.	Preserve and improve existing low-cost, unregulated, rental housing	Develop program; funding; outreach & promotion	Ashland Housing Authority: provide input & materials; outreach		Partnership; provide input & materials; outreach	Property owners
K.	Work with partners to support development of additional permanent supportive housing	Provide funding and development assistance opportunities	Jackson County: partnership to develop regional approach.		Service providers: identify and utilize funding and development assistance opportunities.	
L.	Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development	Evaluate opportunities; determine implementation steps and identify partners	Ashland Conservation Division, Electric Department, Building Division: provide input	Provide input		Ashland Climate Policy Commission: provide input
Funding Sources						
M.	Establish a Construction Excise Tax	Develop and implement plans		Provide input		Major employers, and the business community: provide input
N.	Evaluate using Urban Renewal or other financing tools	Establish and partner w/Urban Renewal Agency	URA: Select projects; implement the Plan			Property owners
O.	Identify additional funds to support the Affordable Housing Trust Fund	Evaluate new sources of funding, develop, and implement plan				Residents: provide input

1. Introduction

The City of Ashland has sponsored several housing planning efforts over the last several years to address housing access, quality, and affordability concerns. While the City has accomplished much to date, there is still work to be done to ensure Ashland's existing and future housing needs are met. Ashland developed and adopted a Housing Capacity Analysis in 2020, which provided information about the City's unmet housing needs. To build on their progress, the City applied for a grant with the Department of Land Conservation and Development in 2021 to develop a Housing Production Strategy.

A Housing Production Strategy (HPS) is intended to include goals and strategic actions to work together to achieve equitable outcomes for all residents of Ashland, with an emphasis on improving outcomes for underserved communities, lower-income households, and people in state and federal protected classes. An HPS considers issues of Fair Housing, which is intended to provide access to housing choice by everyone, free from discrimination. Federal protected classes are: race, color, national origin, religion, gender, familial status, and disability. Oregon's additional protected classes are: marital status, source of income, sexual orientation and gender identity, and status as a domestic violence survivor. Under Fair Housing laws, it is illegal to deny access to housing in based on the characteristics of people within these protected classes.

This report provides information about Ashland's housing needs. It provides an understanding of the issues (in Chapter 2), before solutions are proposed (in Chapter 3). This report draws its information and findings from several documents including:

- Ashland's *Housing Capacity Analysis* (2021)
- Comprehensive Plan and Housing Element Update (2019)
- *Ashland Consolidated Plan 2020-2024* (2020)¹
- Affordable Housing Ordinance (2020)
- Rent Burden Meetings in recent years
- Missing Middle Code Update (2022)

Ashland recently completed the Ashland Housing Capacity Analysis (HCA) in 2021. Key findings from the HCA are:

- **Ashland is forecast to grow by about 858 new dwelling units between 2021 to 2041.** On average, this equates to 43 new dwelling units per year.
- **Changes in demographic characteristics will drive need for new housing.** The HCA forecast Ashland will need more attached and multifamily housing in the future than

¹ City of Ashland. (2020). Ashland's 2020-2024 Consolidated Plan.

the current housing stock provides. The key demographic trends that will affect Ashland's future housing needs are the aging of the baby boomers, the household formation of the millennials and Generation Z, and growth in Latino populations. The implications of these trends are increased demand from older (often single person and more likely to be female) households and increased demand for affordable housing for families, both for ownership and rent.

Ashland has an existing deficit of housing affordable to low- and middle-income households and is likely to have similar future deficits. Ashland's existing deficit of housing that is affordable for extremely-low and very-low income, low-income, and middle-income households indicates a need for subsidized affordable housing for renters and affordable homeownership. Without the types of solutions proposed in Chapter 3 of this report, lack of affordability will continue to be a problem and possibly will grow, in the future, if incomes continue to grow at a slower rate than housing costs.

- **Ashland has sufficient land within the urban growth boundary to support development over the next 20 years.** Ashland's HCA shows that the City can accommodate growth (858 dwelling units) over the next 20-years with a surplus of capacity remaining. However, some development in Ashland's Suburban Residential, Normal Neighborhood, and Multifamily Residential Plan Designations will need to be accommodated in the city's urbanizing area.

Requirements of a Housing Production Strategy

OAR 660-008 describes the requirements of a Housing Production Strategy (HPS) in sections 660-008-0050 through 660-008-0070. This section briefly describes these requirements and review by staff with the Department of Land Conservation and Development (DLCD).

The HPS is required to include the following information. It is noted what chapter this information is included in, in this report:

- **Unmet Housing Need in Ashland** (Chapter 2 and Appendix A in this report) should provide information about the socio-economic and demographic trends of households in Ashland, the policies the City has adopted to meet housing needs, and a summary of engagement the City has had with stakeholders about housing needs (especially with stakeholders in underrepresented groups).
- **Actions to Meet Future Housing Need** (Chapter 3 in this report) identifies specific actions, measures, and policies needed to address housing needs identified in Ashland's HCA report.
- **Achieving Fair and Equitable Housing Outcomes** (Chapter 4 in this report) evaluates the entire list of strategies to achieve equitable outcomes. The valuation considers factors such as location of housing, Affirmatively Furthering Fair Housing, facilitating housing choice, identifying housing options for residents experiencing homelessness, supporting development of affordable housing, and increasing housing stability.

The City is required to submit the HPS to DLCD after its adoption by the City Council. The City is then required to monitor progress on implementation of the HPS and progress on production of housing related to the policies and actions in this report. Linking housing development directly to implementation of the actions in this report may be challenging and difficult to quantify. But City staff will be able to report changes in building activity that occur before and after implementation of specific actions and will be able to provide qualitative feedback on implementation of actions based on development of partnerships and discussions with stakeholders.

Ashland will be required to submit a report to DLCD four years after the City adopts the HPS that includes:

- A **summary** of the actions taken by that time. For actions not adopted on the schedule in the HPS, the city must provide an explanation of the circumstances that posed a barrier to implementation and a plan for addressing the need identified in the strategy.
- An **evaluation** of the efficacy of the actions that the city has implemented for meeting the needs in the HCA and whether the actions are moving the city to achieve more fair and equitable housing outcomes.

Implementation of the HPS will take time because each action will require further consideration, such as additional analysis, engagement of consultants, changes to existing standards or programs, discussions with decision makers, or public hearings. The City may be unable or chose not to implement some of these actions because of new information that arises from further consideration about the specifics of each action.

If the City is unable to or chooses not to implement an action within 90 days of the timeline proposed in the HPS, the City must notify DLCD about the action(s) that the City is taking to address this issue. The City may propose an alternative schedule for implementing the action or may identify a different action (or actions) to meet the specific housing need addressed by this action.

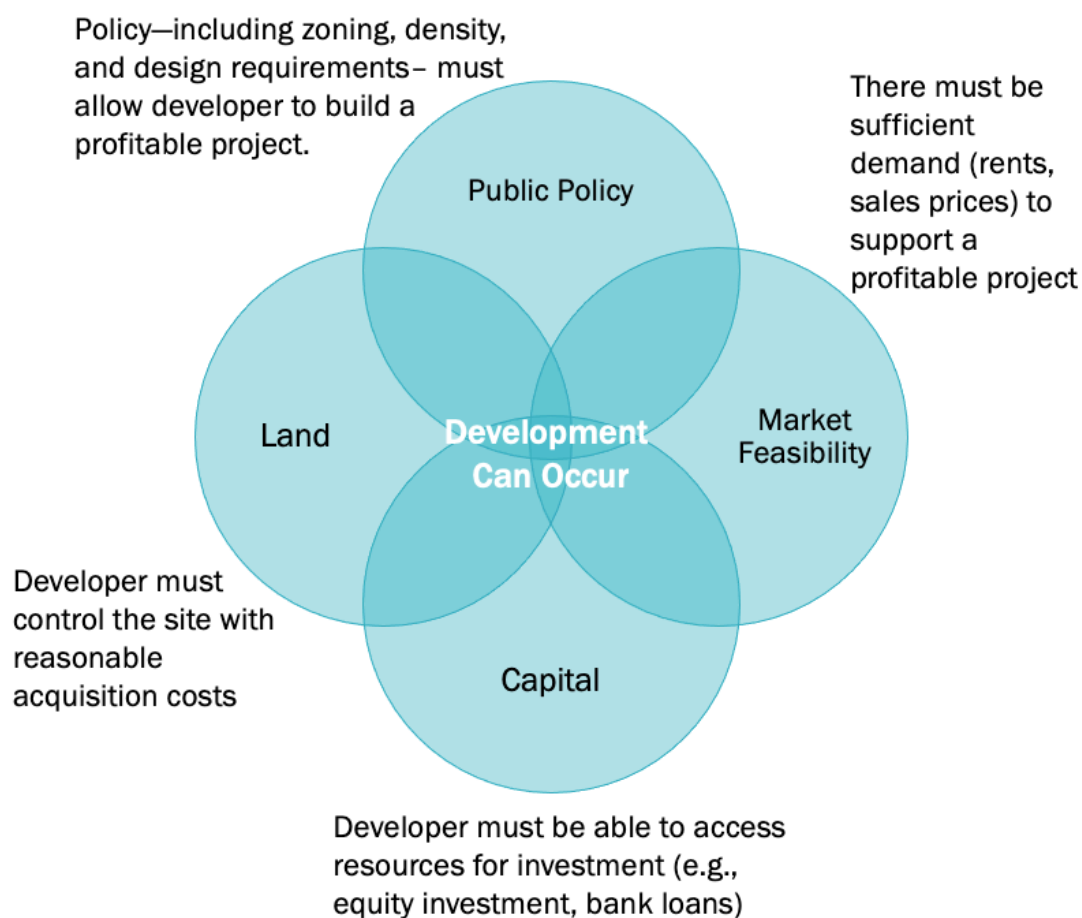
Considerations for Implementing the Housing Production Strategy

As part of development of the HPS, it is important to understand a city's role in housing development. Supporting and leveraging the private market's ability to deliver market-rate development at the broadest possible range of price-points is critical to increase the supply of housing more broadly, especially in light of the limited public funding available to support income-restricted housing. In an area with a reasonably strong housing market, a city's influence over market-rate development is substantial, despite the number of factors that the city does not control. The graphic in Exhibit 4 illustrates how four factors must intersect so that development can occur, and where the City has most influence.

Cities do not control all of these factors entirely. Public policy at the local level is shaped through state policy. Land is generally controlled by the individual landowners and development of infrastructure necessary to make land development can be prohibitively expensive. Market feasibility is largely affected by market forces, such as construction costs and achievable rents. Access to capital is largely controlled by investors and banks. However, cities can directly influence public policy (through its development code) and availability of land (through zoning, density, planning for new land needed for housing, redevelopment, government owned surplus land, potential urban renewal and other types of projects and acquisitions, and infrastructure planning). Cities can also have a limited influence on market feasibility (through policies that reduce costs like tax abatements or waiving fees).

Exhibit 4. Four Necessary Factors that Allow Development of New Market-Rate Housing

Source: ECONorthwest



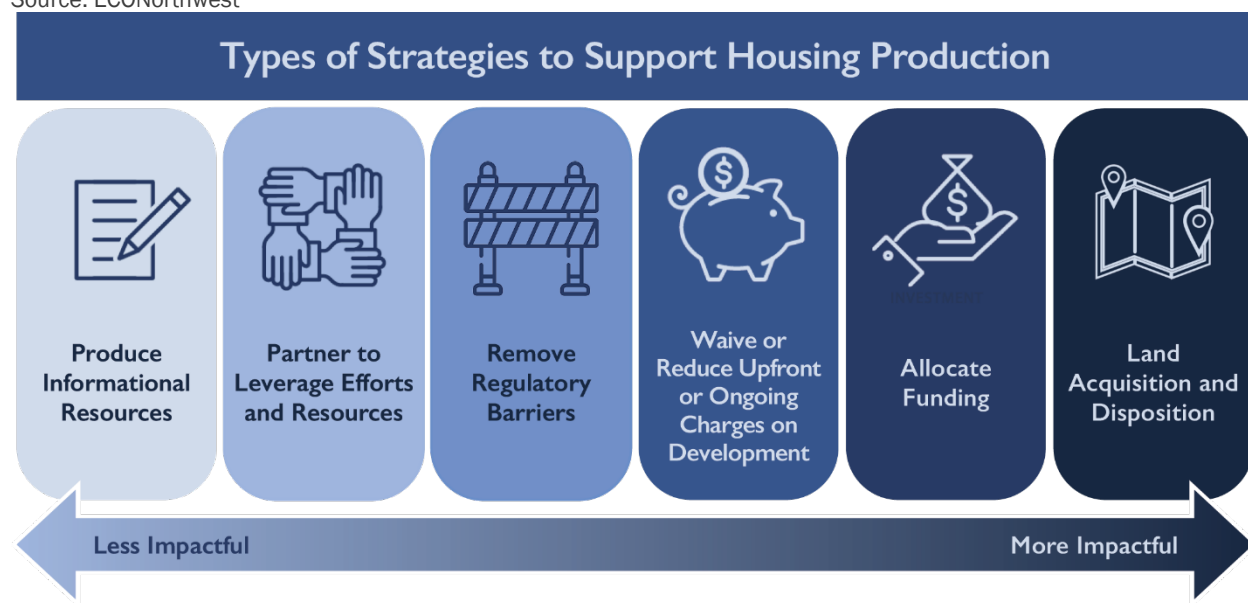
These factors all suggest that the City should consider a wide range of actions. Exhibit 5 shows the range of strategies, characterizing some strategies as more impactful and some as less impactful. More impactful strategies are those that provide funding or direct resources to support housing development (like land acquisition and disposition). These strategies are more impactful because funding and resources are the greatest constraint on development of income-

restricted affordable housing (such as housing affordable to households with incomes below 80% of MFI).

While removing regulatory barriers and partnerships are shown as less impactful strategies, they are often necessary (but not sufficient on their own) to support housing development. For example, increasing allowable densities, on its own, result in new affordable being built. The City needs other strategies to support development of affordable housing for people to live and work in Ashland.

This example also underscores the fact that many of the actions presented in this chapter build on each other. While a partnership on its own may not be sufficient to support development of housing, it may be key when combined with other actions.

Exhibit 5. Types of Strategies to Support Housing Production
Source: ECONorthwest



Building Equity into the HPS

Equity is both an outcome and a process. As an “outcome,” equity means that race or other markers of social identity would no longer predict one’s life outcomes (for instance in health, socioeconomic advantages, educational access, life expectancy, etc.). Achieving that outcome remains a challenge because our economic systems were, often unintentionally, designed and built to maintain inequality—and they continue to do so.

To achieve equitable outcomes, equity is also a process that people undertake to better understand, question, and disrupt historical and contemporary inequitable systems and structures. We can use this process to create policies that are based in equal opportunity and resources, and we can ensure that those most impacted by policies and practices are meaningfully involved in their creation and implementation.

Equitable housing goes beyond affordability. It aims to ensure all people have housing choices that are diverse, high quality, energy efficient, physically accessible, and reasonably priced, with access to employment opportunities, services, and amenities. This includes reducing rates of cost burden and increasing access to homeownership, especially for low-income households and vulnerable groups such as seniors, workers with low pay, people with disabilities, and communities of color. This broad definition of equitable housing includes choices for homes to buy or rent that are reasonably priced (relative to income) and accessible across all ages, household sizes, abilities, and incomes and are convenient to everyday needs such as schools, childcare, food, and parks.

Exhibit 6 provides an equity framework to increase the consideration of equity in the project process and implementation (including measuring impact). Creating equitable processes will help ensure that diverse and underrepresented communities (including vulnerable and low-income communities) are able to influence and inform policy and program development.

Exhibit 6. Housing Production Strategy Equity Framework

Identify Unmet Housing Needs	Engagement Process ²	HPS Plan Development	Measurement and Analysis
Identify unmet housing needs, such as lower-income cost-burdened households Identify vulnerable people within the community who are at risk or who could benefit from access to more affordable housing	Engage community members to learn about their priorities, needs, and challenges to affordable housing Build community awareness and support through the engagement process Continue engagement in implementation of the actions within the HPS	Ensure that the actions in the HPS address Ashland' unmet housing needs Identify outcomes within the HPS that respond to community needs and promote housing stability and choice, particularly for those households with the unmet housing need.	Develop measurements to understand the impact and progress toward increasing equity of the actions

The HPS was developed within this equity framework. The actions in the HPS are intended to increase equitable housing outcomes as the City implements the recommendations of the HPS.

Stakeholder Involvement in Developing the HPS

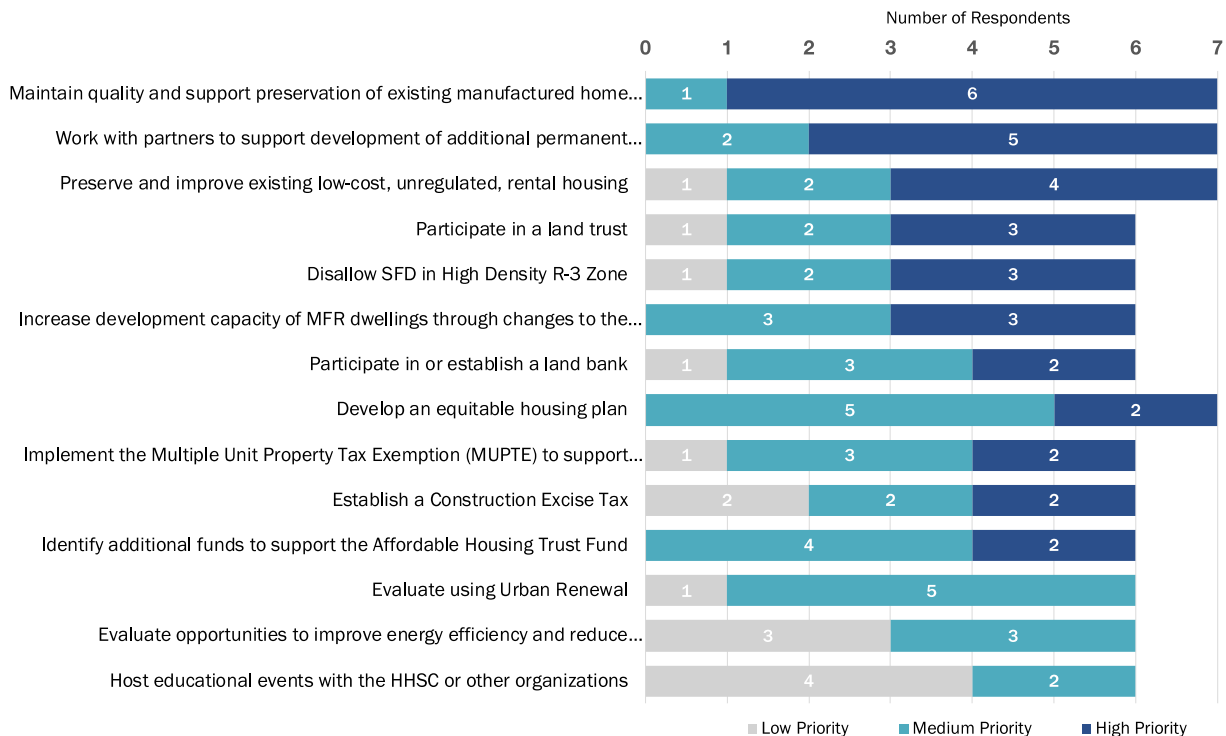
A key part of developing the HPS was consulting community members to learn about their priorities, needs, and challenges related to affordable housing. The stakeholder outreach process for developing the HPS was collaborative and included input from the following groups:

² Engagement builds on prior engagement that the City has done on other housing and community development projects, such as work on the Ashland Consolidated Plan. It also includes engagement conducted as part of the HPS project. Implementation of the HPS will include additional engagement.

- **Ashland’s Housing Advisory Committee.** The project included five meetings with the Advisory Committee over the course of the project. The advisory committee consisted of ten community members with diverse backgrounds related to housing issues in Ashland. The committee met throughout the development of the HPS, to review the draft list of housing actions, identify gaps in the list and potential strategies to fill in gaps, refine the list of strategies and to provide input in the draft HPS document. According to a survey of Advisory Committee in October 2022, the highest priority housing actions included:
 - Maintain quality and support preservation of existing manufactured home parks and support development of new manufactured home parks.³
 - Work with partners to support development of additional permanent supportive housing.
 - Preserve and improve existing low-cost, unregulated, rental housing.

The full results of the AC survey are shown in Exhibit 7 below.

Exhibit 7. Advisory Committee Housing Action Priority Survey



- **Discussions with Stakeholders.**

³ At the April 17, 2023 meeting, the City Council removed “support development of new manufactured home parks” portion of this action.

- **Service providers** for vulnerable populations, to better understand the range of unmet housing needs for people experiencing houselessness, students, low-income renter and homeowner households, and other special needs populations. These discussions identified several actions to better support and coordinate with providers. Some of the actions discussed include:
 - Increasing partnership opportunities, such as partnering to undertake trainings to serve vulnerable populations,
 - Regular meetings and coordination with the City to discuss needs and opportunities, and
 - Funding for emergency weather related shelter coordination in a model like the one the City of Medford has with Access.
- **Local housing developers and builders** The project included five interviews with stakeholder groups, including developers, builders, planners, and architects, to solicit feedback on potential strategies and housing development barriers in Ashland. Key suggestions from these interviews included:
 - Urban Renewal has been effective in facilitating development in neighboring jurisdictions and could be a useful tool in Ashland.
 - Land banking could allow developers to construct more workforce housing.
 - Review the code for unintended barriers to density.
 - Evaluate opportunities to streamline development review.
 - Modifications to code requirements for Cottage Housing and ADUs could make these housing types more feasible.
- **Open house.** A virtual open house was held in October 2022. The open house included a presentation on housing needs in Ashland and shared information about the strategies the city is considering to meet unmet housing needs. The presentation included a brief survey for participants to share the priorities around potential housing strategies.
- **Planning Commission** – The project included four meetings with the Planning Commission. The meeting topics included 1) the project overview and associated stakeholder and community engagement, 2) strategies to accommodate housing need in Ashland, 3) reviewing the draft HPS and 4) reviewing the final HPS.
- **Housing and Human Services Advisory Committee.** The project included two presentations and one meeting with the Housing and Human Services Advisory Committee (HHSAC). The HHSAC recommended prioritizing nine strategic actions for inclusion in the Housing Production Strategy document. The HHSAC recommended tiering those nine strategies in order of highest priority, as follows:
 - Tier one (highest priority) strategic actions includes:
 - Identify additional funds to support the Affordable Housing Trust Fund

- Maintain quality and support preservation of existing manufactured home parks and support development of new manufactured home parks⁴
- Participate in a land trust
- Participate in or establish a land bank.
- Tier two includes:
 - Establish a construction excise tax
 - Disallow SFD in high density R-3 zone
- Tier three (lower priority) includes:
 - Evaluate using urban renewal
 - Implement the Multiple Unit Property Tax Exemption
 - Increase development capacity of MFR dwellings through changes to the Land Use Ordinance

These strategic actions were recommended with the understanding that the HHSAC's priorities should not be construed as eliminating or diminishing the remaining strategies. The motion was approved unanimously.

- **City Council.** The project included three meetings with City Council. On the August 2022 presentation, Council provided the following feedback:
 - Council was supportive of:
 - Land banking
 - Land trust - they were very interested in long-term affordability
 - Preservation of manufactured home parks
 - Evaluating using Urban Renewal
 - Potentially using a CET
 - Council asked why there wasn't inclusion of:
 - Pre-approved ADU and Missing Middle Plan Sets⁵

⁴ At the April 17, 2023 meeting, the City Council removed "support development of new manufactured home parks" portion of this action.

⁵ This strategy was included as a recommendation in the HPS but not specified as an action that would be implemented in the HPS because pre-approved plan sets may be less effective in supporting these types of housing developments because there may be substantial variation in development of Middle Housing types because each development is likely to have unique challenges.

- Universal design as a strategy for inclusion⁶
- Council discussed, and some suggested removing, inclusionary zoning⁷
- The Housing and Human Services Advisory Committee also conducted a survey to gauge the public's priorities around housing issues, including gauging public opinions about potential HPS strategies. Of the 236 responses, respondents overwhelmingly cited the biggest housing barrier in Ashland was *'there are no available rentals or properties for sale within my price range'*. Over 50 percent of respondents thought the following strategies would make a significant positive difference in improving housing options for residents of Ashland:
 - Create policy that supports the construction different types of homes and broadens what is acceptable as a "dwelling unit:" Examples: cottages, accessory dwelling units, duplexes, triplexes, manufactured home parks, tiny homes, 3D printed homes, domes, repurposed cargo containers, etc.⁸
 - Limit the number of vacation rentals as well as limiting the converting existing housing into vacation rentals.
 - Require private developers to include a percentage of affordable housing units in projects that would contain more than 20 dwelling units, referred to as "Inclusionary zoning".
 - Support using city-owned land for the construction of affordable housing.
 - Support and fund non-profit organizations who build new housing that people of varied income levels can afford.

How stakeholder involvement influenced the Housing Production Strategy

Stakeholders helped identify the actions in the HPS, refine the details of each action, and develop the implementation schedule. The HPS built off of prior stakeholder engagement about housing needs conducted by the City (as described in Section 2 of this report), and the policies from those previous engagement processes were used to identify potential HPS actions at the

⁶ Accessibility language is included under the "Preserve and improve existing low-cost, unregulated, rental housing" strategy. Following Council's comment, language was also added to the "Equitable Housing Plan" strategy a regarding promotion of Universal Design policies or goals to address equity for people with disabilities.

⁷ Inclusionary zoning was removed as a potential strategy from the HPS after discussion with City staff because of the requirements in Oregon's Inclusionary Zoning statutes that limit it to use on multifamily buildings with 20 or more units. Ashland has had very few multifamily developments over 20 units per structure in the last decade. As a result, implementing inclusionary zoning would likely have little effect and may discourage development of multifamily buildings with 20 or more dwelling units. .

⁸ "Broaden the types of dwelling units allowed by Ashland development code" was initially considered as a strategy in this HPS. After discussion with city staff, it was removed as a strategy because it was determined that the barrier to these alternative building types is not Ashland code but state building code requirements.

beginning of the HPS project. The AC then provided input on, and revised, the list of potential actions. The Planning Commission, City Council, and the HHSAC provided input to refine the details of the preliminary housing actions. A survey during the City's Online Open House gave the public opportunity to weigh in on housing needs and potential actions, and the responses from that survey, though few in number, were used to help prioritize housing actions in the HPS. The AC and HHSAC both ranked strategies based on their priorities, and those responses helped develop the implementation schedule. Interviews with housing developers and service providers helped identify barriers to housing development and further refine details of the housing actions to address those barriers. The AC, Planning Commission, HHSAC, and City Council were all given an opportunity to review and provide comments on a full draft of the HPS, and their feedback was incorporated into the document before it was finalized.

How to continue and improve engagement practices for future housing efforts conducted by the City.

As City staff implement the HPS, they should continue to engage with the stakeholders who advised on the development of the HPS to help guide, gather input on, and monitor impacts of the City's housing efforts. Housing developers, such as those interviewed for this project, can provide valuable input on efforts to streamline the development process and promote housing development. The city could also work with service providers, such as those interviewed for this project, to understand how to better support their work, and partner with them to conduct engagement and share information. The City could also identify and work with community land trusts and other community-based organizations that could be potential partners for actions in the HPS and help them build a presence and capacity to work in Ashland. Lastly, city staff should continue efforts to engage and develop relationships with underrepresented populations in Ashland.

Structure of the Report

The structure of this report is organized as follows:

- **Chapter 2. Contextualizing Housing Need** summarizes the findings about housing need in Ashland, with a focus on housing need at varying income levels and housing needs of specific groups of people.
- **Chapter 3. Actions to Meet Future Housing Need** presents the proposed policies and actions to meet the housing need described in Chapter 2.
- **Chapter 4. Evaluation: Achieving Fair and Equitable Housing Outcomes** presents an evaluation of the HPS through considerations of the location of housing, Fair Housing, housing choice, and other factors.
- **Appendix A. Contextualizing Ashland's Housing Needs** presents the data and analysis necessary to understand Ashland's housing needs in more detail.
- **Appendix B. Trends in Gentrification and Displacement Risk** presents an analysis of trends in gentrification and displacement risk developed for Ashland as part of the HPS.

2. Unmet Housing Need in Ashland

The Ashland Housing Capacity Analysis (HCA) describes the housing needs of current and future residents of Ashland based on some demographic and socioeconomic characteristics, such as age and income. It does not provide detailed data about housing needs for other demographic characteristics, such as race, ethnicity, people with a disability, or people experiencing homelessness.

This chapter provides additional information about the housing needs by income, age, race, ethnicity, disability and for people experiencing homelessness. It uses standard sources of information from the U.S. Census. It adds information from other sources, such as Oregon's Housing and Community Services Department, the United States Department of Housing and Urban Development, Costar, and the City of Ashland. This chapter meets the HPS requirement to further contextualize housing need, beyond what the HNA provided.

This chapter presents a description of the housing needs that the Housing Production Strategy is intended to address, as well as existing policies to address Ashland's housing needs. It ends with a summary of the existing and expected barriers to development of needed housing.

Housing Needs Addressed by the Housing Production Strategy

This section describes Ashland's housing needs based on data gathered in the Ashland Housing Needs Analysis report, household income shown in Exhibit 8 and on additional analysis of unmet housing needs for underserved groups (based on analysis in Appendix A).

Across Oregon, developers have been able to build some types of housing without need for public intervention, such as single unit detached housing that is affordable to people with higher incomes. However, many low- and middle-income houses have unmet housing needs because the market has been unable to keep up with their needs.

The HPS focuses on actions that ensure that developers can produce housing for low- and middle-income households. Housing at this part of the income spectrum, and housing that meets the special needs of specific groups, usually requires public intervention.

Defining Median Family Income

The Housing Production Strategy is intended to develop policies and actions that address Ashland's housing needs. Throughout this report, we discuss housing affordability based on Median Family Income (MFI) that is defined by the U.S. Department of Housing and Urban Services (HUD) for Jackson County for a household of four people. The terms used to describe housing affordability by income group are:

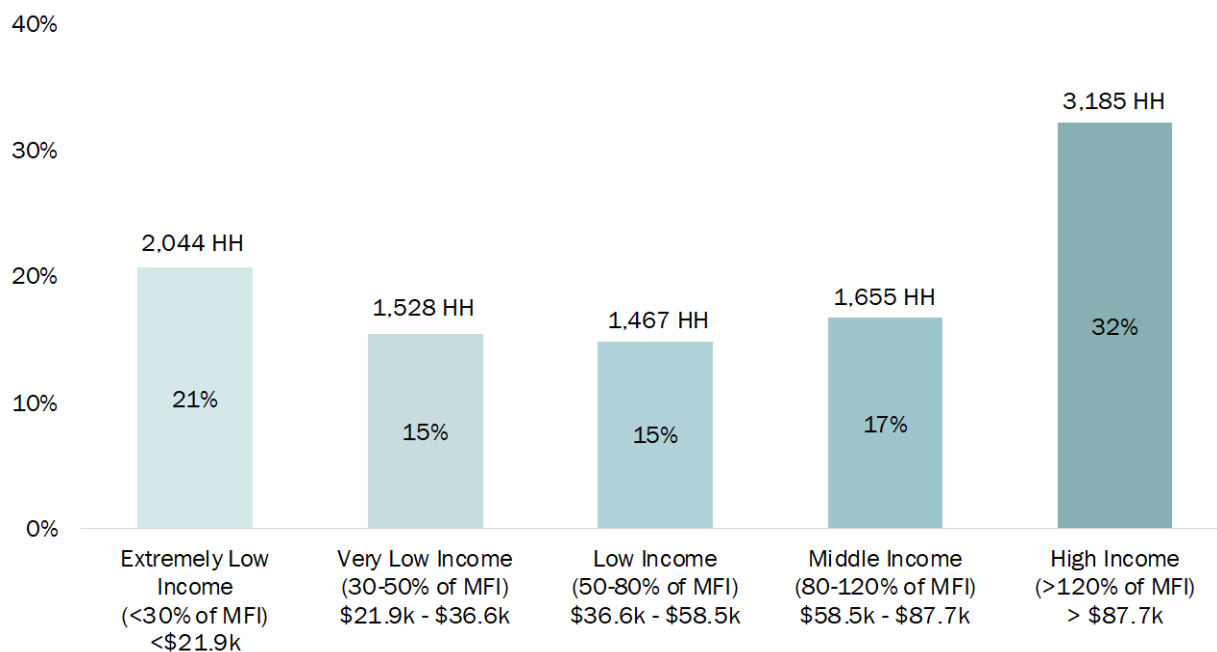
- Extremely Low Income: Less than 30% MFI or \$21,900 or less for a household of four
- Very-Low Income: 30% to 50% of MFI or \$21,900 to \$36,600 for a household of four
- Low Income: 50% to 80% of MFI or \$36,600 to \$58,500 for a household of four
- Middle Income: 80% to 120% of MFI or \$58,500 to \$87,700 for a household of four
- High Income: 120% of MFI or more \$87,700 or more for a household of four

Over one-third of Ashland households earn less than 50% MFI.

Exhibit 8 shows that 36% of Ashland’s households had incomes less than 50% of Median Family Income (MFI) (\$36,600) and cannot afford a two-bedroom apartment at Jackson County’s Fair Market Rent (FMR) of \$1,195 in 2022.

Exhibit 8. Share of Households by Median Family Income (MFI) for Jackson County (\$73,100), for a household of four, Ashland, 2021

Source: Analysis by ECONorthwest; U.S. Department of HUD, Jackson County, 2021. U.S. Census Bureau, 2015-2019 ACS Table 19001.



Median Family Income varies by household size.

The actual income thresholds vary in MFI based on household size. For example, a household of one person with an income of 80% of MFI has an income of \$40,940 compared to the income for a household of four (\$58,480) or a household of six people (\$67,855). The housing needs for a single person are also different than those of a household of four people or six people.

Throughout this document, we use the income for a household of four to illustrate housing needs, but MFI varies by household size, as does the size and other characteristics of housing need.

Exhibit 9 Median Family Income and housing affordability by Household size, Jackson County (Medford-Ashland MSA), 2021

Source: Analysis by ECONorthwest; U.S. Department of HUD, Jackson County, 2021.

	30% MFI	60% MFI	80% MFI	100% MFI	120% MFI
1-person					
Annual Income	\$ 15,351	\$ 30,707	\$ 40,940	\$ 51,170	\$ 61,404
Affordable Monthly Housing Cost	\$ 384	\$ 768	\$ 1,023	\$ 1,279	\$ 1,535
2-people					
Annual Income	\$ 17,544	\$ 35,106	\$ 46,799	\$ 58,480	\$ 70,176
Affordable Monthly Housing Cost	\$ 439	\$ 878	\$ 1,170	\$ 1,462	\$ 1,754
4-people					
Annual Income	\$ 21,930	\$ 43,860	\$ 58,480	\$ 73,100	\$ 87,720
Affordable Monthly Housing Cost	\$ 548	\$ 1,097	\$ 1,462	\$ 1,828	\$ 2,193
6-people					
Annual Income	\$ 26,906	\$ 50,890	\$ 67,855	\$ 84,796	\$ 101,755
Affordable Monthly Housing Cost	\$ 673	\$ 1,272	\$ 1,696	\$ 2,120	\$ 2,544

Many households in Ashland pay more than 30% of their income for housing.

Because the local housing market cannot produce income-restricted, subsidized affordable housing (housing affordable at 60% or less of MFI) at sufficient levels – and because it cannot often produce low income/workforce housing (housing affordable at 60% to 80% of MFI) without subsidy, many households in Ashland are cost burdened.

A household is defined as cost burdened if their housing costs exceed 30% of their gross income. A household that spends 50% or more of their gross income on housing costs is said to be severely cost burdened.

Low-income households have few options for either homeownership or rental units.

Housing costs for both rental and ownership units are much higher than many residents can afford. Exhibit 10 shows financially attainable housing costs for households across the income spectrum in Jackson County. For example, a household earning median family income in Jackson County (about \$73,100 per year)⁹ can afford a monthly rent of about \$1,830 or a home roughly valued between \$256,000 and \$292,000 without cost burdening¹⁰ themselves.

Fewer than one-quarter of Ashland's households have income sufficient to afford housing sales prices in Ashland. About one-thirds of Ashland households are unable to afford the average asking rent in Ashland without cost burden.

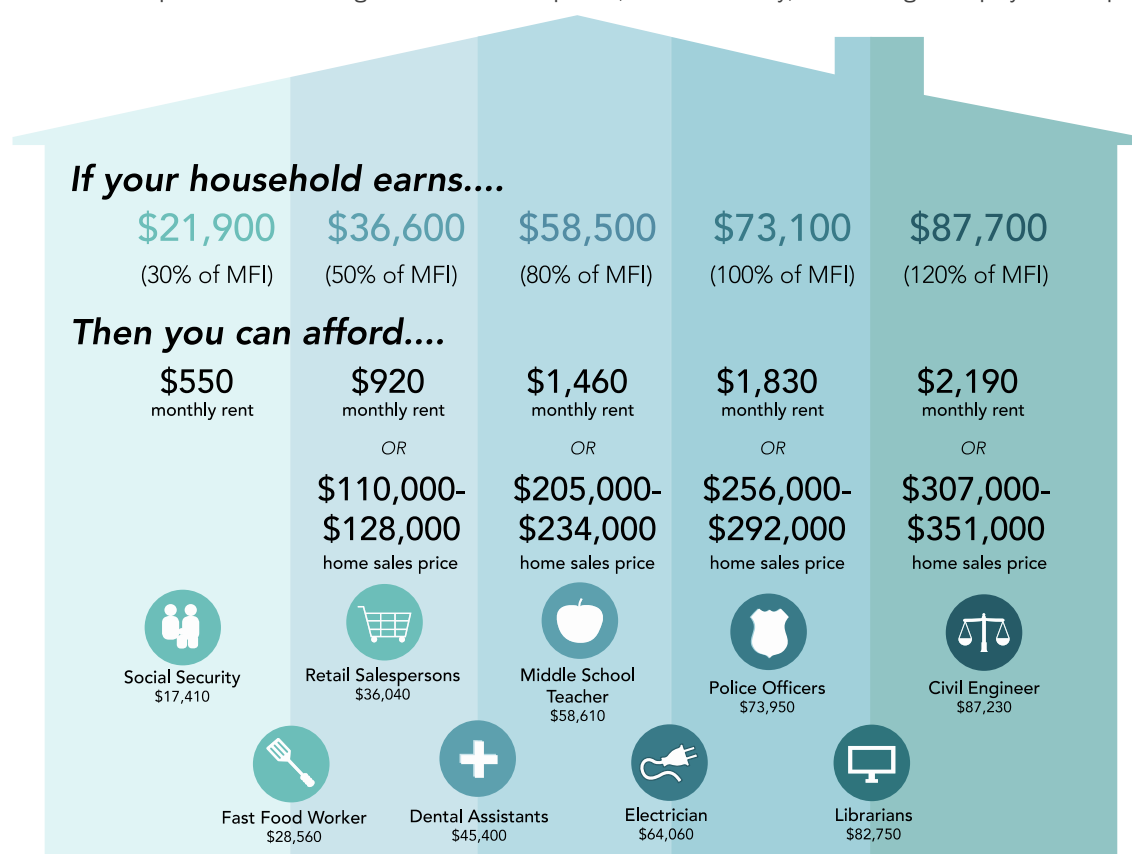
⁹ Note that Median Family Income for the region is different than Median Household Income (MHI) for Ashland (see Exhibit 31). MFI is determined by HUD for each metropolitan area and non-metropolitan county. It is adjusted by family size – in that, 100% MFI is adjusted for a family of four.

¹⁰ A household is considered cost burdened if they spend more than 30% of their gross income on housing costs, a standard set by the U.S. Department of Housing and Urban Services to measure housing affordability.

In Ashland, a household would need to earn at least \$140,000 (192% of MFI for a family of four) to afford the median sales price of a home in Ashland, as shown in Exhibit 53.¹¹ Rent costs are comparatively more affordable but still pose a barrier to finding affordable housing for many households. A household would need to earn about \$62,000 (85% of MFI for a household of four) to afford the average asking rent of an apartment (\$1,550 per month).¹²

Exhibit 10. Financially Attainable Housing, by Median Family Income (MFI) for Jackson County (Medford-Ashland MSA) (\$73,100), Ashland, 2021

Source: U.S. Department of Housing and Urban Development, Jackson County, 2021. Oregon Employment Department.



¹¹ With higher mortgage interest rates in 2022 and into 2023, a household may need to have higher income to afford the median home sales price.

¹² CMP Real Estate Services, Inc., December 2020.

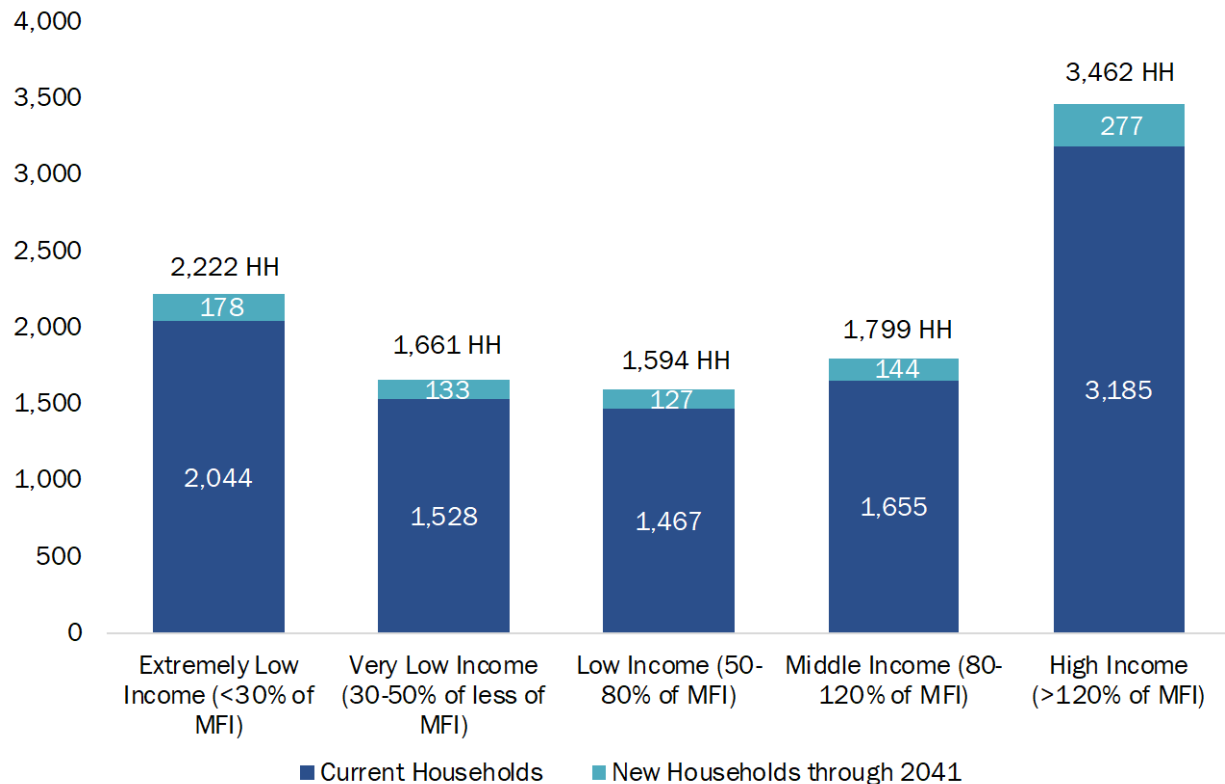
Ashland is forecast to grow by 858 new dwelling units between 2021 and 2041.

Ashland's Housing Needs Analysis projects that the City will grow by 858 new dwelling units between 2021 and 2041 to accommodate new population growth. These dwelling units will need to be available at a variety of income levels. Assuming future residents of Ashland have an income distribution that is the same as existing residents, about a third of new housing will need to be for those with very low or extremely low incomes (below 50% MFI).¹³¹⁴

Exhibit 11. Ashland's Future Households by Income, 2021 to 2041

Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table B19001, U.S. Department of HUD 2021 MFI, and PSU's Population Forecast, 2021 to 2041 as found in Ashland's Housing Needs Analysis.

Note: Median Family Income (MFI) is estimated for a household of 4.



¹³ Given the fact that incomes have grown at a relatively slow pace over the last two decades in comparison to housing costs (especially home sales prices) this may be a conservative assumption about the future affordability of housing.

¹⁴ The HPS does not anticipate building new units for all existing households in Ashland that have problems affording housing costs. But the HPS does propose actions to stabilize the housing costs of existing lower income households and may result in development of housing that is more affordable to these households, enabling them to stay in Ashland. Information about lower income households and cost burden for existing households illustrates the existing housing need in Ashland.

Housing Needs for Extremely Low Income (Less than 50% MFI) Households

What we know about the need: Within this income range, Ashland has housing need of:

- New households: **311** (from 2021-2041)
- Existing households: **3,572**

What can they afford? Rents (including basic utility costs) of not more than **\$920** per month.

- A household would need to earn **\$62,000** to afford average multi-unit rent of **\$1,550** (about 85% of MFI for a household of four). Households with incomes of less than 50% of MFI cannot afford this rent.

What will it take to meet their needs? A combination of preserving existing income-restricted affordable housing and development of new income-restricted affordable housing. Development of income-restricted affordable housing typically requires extensive subsidy, with funding from state and federal sources, in addition to any support from the city and other partners.

Housing Needs for Low Income (50-80% MFI) Households

What we know about the need: Within this income range, Ashland has housing need of:

- New households: **127** (from 2021-2041)
- Existing households: **1,462**

What can they afford? Rents (including basic utility costs) of between \$920 to \$1,460 per month.

- A household would need to earn **\$62,000** to afford average multi-unit rent of **\$1,550** (about 85% of MFI for a household of four). These households cannot afford this rent.
- Households with this income range are likely to live in rental housing predominantly.

What will it take to meet their needs? A combination of preserving existing “naturally occurring affordable housing” and development of new income-restricted affordable housing in this price range. Some households in this income range may need rent assistance, such as a Housing Choice Voucher. Development of new housing affordable in this price range generally requires some subsidy or public support, such as tax exemptions, government funding (typically federal, state, or county, with some level of local contribution being critical) reduced systems development charges, low-interest loans, philanthropic contributions, or other financial support. Funding for rental housing affordable at 60% to 80% of MFI is scarce. Homeownership opportunities for this income range will likely be related to housing developed by nonprofit organizations, possibly with some subsidy, such as through a community land trust.

Housing Needs for Middle Income (80-120% MFI) Households

What we know about the need: Within this income range, Ashland has housing need of:

- New households: **144** (from 2021-2041)
- Existing households: **1,655**

What can they afford? Rents (including basic utility costs) of between \$1,460 to \$2,190 per month.

- For the most part, these households can afford rents higher than the asking rents for a two-bedroom unit of about **\$1,550**.
- However, households in this range cannot afford the median home sales price in Ashland of **\$549,000**.
- Some households with income in the higher part of this range are likely to live in rental housing and some may be homeowners, especially people who have owned their home for years. Households with incomes in this income range are likely need assistance in attaining homeownership.

What will it take to meet their needs? Development of rental housing (without subsidy from local or state government) and lower cost housing for homeownership. Some homeownership opportunities for this income range will likely be related to housing developed by nonprofit organizations, possible with some subsidy, such as land banking or a community land trust.

Housing Needs of People of Color

What we know about the need: POC are more likely to rent their homes and to live in multifamily housing (except Asian) than the overall average in Ashland. POC in general are cost burdened more frequently than the average household. However, in Ashland the difference in cost burden rates for POC is smaller than in many of Oregon's communities. Part of the reason for this may be the small population of POC in Ashland.¹⁵

About 7% of Ashland's population identified as non-Hispanic Black, Asian, two or more races, or another race. About 7% of Ashland's population identified as Latino (any race).

What will it take to meet their needs? Addressing the affordability issues, discussed above, as well as ensuring that people of color have access to housing without discrimination. This will require increasing awareness of Fair Housing rules for property owners and managers, tenants, City decision makers, and City staff. It will also require careful decision making to change policies that have created barriers to access housing by people of color.

¹⁵ People of Color includes Black, Latino, American Indian or Alaska Native, Asian, Native Hawaiian and Pacific Islanders, and people of another or multiple races. These categories were combined due to limited data availability.

Housing Need of People with Disabilities

What we know about the need: The Census reports that about **10%** of Ashland's population have one or more disability, such as ambulatory, vision, hearing, cognitive, self-care, or independent living disabilities.

Disabilities include those that are visible, such as ambulatory or vision disabilities, and those that are not readily apparent, such as self-care, independent living, or cognitive disabilities. Other conditions may require special accommodations, such as disabling diseases or mental health conditions.

What will it take to meet their needs? Addressing the affordability issues, discussed above, as well as ensuring that people with disabilities have access to housing that addresses their disability and that they have access to housing without discrimination. This will require increasing awareness of Fair Housing rules for property owners and managers, tenants, City decision makers, and City staff. It will also require approaches that encourage development of housing with specialized design standards to accommodate special needs.

Housing Need of People Experiencing Homelessness

What we know about the need: There are approximately **831** people experiencing homelessness in Jackson County in 2021. In addition, **125** students in the Ashland School Districts experienced homelessness. The number of people experiencing homelessness in Ashland is not clearly known. In part, this is because people experiencing homelessness may move between neighboring cities.

What will it take to meet their needs? Strategies will range from emergency assistance (including rent and utility assistance), permanent supportive housing (including supportive housing with services), and improved access to an affordable unit (as discussed above).

Stakeholder Engagement about Housing Needs Conducted Before Development of the HPS

Since 2017, the City of Ashland has undertaken several strategic planning document updates and policy changes which required public engagement processes and community input.

- **Housing Element Update** – From 2017 to 2019 the City undertook an update of the Housing Element of the Comprehensive Plan. This process included a community forum and an online questionnaire as well as several public hearings.
- **5-Year Consolidated Plan** – In 2020, the City updated the 5-year Consolidated Plan for the use of Community Development Block Grant funds. This included an online questionnaire, individual stakeholder interviews and three public hearings.
- **Annual Rent Burden Public Forums** – Since 2018 the City has been holding annual rent burden public forums in accordance with HB 4006.
- **Housing Capacity Analysis** – From 2020-2021 the City worked with a consultant to complete an updated Housing Capacity Analysis which involved a subcommittee comprised of Ashland citizens, developers, land use professionals, and other community stakeholders, as well as several public hearings.
- **Middle Housing Code Update** – In 2021, the City developed new code language to establish a middle housing code in accordance with HB2001. This process took place between 2020-2021 and included several public hearings and a Development Round Table meeting.
- **Affordable Housing Program resolution and ordinance review and update** – Lastly, the City undertook a review and update of the resolution and ordinance that governs the City of Ashland Affordable Housing Program. This process included targeted public meetings with homeowners and affordable and private market housing developers as well as several public hearings before the Housing and Human Services Advisory Committee, the Planning Commission, and the City Council.

Summary of Public Feedback Themes from Recent Community Engagement Activities *(The bulleted items below include issues regularly raised by members of the public regarding needed housing and suggested policies and actions the City could explore to assist in the production of needed housing.)*

- Increase density, rezone land to ensure more multi-family zoned land/higher density zoned land, promote infill over sprawl, but only where appropriate (not in historic districts or next to existing single-family neighborhoods).
- City Planning policies should allow for more flexibility in housing type and design. More innovative alternative housing types should be allowed such as container houses, tiny houses, micro cottages. Similarly, more diversity of development and household types should be allowed, co-ops, co-housing, tiny house villages, mixed

use/commercial/residential, multi-generational households/seniors renting rooms in their homes to students, and Single Room Occupancy/boarding house type households.

- Need larger houses/units to attract families with children, but also need smaller units for the existing population of seniors and students.
- Need for more affordable housing for both rental and ownership. This is a highly prioritized need. Cost and availability of housing are consistently identified as problem areas and are prioritized for policy solutions/city support.
- The City should support alignment with the Ashland Climate and Energy Action Plan (CEAP) policies. Parks, outdoor recreation, and preservation of and access to natural areas are a high priority for the Ashland community. Eco-friendly/green housing developments, less reliance on cars, more alternative transportation friendly developments are highly prioritized.
- City should reduce parking requirements, plan for more innovative, alternative transportation options.
- Cost of public infrastructure is a barrier to development.
- City processes can be a barrier to development. The City needs to provide more information/resources to help the public learn about City incentives and processes for housing development/ARU's/annexations.

Existing Policies to Address Ashland's Housing Needs

This section lists existing measures that Ashland's has implemented to support housing development.

The City of Ashland has the following housing measures (or policies or strategies) currently in place to address Ashland housing needs:

Zoning

Action/Strategy	Description
Allow Middle Housing types (Duplexes, Cottage housing, Townhomes, Row Houses, and Tri- and Quad-Plexes) in low density zones	Ashland allows Duplexes and Accessory Residential Units wherever a single-family dwelling unit is permitted per the requirements of HB2001. Code amendments were enacted in June 2021. Ashland adopted cottage housing ordinance in November 2017 which allows cottage housing developments within single family zones. Following adoption Ashland has approved a number of cottage housing developments.
Allow Middle Housing types in medium density zones	Ashland's cottage housing ordinance allows cottage housing developments in the R-1-5 and R-1-7.5 zones on lots that are greater than 1.5 times the minimum lot size for the zone. Cottage Housing developments can be between 3 to 12 units depending on lot size. Tri- and Quad-Plexes Townhomes, Row Houses, Stacked Townhouses are permissible in Ashland's Medium Density zone (R-2), and Townhomes are further permitted in the R-1-3.5 zone or other residential zones (R-1-5, R-1-7.5, R-1-10) through planned unit developments.
Allow Stacked Townhouses, Garden Apartments, and larger-scale Apartments in high density zones	Stacked townhomes, condominiums, garden apartments and larger-scale apartments are permitted in R-2 and R-3 zones. However due to small lot sizes of vacant/partially vacant properties available in these zones, larger scale apartments are not often achievable given existing lot sizes, height limitations, and density allowances.
Allow Live-Work housing or Mixed-use housing in commercial zones	Live-work housing and mixed-development would be a permitted use within commercial zones although not specifically listed in the allowable use table for either commercial or residential zones. Home Occupations are special permitted in all zoning designations except for industrial (M-1). Current Action(s): A private developer is presently working on a legislative proposal to amend the Croman Mill Masterplan which would include live-work housing and mixed-use development. The amended masterplan, as presently being developed, is intended to focus on providing more flexibility in providing both residential and commercial uses than does the existing zoning.
Allow small or "tiny" homes	Small, or tiny, units that are built on a foundation are permitted in Ashland and have been developed as Accessory Residential Units. Tiny homes on wheels would have to be in an RV park, and there are thus limited opportunities for their placement in Ashland.
Allow Small Residential Lots	Planned Unit Developments in all SFR and MFR zones will allow for small lots (up to zero lot line and no minimum lot size) at allowable Densities for the zone. Additionally, cottage housing developments in SFR zones (R-1-5 & R-1-7.5) allow lots smaller than the minimum lot size for the zone in conjunction with common open space. Ashland's R-1-3.5 zone has a minimum lot size of 3,500 SF.

	Current Action: Middle Housing legislation (State) will allow expedited land divisions of middle housing (Duplexes) to enable independent lots smaller than the minimum lot sizes within the zone (July 2022)
Mandate Maximum Lot Sizes	Ashland does not have a maximum lot size or minimum density requirement in Single Family Residential zones, although market development typically maximizes the number of units provided. In cases where lot sizes are proposed that exceed the minimum lot size it is often in response to physical or environmental constraints that limit the buildable portion of a site (e.g. steep slopes, floodplains, wetlands and riparian areas)
Mandate Minimum Residential Densities	Minimum Density requirements (80% base density) are in place in multifamily residential zones (R-2 and R-3) on lots large enough to accommodate 3 or more units. Minimum densities and are required of any residential annexation equal to 90% Base Density exclusive of environmentally constrained lands.
Increase Allowable Residential Densities	Ashland recently removed the maximum residential densities within the Transit Triangle Overlay area (Ashland Street, portions of Siskiyou Blvd, and Tolman Creek Road). A form-based approach is used where limitations on height, lot coverage, and setback requirements create the 3D envelope in which units can be developed. This allows for many smaller units within the same space when compared to a base density approach which can produce fewer, large apartments or condominiums. Current Action: Draft Ordinance removing maximum residential densities in E-1, C-1 and C-1-D zones for mixed-use development has been reviewed and recommended for approval by the Planning Commission. The City Council is expected to review revisions to the draft ordinance this year.
Allow Clustered Residential Development	Ashland permits Planned Unit Developments in SFR and MFR zones which allows clustering of units and transfer of density from naturally constrained areas to the developable portion of the site.
Re-designate or rezone land for housing	Rezoning land in Ashland is not a common practice. The City has implemented a number of master planning efforts (Normal Neighborhood, North Mountain Plan, Croman Mill District) which have identified lands to be developed as multifamily or mixed-use development. Individual property owners have requested and received rezoning of their properties to multifamily zones for specific development proposals. However, there has not been an effort to examine vacant low density and employment properties within the City Limits as candidates for a comprehensive plan and zone change to increase the supply of multifamily zoned properties. Current Action(s): A Draft Ordinance which would allow an increased allowance for ground floor residential in employment zoned lands (E-1, C-1) for mixed-use development has been reviewed and recommended for approval by the Planning Commission. The City Council is expected to review the draft ordinance this year. A private developer is presently working on a legislative proposal to amend the Croman Mill Masterplan which would include rezoning the district to allow for a variety of housing types on lands currently zoned for commercial, employment, and industrial uses.
Transit Triangle Overlay (Ordinances 3166, 3167,3168) (adopted: December 2020)	Implements recommendations of an infill strategy to promote more housing within an area surrounding the bus route in the southeastern part of Ashland that circulates on Ashland St., Tolman Creek Rd., and Siskiyou Blvd. The approved Ordinance creates a Zoning Overlay, known as the Transit Triangle, that allows for a reduced amount of required commercial or employment uses from 65% to 35% of the ground floor in mixed-use buildings, a reduced parking requirement for small units, elimination of housing density maximums, and a requirement to provide rental housing in exchange for utilizing the optional Transit Triangle Overlay provisions.

Middle Housing Ordinance amendments (Ordinance 3199) (adopted 6/2021)	Ordinance Amendments to the duplex and accessory residential unit (ARU) standards to meet the requirements of new state laws and administrative rules included in House Bill (HB) 2001 from the 80 th Oregon Legislative Assembly, 2019 Regular Legislative Session. The primary changes to the land use code for duplexes are that duplexes are permitted in all residential zones including the single-family zones, are required to have two on-site parking spaces, and the approval process requires a building permit prior to construction or conversion of an existing structure. The primary changes to the land use code for ARUs are that ARUs do not require on-site parking spaces and the approval process requires a building permit prior to construction or conversion of an existing structure
Cottage Housing Standards (Ordinance 3147) (adopted 11/2017)	The Cottage Housing Ordinance adopted allows cottage housing in single family residential zones (R-1-5, R-1-7.5, and NN-1-5) and established the following provisions: ▪ A minimum of 3, and a maximum of 12, cottages can be provided in a cottage housing development depending on lot size. ▪ Cottages shall be no larger than 1000sq.ft., and at least 75% of the cottages shall be less than 800sq.ft. The parking requirements for cottage housing units was reduced to be as follows: Units less than 800 sq. ft. - 1 space/unit; Units greater than 800 square feet and less than 1000 square feet -1.5 spaces/unit.

Reduce Regulatory Impediments

Action/Strategy	Description
Reduced Parking Requirements	Ashland provides parking reductions for small units city-wide (one space per unit for units 500 SF or less). Within the Transit Triangle Overlay parking requirements are reduced to one space per unit for units 800 SF or less. Cottages of 800 SF or less within approved cottage housing developments require one space per unit. Many parking credits may be allocated to projects including: ▪ Off-street parking credit (1 for 1) for each on-street space along the property's frontage; ▪ joint use and mixed-use development credits (sharing the same space between a commercial use and residential use when demonstrated their time of use is not in conflict); ▪ off-site shared parking; ▪ transit facilities credit; ▪ Transportation Demand Management plan implementation.
Reduce Street Width Standards	Ashland has long implemented a "Narrow Street" standard through the Street Standards and Transportation System Plan. The narrow street and interconnected grid pattern promoted by Ashland's Street Standards both reduces development costs associated with new streets in subdivisions and retains developable land are for new housing.
Encourage multifamily residential development in commercial zones	Mixed use projects are permitted and encouraged in Ashland Commercial, and Employment zoned. Current Action(s): There is currently a draft ordinance under consideration that would increase the percentage of the ground floor that could be used as residential, as well as elimination of residential density caps in such mixed -use projects. Ordinance

	review expected in May 2022 in consideration of an economic study being undertaken by ECONorthwest for the Ashland Chamber of Commerce.
Remove barriers to Development of Accessory Dwelling Units (ADUs) in single-family zones	Ashland allows Accessory Residential Units (ARU or ADU) as an accessory use to single-family homes throughout the City with only Building Permit approval. Ashland further provides reduced SDCs for small units of less than 500 SF. No additional parking is required for ARUs in Ashland, and there has never been any owner-occupied requirement for the development of an ARU within the City.
Affordable Housing Standards (Ordinance 3195) (adopted 2020)	Provides a clear and predicable methodology for calculating maximum rent and purchase prices for covered affordable housing units; incentivizing affordable housing production through removing barriers to coordination between non-profit and for-profit housing developers; achieving a mixture of unit types commensurate with community housing needs; and improving administrative efficiency and effectiveness of the affordable housing program.

Financial Incentives

Action/Strategy	Description
Reduced / Waived Building Permit fee, Planning fees, or SDCs	Programs that reduce various development fees as an incentive to induce qualifying types of development or building features. Ashland waives or defers 100% of System Development Charges including Parks, Transportation, Water, Sewer and Storm Water SDCs for qualified affordable housing units targeted to households earning 80% AMI or less and meeting the rent or sale requirements of the Ashland Housing Program. Ashland waives Community Development Fees, and Engineering Services fees for voluntarily provided affordable housing units that remain affordable for 60 years. Affordable ownership units that leave the program after 30 years, but less than 60 years, must repay a prorated amount of SDCs, Community Development Fees, and Engineering Services Fees that were deferred.
Scaling SDCs to Unit Size	Cities often charge a set SDC per dwelling unit, charging the same SDCs for large single-family detached units as for small single-family detached units or accessory dwelling units. Ashland's SDC methodology charges 50% of the calculated per unit SDC amount for units less than 500sq.ft., and 75% of the calculated per unit SDC amount for units between 500 and 800sq.ft. Thus, smaller units pay proportionately less SDCs for Transportation, Parks, and Sewer and Water compared to full size units due to their potential for smaller household sizes and commensurate impacts. Storm Water SDCs are based on lot coverage and thus, smaller units have lower Storm Water
Provide Density Bonuses to Developers	Ashland has four density bonuses, one of which is for development of affordable housing at higher densities and another for energy-efficient housing. - Affordable housing projects meeting eligibility requirements (including rental or ownership housing affordable to households at 80% or less of AMI for a min. of 30 years) receive a density bonus of two units for each affordable unit provided, up to a max. of a 35% increase in density. - The max. density bonus inclusive of other bonuses (open space, conservation) can be 60% over the base density within the zone. - Ashland's Cottage Housing Development ordinance effectively provides a doubling of the allowable density in the zone for provision of the small cottage housing units.

	Ashland classifies small units, of 500 SF or less, as only 75% of a unit for the purposes of density calculations. A greater number of small units can be developed within existing density allowances without employing a density bonus.
SDC Deferral Resolution (Resolution 2020-24) (adopted 2020)	Establishes the terms of affordability and recapture provisions for deferred fees and charges for qualified affordable ownership units and affordable rental units that remain in the affordable housing program for at least 30 years.
Vertical Housing Tax Credit (adopted 12/2020)	A Vertical Housing Development Zone has been established for designated Commercially zoned properties within the Transit Triangle to promote the development of mixed-use projects that incorporate multiple floors of housing.
SDC Financing Credits	Ashland amended the SDC collection of charge provisions in 2019 within the Ashland Municipal Code (4.20.090). These amendments allow SDCs to be paid over a 10-year period in semi-annual installments. A one-year installment loan shall not be subject to an annual interest rate provided all charges are paid prior to the City's issuance of the Certificate of Occupancy, time of sale, or withing one year of when the charge was imposed, whichever comes first. For installments that exceed one year, repayment interest on the unpaid balance at annual rate of six percent (6%) is assessed for a five-year installment loan or seven percent (7%) for a 10-year installment loan.

Financial resources

Action/Strategy	Description
CDBG	Ashland is a direct Community Development Block Grant (CDBG) entitlement community and receives HUD allocations of approx. \$175,000/year. The 5-year Consolidated Plan for use of CDBG funds prioritizes capital restricted CDBG funds toward affordable housing and shelter and 15% of the award is typically provided to service providers benefiting extremely low-income individuals.
General Fund Grants or Loans	Ashland's Affordable Housing Trust Fund is part of the General Fund and is used to support the development of affordable housing. The City has not issued a bond to generate revenue for affordable housing
Transient Lodging Tax (TLT)	Ashland collects Transient Occupancy Taxes (TOT), and applies them toward tourism related activities, economic development grants, and social service grants annually in accordance to the restricted/unrestricted use parameters.
Fees or Other Dedicated Revenue	Ashland has an Affordable Housing Trust Fund, and the City Council has dedicated Marijuana Tax revenue (up to \$100,000 annually) to support the AHTF through the annual budgeting process.
Local Improvement District (LID)	Ashland has utilized LIDs for specific public improvement projects within the City, which has enabled a group of property owners to share the cost of a project or infrastructural improvement on a pro-rata basis, where the City contributes the majority of the costs of public improvements.
Reimbursement District	Ashland's municipal code (13.30.0150) was amended in 2010 to enable a developer to request the City establish a Reimbursement District to collect public improvement costs that exceed those attributable to service the property owned by the applicant.

Examples of excess costs include (but are not limited to): Full-street improvements instead of half street improvements; Off-site sidewalks; Connection of street sections for continuity; Extension of water lines; and Extension of sewer lines
To date, no Reimbursement District has been requested or formed.

Tax Exemption and Abatement

Action/Strategy	Description
Vertical Housing Tax Abatement (Locally Enabled and Managed)	On December 15, 2020, Ashland passed a Vertical Housing Tax Credit and designated Commercially zoned properties within the Transit Triangle overlay area as an eligible Vertical Housing Development Zone.

Land, Acquisition, Lease, and Partnerships

Action/Strategy	Description
Land Trusts	A land trust is typically a nonprofit organization that owns land and sells or leases the housing on the land to income-qualified buyers. There are 49 units within Ashland that are operated under the land Trust model. The Ashland Community Land Trust operated in Ashland from 2000 until 2015 when the non-profit organization formally dissolved. And transferred their 18 affordable land trusted housing units to ACCESS Inc. Rogue Valley Community Development Corporation developed 31 units under the land trust model which were transferred to NeighborWorks Umpqua for administration.
Public Land Disposition	Ashland has dedicated surplus City property for the development of affordable housing or sold surplus City property and directed the proceeds into the Ashland Housing Trust Fund to support affordable housing development. Current Action: The City of Ashland is presently evaluating the disposition of surplus property, as well offering the air rights above a city owned parking lot to develop needed housing. Affordable and workforce housing providers will be extended the opportunity to respond to any Request for Proposals or purchase/sale solicitation efforts.
Parcel Assembly	Parcel assembly involves the city's ability to purchase lands for the purpose of land aggregation or site assembly The City has experience acquiring property for the future development of affordable housing, having acquired 10 acres on Clay Street in cooperation with the Housing Authority of Jackson County. Over the last decade this property provided a location for 120 units of affordable housing. The City typically relies on affordable housing partners to identify property for a proposed development and has provided financial assistance (CDBG or Affordable Housing Trust Fund (AHTF) to assist in acquisition. Most recently the City helped purchase a parcel using AHTF for Columbia Care to develop a 30-unit affordable housing project

Requirements

Action/Strategy	Description
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Preserving Existing Housing Supply	Ashland has an ordinance that regulates conversion of apartments into condominiums, providing for preservation of multi-family rentals and providing for longer notice periods prior to tenant displacement and relocation assistance can be required. Ashland's demolition ordinance does regulate demolitions of housing, requiring replacement dwellings be provide as part of the demolition proposal. Further, the demolition of a house (over 45 years old) must demonstrate it is not financially viable to retain the structure versus replacement, thus promoting renovation as opposed to removal.
Inclusionary Zoning	Ashland requires a percentage of affordable housing (25% of the base density exclusive of unbuildable areas) as part of residential annexations, as well as for zone changes that increase residential density by 4 units or more: https://ashland.municipal.codes/LandUse/18.5.8.050.G Ashland has not implemented an inclusionary zoning ordinance for residential developments within the City Limits for proposed structures containing 20 units or more under the State's 2020 inclusionary zoning legislation.
Condominium Conversion Ordinance	An Ordinance establishing that conversion of existing rental units into for-purchase units (Condominium Conversions) requires that half of the units in an existing apartment complex are to be retained as rentals upon conversion in the event any relief from current land use requirements is requested. In the event the applicant chooses to convert all the apartments in a complex into for purchase housing, the ordinance establishes a requirement that 25% of the total number of units be designated as affordable ownership housing.

Other

Action/Strategy	Description
Comprehensive Plan Housing Element (adopted 2019)	In 2019 the City of Ashland rewrote the entirety of the Housing Element of the Comprehensive Plan. The Housing Element sets forth general goals and policies which provide guidance for Ashland's growth and development over time. The adopted Housing Element includes Goals and Policies under four main categories: ▪ Diversity of Housing Types ▪ Production and Preservation of Affordable Housing ▪ Environmental Stewardship and Sustainability ▪ Data, Inventories, Projections and Permitting
Tenant Rights (Ordinance 2939)	An Ordinance establishing Chapter 10.115 of the AMC which provides for Tenant Rights and relocation benefits for residents facing displacement due to condominium conversions.

Existing and Expected Barriers to Development of Needed Housing

The barriers to development of needed housing in Ashland include:

- **Having enough development-ready land for the next 5 years.** While the Ashland HCA shows that there is enough land within the UGB to meet housing needs over the next 20 years, land in the UGB is not necessarily development ready. Land requires the full suite of backbone services (water, wastewater, transportation) before it is development ready. The cost of building out infrastructure is increasing. Additionally, the annexation process in Ashland can be a lengthy and uncertain process, which adds cost and risk to development. Inclusionary zoning requirements for residential annexations add further cost to greenfield development. These factors affect the short-term availability of land to meet immediate housing needs.
- **Zoning limitations for higher density housing.** Density, height and lot coverage limitations in R-2 and R-3 zones are barriers to higher density residential development. Stacked townhomes, condominiums, garden apartments and larger-scale apartments are permitted in R-2 and R-3 zones. However, due to small lot sizes of vacant/partially vacant properties available in these zones, larger scale apartments are not often achievable given existing lot sizes, height limitations, and density allowances. Additionally, the Ashland HCA shows there are only 11.7 acres of net buildable land in the City's R-3. These factors limit the number of units that can be built in the City's higher density residential zones
- **Land for development of regulated affordable housing.** Land for development of regulated, income-restricted affordable housing is scarce. Building income-restricted housing (i.e., housing that is affordable at 60% or less of MFI) requires land that is affordable, allows multi-unit development, and in an appropriate location. The locations best suited for development of affordable income-restricted housing are areas with access to transit, near services (both social services and other services), and near jobs (or with easy access to jobs). Land in these locations is often higher-cost and may not currently be zoned to allow multi-unit housing.
- **Funding and resources to support development of income-restricted affordable housing.** Developing income-restricted housing for households with incomes below 60% of MFI generally requires federal, state, and local subsidy so that it can cover the costs of development and operations with restricted rents. One of the key barriers to development of income-restricted affordable housing is identifying sufficient funding to support its development. A city's options for funding affordable housing development include direct funding (i.e., monetary contributions for housing), contributions of land, and cost reductions (e.g., tax abatements or waiving fees).
- **Funding and resources to support development of housing affordable to middle-income households.** Developing new housing affordable to households with incomes of 60% to 120% of MFI is often not financially feasible without subsidy. Federal and state funding is harder to access for building housing affordable in this income group. As a result, supporting development of housing affordable to middle-income households requires city intervention, such as removing zoning barriers to development of this type of housing and ensuring that infrastructure is available to support housing

development, both of which are discussed above. In addition, cities can support development of this type of housing through direct funding (i.e., monetary contributions for housing), contributions of land, and cost reductions (e.g., tax abatements or waiving fees).

- **Capacity of the development community to support development of needed housing.** Capacity for development of housing includes developers willing and able to develop needed housing, nonprofits with the capacity to support development of affordable housing, and availability of skilled construction labor to do the housing development (or renovations). Each of these are potential barriers and can have different impacts on development of affordable housing. Capacity in the development community can include knowledge of navigating affordable housing financing and reporting requirements, knowledge of development of new or innovative housing projects, and capacity to take on new housing development. Capacity for nonprofits can be a combination of staff capacity for executing on projects and funding to support affordable housing projects.
- **Lack of existing nonprofit capacity to support affordable housing development.** There are no nonprofit organizations currently available to partner with Ashland on housing development, such as nonprofit organizations running local land banks or land trusts. Partnering with local nonprofits that can support the City's broader goals around affordability could help improve access to a variety of housing types affordable at lower and middle incomes. A lack of nonprofit capacity to develop housing, as well as running programs that support the City's broader housing goals, can be a substantial barrier to developing affordable housing.

3. Actions to Meet Future Housing Need

Summary of the Actions and How They Work Together

Most of the actions and funding tools discussed in this section can be used to meet housing needs at different income levels. This section describes how groupings of strategies, into initiatives, are necessary to work together to meet Ashland's housing needs.

The City developed four initiatives that address key housing needs in the city. The initiatives comprise a set of potential city-led strategies, funding sources, and potential partnerships with other entities that help to achieve an overarching goal. By bundling strategies and funding sources, the City acknowledges that several strategies and partnerships are necessary to achieve the City's housing goals.

Many of the actions and funding tools discussed in this project can be used to meet housing needs at different income levels. This section describes how groupings of actions, into initiatives, are work together to meet Ashland housing needs.

The initiatives are:

- **Encourage development of low- and moderate-income affordable rental housing.** This initiative seeks to increase the housing options for unregulated rental households earning between 60% and 120% of MFI (\$43,900 to \$87,700).
 - Identify additional funds to support the Affordable Housing Trust Fund
 - Evaluate participating in or establishing a land bank.
 - Evaluate opportunities to participate in a land trust.
 - Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing
- **Increase opportunities for affordable homeownership.** This initiative seeks to increase the housing options for homeownership for households earning less 120% of MFI (less than \$87,700).
 - Identify additional funds to support the Affordable Housing Trust Fund
 - Maintain quality and support preservation of existing manufactured home parks
 - Evaluate participating in or establishing a land bank.
 - Evaluate opportunities to participate in a land trust.
 - Establish a Construction Excise Tax
- **Encourage development of income-restricted affordable housing units.** There are limited options available in Ashland that are affordable to households with income of

less than 60% of MFI (\$43,900). This initiative supports development of housing affordable in this income group.

- Work with partners to support development of additional permanent supportive housing
- Establish a Construction Excise Tax
- Evaluate using Urban Renewal
- Evaluate participating in or establishing a land bank.
- Evaluate opportunities to participate in a land trust.
- **Preserve existing of low- and moderate-income affordable housing.** This initiative seeks to increase the housing options for households earning less than 120% of MFI (less than \$87,700).
 - Maintain quality and support preservation of existing manufactured home parks
 - Preserve and improve existing low-cost, unregulated, rental housing
 - Identify additional funds to support the Affordable Housing Trust Fund

Exhibit 12. Housing Initiatives and the Potential Actions

■ Primary Focus of the initiative □ Secondary Focus of the initiative

Action Name	Initiative Name			
	Encourage development of low- and moderate-income affordable rental housing	Increase opportunities for affordable homeownership	Encourage development of income-restricted affordable housing units	Preserve existing supply of low- and moderate-income affordable housing
Actions				
A. Evaluate participating in or establishing a land bank.	■	■	■	
B. Evaluate opportunities to participate in a land trust.	■	■		
C. Host educational events with the Housing and Human Services Advisory Committee or other organizations	□	■	■	■
D. Develop an equitable housing plan	□	■	■	■
E. Disallow SFD in High Density R-3 Zone	■		□	□
F. Evaluate increasing allowances for residential dwellings in commercial and employment zones	■			
G. Maintain quality and support preservation of existing manufactured home parks	□	■		■
H. Increase development capacity of MFR dwellings through changes to the Land Use Ordinance	■		■	
I. Implement the Multiple Unit Property Tax Exemption (MUPTEx) to support multifamily or affordable housing	■			□
J. Preserve and improve existing low-cost, unregulated, rental housing				■
K. Work with partners to support development of additional permanent supportive housing			■	
L. Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development	■	■	□	

Action Name	Initiative Name			
	Encourage development of low- and moderate-income affordable rental housing	Increase opportunities for affordable homeownership	Encourage development of income-restricted affordable housing units	Preserve existing supply of low- and moderate-income affordable housing
Funding Sources				
M. Establish a Construction Excise Tax	☒	☒	☒	☒
N. Evaluate using Urban Renewal	☐	☐	☒	☒
O. Identify additional funds to support the Affordable Housing Trust Fund	☒	☒	☒	☒

Funding the Actions

One of the key limitations to implementing the actions in the HPS is the availability of funding. Funding is needed not only to build units, preserve affordable housing, and provide access to equitable housing, but also for staff time to implement the Plan. Identifying a set of realistic funding sources is necessary for achieving the vision of affordable housing in Ashland.

A robust set of housing preservation and development programs requires funding sources that are dedicated toward these activities and that are stable and flexible. In addition to existing available funding options, the City will need to pursue new funding sources that can help fund its programs.

- **Urban Renewal District.** Freezes property tax accumulation in a designated Urban Renewal District until the Urban Renewal District expires or pays off bonds. The City could use Urban Renewal to support development of infrastructure necessary to support housing development.
- **Construction Excise Tax (CET) Revenues.** The allowed uses for CET funding, as defined by state statute, include: at least 50 percent must be used for developer incentives, up to four percent may be used to cover administrative costs, 15 percent goes to the Oregon Housing and Community Services for homeowner programs and up to 35 percent may be used flexibly for affordable housing programs, as defined by the jurisdiction. As part of establishing a CET in Ashland, the City will need to develop a plan for use of CET funds to support affordable housing development.
- **Affordable Housing Trust Fund (AHTF).** The AHTF provides direct financial resources to the development of affordable housing for low-income households. The HPS describes several potential avenues the City could pursue to identify additional funding sources for the AHTF, including a general obligation bond, construction excise tax, transfer of development density fees, transient occupancy tax, continuing the use of Marijuana tax funds, or providing one time contributions to the fund through bequests or the sale of surplus city property.

Other Funding Sources Considered

The City has a variety of other options for locally controlled funding sources that could support affordable housing. While this project did not include a robust funding analysis component, the project team discussed these funding sources with the Task Force.

Exhibit 13. provides an overview of which funding sources advanced to the HPS.

Exhibit 13. Funding Sources Evaluated

Recommendation for Inclusion in the HPS as an Action?	Revenue Source	Rationale for Inclusion/Exclusion?
Yes	New Urban Renewal Area, if established	Could provide a stable, dedicated revenue source in an area with limited existing infrastructure.
Yes	Use of CET funding, if established	Provides a funding source to support developer incentives, affordable homeownership and affordable housing programs.
No but staff will continue to pursue	Grants and State Funding	Not included as an action but considered as a source of funding for other housing strategies.
No but the City will accept these	Private donations and gifts	Pursue as the City has staff capacity, without dedicated staff this is not likely to be a substantial source of funding
Consider as a source of funding for the AHTF	General Obligation Bond	Requires voter approval and may be difficult to pass
No	New local option levy	Requires voter approval, unlikely to pass
No	Increased lodging tax	Only 30% increased revenue could go to housing; 70% dedicated to tourism promotion
No	Marijuana tax	A portion of the proceeds from the City's portion of the State Marijuana Tax is already a long-term revenue source to fund the AHTF.
No	Increase Systems Development Charges	Does not provide a source of funding for development or preservation of housing.
No	Increased utility fee	Does not provide a source of funding for development or preservation of housing.
No	Increased building and planning permit fees	Does not provide a source of funding for development or preservation of housing.
No	New business license fee	May hinder local business development
No	New food and beverage tax	The city passed this, but revenue was not allocated for housing.
No	New sales tax	May not be politically feasible
No	New payroll/business income tax	May not be politically feasible
No	New ticket tax	May not be politically feasible
No	New real estate transfer tax	Not legal in Oregon
No	New vacant/second home tax	Untested and possibly not legal in Oregon

Actions

This section presents the proposed actions for inclusion in the HPS.

Summary of Actions

In developing the HPS, we evaluated each of the actions considered for inclusion in the HPS based on the following. Appendix B provides more details about these evaluation criteria, beyond the summary below.

- **Income level served**, focusing on incomes below 120% of MFI is a way to best support housing affordable to households who are most likely to have difficulty affording housing.
- **Impact for housing development**, considers the potential scale of impact of the action, which provides some context for whether the policy tool generally results in a little or a lot of change in the housing market.
- **Administrative complexity**, considers how much staff time and resources (financial or otherwise) are required to implement the action and whether the action is difficult or costly to administer once it is in place.
- **Feasibility**, assesses the political and community acceptability of the action for stakeholders, as well as potential need to coordinate with other organizations.
- **Flexibility**, describes whether the action can be flexibly used to achieve multiple outcomes

Exhibit 14. Summary of Actions

Action Name	Level of Affordability Addressed			Impact for Development	Admin Complexity	Feasibility	Flexibility
	<50% MFI	50%-80% MFI	80%-120% MFI				
Actions							
A. Evaluate participating in or establishing a land bank.	X	X		Small to Moderate	High	Moderate	More
B. Evaluate opportunities to participate in a land trust.	X	X		Small to Moderate	High	Moderate to Less Depends on having a nonprofit partner	More

Action Name	Level of Affordability Addressed			Impact for Development	Admin Complexity	Feasibility	Flexibility
	<50% MFI	50%-80% MFI	80%-120% MFI				
C. Host educational events with the Housing and Human Services Advisory Committee or other organizations	X	X	X	Small	Low	More	More
D. Develop an equitable housing plan	X	X	X	Small	Low	More	Moderate
E. Disallow SFD in High Density R-3 Zone	X	X	X	Small to Moderate	Low	Moderate	Moderate
F. Evaluate increasing allowances for residential dwellings in commercial and employment zones	X	X	X	Small to Moderate	Low	Moderate	Moderate
G. Maintain quality and support preservation of existing manufactured home parks	X	X		Small to Moderate	Low	Moderate to Less Depends on funding	Less
H. Increase development capacity of MFR dwellings through changes to the Land Use Ordinance	X	X	X	Small	Low	More	Moderate
I. Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing		X		Moderate	Medium	Moderate	Moderate
J. Preserve and improve existing low-cost, unregulated, rental housing	X	X		Small to Moderate	Medium	Moderate to Less Depends on funding	More
K. Work with partners to support development of additional permanent supportive housing	X			Small to Moderate	Medium	Moderate to Less Depends on funding	Less
L. Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development	X	X	X	Small	Medium	Moderate	Less
Funding Sources							
M. Establish a Construction Excise Tax	X	X		Moderate to large	Medium	Less to Moderate	More
N. Evaluate using Urban Renewal or other financing tools	X	X	X	Moderate	High	Less to Moderate	More

Action Name	Level of Affordability Addressed			Impact for Development	Admin Complexity	Feasibility	Flexibility
	<50% MFI	50%-80% MFI	80%-120% MFI				
O. Identify additional funds to support the Affordable Housing Trust Fund	X	X		Moderate to large	High	Less	More

Potential Partners

Implementing the actions in this strategy will require participation of key partners who have roles essential to the construction, delivery, and preservation of housing units. Exhibit 15 shows how each of the partners would play a role in different actions.

Exhibit 15. City and Partner Roles

Actions	City	Other Government Agencies	Affordable and Market Rate Developers	Local Nonprofits	Other
A. Evaluate participating in or establishing a land bank.	Contribute land or funding		Develop housing		
B. Evaluate opportunities to participate in a land trust.	Contribute land or funding		Develop housing	Manage Land Trust	
C. Host educational events with the Housing and Human Services Advisory Committee or other organizations	Partner to identify needs, develop materials, do outreach and plan/host events			Partner to identify needs, develop materials, do outreach and plan events	Coordinate with HHSAC
D. Develop an equitable housing plan	Develop plan, adoption, implementation,	Provide input	Provide input	Provide input	Coordinate with HHSAC
E. Disallow SFD in High Density R-3 Zone	Revise development code				
F. Evaluate increasing allowances for residential dwellings in commercial and employment zones	Revise development code				

G. Maintain quality and support preservation of existing manufactured home parks	Revise development code; outreach to property owners and nonprofits	OHCS: partnership on preservation efforts		Partnership on preservation efforts	Owners of manufactured home parks: provide input
H. Increase development capacity of MFR dwellings through changes to the Land Use Ordinance	Revise development code		Provide input		
I. Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing	Outreach, develop eligibility criteria, adoption, implementation, promotion	Taxing Districts: consider exemption approval	Provide input		
J. Preserve and improve existing low-cost, unregulated, rental housing	Develop program; funding; outreach & promotion	Ashland Housing Authority: provide input & materials; outreach		Partnership; provide input & materials; outreach	Property owners
K. Work with partners to support development of additional permanent supportive housing	Provide funding and development assistance opportunities	Jackson County: partnership to develop regional approach.		Service providers: identify and utilize funding and development assistance opportunities.	
L. Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development	Evaluate opportunities; determine implementation steps and identify partners	Ashland Conservation Division, Electric Department, Building Division: provide input	Provide input		Ashland Climate Policy Commission: provide input
Funding Sources					
M. Establish a Construction Excise Tax	Develop and implement plans		Provide input		Major employers, and the business community: provide input
N. Evaluate using Urban Renewal or other financing tools	Establish and partner w/Urban Renewal Agency	URA: Select projects; implement the Plan			Property owners
O. Identify additional funds to support the Affordable Housing Trust Fund	Evaluate new sources of funding,				Residents: provide input

	develop, and implement plan				
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Implementation Schedule for Actions

The table below presents a schedule for implementation of the Housing Production Strategy. The table shows each of the 10 policies with the actions below. Each action will go through a period of development where staff works with decision makers to develop the specifics of the action, then potential adoption and implementation. The activities for each of these are described below.

- **Further refinement:** The actions will require some level of further refinement prior to adoption, which may range from simple logistics (such as developing materials about an existing program) to complicated coordination between multiple internal and external stakeholders (such as implementation of a tax abatement). The refinement period will occur before adoption.
- **Adoption or City Council direction:** This occurs when the City takes official action to adopt an action (or uses another official acknowledgement that the City is going to execute on the strategic action) or gives staff official direction on implementation of an action. The table shows the expected time of adoption in the time period the table. The City's deadline for adoption (or for other official city action) is the last day of the year shown in Exhibit 16.
- **Implementation:** This occurs when the City officially allows the strategic action to be used, represented by a tan color in the table.

Exhibit 16. Implementation Schedule¹⁶

Actions	July 1 2023 through December 2023	2024	2025	2026	2027	2028	2029	2030	2031
A. Evaluate participating in or establishing a land bank.			Evaluate opportunities	Get policy direction from City Council	Implement				
B. Evaluate opportunities to participate in a land trust.		Evaluate opportunities	Get policy direction from City Council	Implement as opportunity arises					

¹⁶ The City of Ashland expects to comply with the Climate Friendly and Equitable Communities (CFEC) Rules. Implementation of CFEC requirements is likely to affect the timeline for some of the strategies in the HPS including Actions E, G, K, and M.

Actions	July 1 2023 through December 2023	2024	2025	2026	2027	2028	2029	2030	2031
C. Host educational events with the Housing and Human Services Advisory Committee or other organizations		On-Going							
D. Develop an equitable housing plan	Develop Plan	Adopt	Implement						
E. Disallow SFD in High Density R-3 Zone				Develop Ordinance	Adopt	Implement			
F. Evaluate increasing allowances for residential dwellings in commercial and employment zones			Adopt	Implement					
G. Maintain quality and support preservation of existing manufactured home parks	Begin Refining	Adopt	Implement						
H. Increase development capacity of MFR dwellings through changes to the Land Use Ordinance				Develop Ordinance	Adopt	Implement			
I. Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing					Begin Implementation Steps	Adopt	Implement		
J. Preserve and improve existing low-cost, unregulated, rental housing			Evaluate programs	Get policy direction from City Council	Implement				
K. Work with partners to support development of additional permanent supportive housing		On-Going							
L. Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development							Get policy direction from City Council	Implement	

Actions	July 1 2023 through December 2023	2024	2025	2026	2027	2028	2029	2030	2031
M. Establish a Construction Excise Tax		Evaluate approach	Adopt	Implement					
N. Evaluate using Urban Renewal or other financing tools				Evaluate approach	Develop Plans	Adopt	Implement		
O. Identify additional funds to support the Affordable Housing Trust Fund		Evaluate new sources	Get policy direction from City Council	On-Going					

The following actions are under consideration for inclusion in the HPS. This section presents some information about each action. If selected for inclusion in the HPS additional information will be included for each action. In Action A, we show all of the information that will be included in the HPS, with placeholders for information we will fill in later.

A. Evaluate participating in or establishing a land bank

Rationale

Land control is critical because costs make affordable housing development difficult or financially infeasible. Land banks support low- and moderate-income affordable housing development by reducing or eliminating land cost from development, increasing a nonprofits' capacity to build affordable housing.

Description

Through land banking, the City can provide a pipeline of land for future development and control the type of development that may occur on that land. The City could pursue land banking in five ways:

- Designate city-owned land as surplus and contribute that land to the land bank, eventually conveying that land to affordable housing developers for development of housing at agreed-on level of affordability, such as housing affordable below 60% of MFI.
- Purchase properties for the purpose of building affordable housing and convey that land to affordable housing developers for development of housing at agreed-on level of affordability.
- Accept land which is dedicated to the City to satisfy affordable housing requirements associated with annexations, zone changes, or other inclusionary housing standards.
- Accept properties which are either donated to the City for the express purpose of providing for the development of affordable housing.
- Provide funds to support land banking done by another organization, with the purpose of building affordable housing in the future.

Land banking could be used as a strategy to increase housing for renters or homeownership. If used for rental housing, land banking would likely be used for income-restricted affordable housing. If used as a strategy to increase homeownership opportunities, then land banking would be used in conjunction with a community land trust.

City Role

The City could have multiple roles for land banking, including:

- Partner-led project with a nonprofit developer or land trust in which City contributes funds or land to the project. City can contribute land to support the affordable housing development.
- City-led affordable housing development project with city-owned land banking. City can provide funds or land and help with parcel assembly.

The City may participate in multiple projects over time that involve different types of land banking strategy. The City's role may vary on different projects, such as contributing city-owned surplus land for development, assisting with land purchase and assembly, providing funding to support land purchase, or partnering in an affordable housing development project that includes land banking as well as other strategies.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. Nonprofit agencies, including faith-based organizations, other governmental agencies, and representatives from the private sector.

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Low- and middle-income households	Up to 80% of Median Family Income	Renter or Owner	Low to moderate

Potential Risks

If public land is used for affordable housing, it cannot be used for other city functions. However, the land would have been identified as surplus and not needed for city functions. Funds spent on affordable housing will be unavailable for other city services. If the City does not ensure that housing will be affordable at below 80% of MFI for the foreseeable future, the housing costs may increase, making the housing less affordable.

Implementation Steps

- Get policy direction from City Council on the role the City should take in land banking.
- Inventory publicly and privately-owned properties (including properties owned by faith-based organizations) in areas well-suited for a land bank purpose.
- Partner with and contribute funds or land to an existing non-profit land bank or participate in the formation of a new non-profit land bank if one does not exist with sufficient capacity to serve Ashland.
- Incorporate publicly owned land into a bank or acquire new land to incorporate to the land bank.
- Partner with and contribute land to a community land trust that is led by an existing entity, often a nonprofit organization.
- Acquire land or maintain existing land until it can be made available to developers through a Request for Proposals to develop as affordable housing.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
Get policy direction from Council - 2026	2027; on-going	On-going; as land is identified

Funding or Revenue Implications

Partnering is the most administratively efficient and cost-efficient approach to implementing this strategy. If the City is contributing land to the land bank at low- or no-cost, then the City is forgoing realizing the value of the land if it was sold on the open market. If the City contributes funds to a land bank or land trust, the City will need to identify a source of funding for the contributions.

B. Evaluate opportunities to participate in a land trust

Rationale

Land trusts support affordable housing development by reducing or eliminating land cost from development. Land trusts hold land in perpetuity and sell or lease the housing on the land at below-market rate prices. Land trusts most frequently provide opportunities for homeownership that remain affordable over the long-term.

There are currently 49 units within Ashland that are operated under the land trust model. Beginning in 2000 the Ashland Community Land Trust developed 18 land trusted affordable housing units, which are currently administered by ACCESS Inc. Ashland Community Land Trust has since dissolved. Rogue Valley Community Development Corporation developed 31 units under the land trust model which were transferred to NeighborWorks Umpqua for administration.

Description

The City may participate in a community land trust that is operated by an existing entity, often a nonprofit organization. The City's role in a community land trust could be as a partner, possibly assisting the trust with land acquisition through land banking (Action A) or through providing funding to support housing development.

A land trust is typically managed by a nonprofit organization that owns land and sells/leases the housing on the land to income-qualified buyers. Because the land is not included in the housing price for tenants/buyers, land trusts can achieve below-market pricing. Land trusts are most commonly used as a method for supporting affordable home ownership goals. The City's role would be one of supporting and partnering with the nonprofit that runs the land trust.

City Role

Partner with and contribute funds or land to an existing non-profit land trust or participate in the formation of a new non-profit land trust if one does not exist with sufficient capacity to serve Ashland.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. ACCESS Inc, Neighborworks UMPQUA, other nonprofits involved in the creation of affordable housing.

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Low- and middle-income households	Up to 80% of Median Family Income	Renter or Owner	Low to moderate

Potential Risks

If public land is used for affordable housing, it cannot be used for other city functions. However, the land would have been identified as surplus and not needed for city functions. Funds spent on affordable housing will be unavailable for other city services. If the City does not ensure that housing will be affordable at below 80% of MFI for the foreseeable future, the housing costs may increase, making the housing less affordable.

Implementation Steps

- Get policy direction on implementing this action from City Council.
- Identify a community land trust that is interested in operating in Ashland.
- Partner with and contribute land to a community land trust that is led by an existing entity, often a nonprofit organization.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
Get policy direction from Council - 2025	2026; on-going	On-going; as opportunity arises

Funding or Revenue Implications

Partnering is the most administratively efficient and cost-efficient approach to implementing this strategy. If the City is contributing land to the land trust at low- or no-cost, then the City is forgoing realizing the value of the land if it was sold on the open market. If the City contributes funds to a land trust, the City will need to identify a source of funding for the contributions.

C. Host educational events with the Housing and Human Services Advisory Committee or other organizations.

Rationale

Education around housing issues is important to preventing and addressing housing discrimination, ensuring rights are protected, and connecting residents with housing resources.

Description

The City can work with the Housing and Human Services Advisory Committee or other organizations to host educational events. Trainings could focus on topics such as fair housing and housing discrimination, foreclosure, eviction, tenant and landlord rights, trainings to serve vulnerable populations, or other information needs as they arise. Fair Housing education events could be held for residents, property owners, property managers, realtors, lenders and others involved with real estate transactions.

City Role

The City can work with the Housing and Human Services Advisory Committee or organizations to identify information needs and training ideas. Regular meetings or coordination with the City and partners could occur to discuss needs and opportunities. The City could also contract with trainers or area experts to provide trainings and host educational events.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. Housing and Human Services Advisory Committee, Fair Housing Council

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Low- and middle-income households; others involved with real estate	All levels of income, primarily households with incomes of less than 80% of Median Family Income (MFI).	Renter	None

Potential Risks

Impacts are likely to be minor or have no negative impact.

Implementation Steps

- Work with partners to identify education needs and target populations.
- Develop presentation materials
- Identify city-led presentation calendar for each year
- Work with partners to plan, advertise, and convene educational events.
- Participate in city-led presentations
- Work with partners to execute on outreach on topics that are not city-led, such as Fair Housing outreach.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
Begin in 2024	On-going	On-going

Funding or Revenue Implications

Staff time and available Planning Division tools and resources will be relied on to accomplish this strategy.

D. Develop an equitable housing plan

Rationale

The City's 2020-2024 *Fair Housing Analysis of Impediments to Fair Housing Choice Update for the City of Ashland* identified impediments to fair housing such as: limited community awareness about fair housing protections and resources, instances of discrimination in housing transactions, and a lack of affordable housing. An equitable housing plan could address the issues identified in this report by outlining initial steps, action plans with goals and methods to measure progress to achieve more equitable housing and continuously examine ways to make improvements to the housing system to achieve equity.

Description

An equitable housing plan could implement strategies from the *Fair Housing Analysis of Impediments Report*, including:

- Offering education and training to City Staff, Elected and Appointed Officials, and the community.
- Reviewing City policies for disparate impact and biased language.
- The adoption of a tool to ensure inclusivity in decision making process regarding City grant funding.

The action described in the third bullet above, adoption of a tool to ensure inclusivity in decision making, could be tied to a broader City effort to adopt a Social and Environmental Equity matrix.¹⁷ For housing, this matrix could help guide City decisions around grants, funding for housing, and other city policies focusing on developing and preserving housing. The City could also include questions in the matrix to help assess potential impacts from other City decisions around housing and displacement risk, and to promote Universal Design policies and address equity for people with disabilities.

¹⁷ The Housing and Human Services Advisory Committee has considered developing a social and environmental equity matrix, similar to Eugene's triple bottom line, to help evaluate grant funding decisions. Eugene's Triple Bottom line is a framework in that helps the City assess the environmental, equity and economic impacts, benefits and trade-offs of decisions.

City Role

Develop and adopt an equitable housing plan and implement projects.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. Housing and Human Services Advisory Committee, Fair Housing Council of Oregon, La Clinica – Learning Well, affordable housing providers, Social Equity and Racial Justice Commission, Rogue Valley Council of Governments Lifelong Housing Division

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Low-income people, seniors, people with disabilities, People of Color, other vulnerable or historically marginalized populations	All levels of income, primarily households with incomes of less than 80% of Median Family Income (MFI).	Renter and Owner	None

Potential Risks

If the adoption of a Social and Environmental Equity matrix requires an additional review for certain planning and development procedures, it could create a development barrier by adding review time. Additionally, depending on how the Social and Environmental Equity matrix is applied, it could potentially create additional costs. For example, if an affordable housing development received funding from the City, and the matrix requires developments receiving city funding to include accessibility improvements, it could add to development costs.

Implementation Steps

- Work with the Housing and Human Services Advisory Committee to develop the Equitable Housing Plan.
- Work with Ashland's Work with Ashland's Planning Commission and City Council to adopt the plan.
- Implement actions identified in the Plan.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
2024	2025	On-going

Funding or Revenue Implications

Staff time and available Planning Division tools and resources will be relied on to accomplish this strategy. Third party consultant services may be required to prepare plan and carrying out implementation steps (such as hosting staff trainings).

E. Disallow SFD in High Density R-3 Zone

Rationale

Efficient use of Ashland's residential land is key to ensuring that Ashland has adequate opportunities to grow from 2021 to 2041 and beyond. The City's Housing Capacity Analysis shows that Ashland has sufficient land within the UGB to accommodate growth over the 2021-2041 period but has very limited capacity (and nearly a deficit of land) for housing in the High-Density Residential zone. Disallowing single-family detached housing in the High Density Residential Plan Designation (R-3 zone) would preserve this zone for higher-density housing.

Description

The City can evaluate changes to Ashland's zoning code to disallow single-family detached housing in the High Density Residential Plan Designation (R-3 zone). Such a change may not include very small existing lots, where single-family detached housing is all that is buildable. The City should also consider compatibility in historic districts within R3 zones that are largely developed as single-family. The changes could be written such that they do not apply to properties within a historic district.

City Role

The City would amend the zoning code to remove single-family detached housing from the allowed uses in the R-3 zone.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. None

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
All residents	All levels of income	Owner and Renter	Indirect, low

Potential Risks

Disallowing single-family detached housing in existing residential neighborhoods may cause concern for existing residents. Additionally, residents could be concerned if this amendment has the potential to impact historic districts.

Implementation Steps

- Draft code amendment, including identifying opportunities to increase clarity of this section of the code.
- Work with Ashland's Planning Commission and City Council to get public input on and adopt the code revisions.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
2027	2028	On-going

Funding or Revenue Implications

Staff time and available Planning Division tools and resources will be relied on to accomplish this strategy.

F. Evaluate increasing allowances for residential dwellings in commercial and employment zones

Rationale

Lowering or eliminating barriers to residential development in commercial or mixed-use zones can help encourage the development of more dense multifamily housing in these zones, helping to meet the City's projected housing needs.

This action is intended to increase the supply of needed housing by promoting the development of mixed-use buildings, utilizing vacant commercial floor areas as regulated affordable rental housing, maintaining an inventory of employment parcels to attract new business development, and jumpstarting redevelopment in areas near public transit and daily services. The goal of this activity would be to allow the City to be responsive to changes in the economy and housing demand by providing more opportunities to develop housing in commercial areas.

Description

The City could evaluate increasing allowances for residential dwellings in commercial and employment zones, such as removing residential density caps and allowing an increased amount of residential uses in ground floor commercial spaces. Ashland City Council recently considered, but did not approve, an ordinance that included these types of amendments.¹⁸ Instead, Council directed City staff to evaluate this action after the next Economic Opportunities Analysis (EOA), which will calculate the City's employment and commercial land needs and projected employment growth. The next Economic Opportunities Analysis is scheduled for 2024.

¹⁸ In 2023, Ashland City Council considered but did not approve Ordinance 3205, which presented land use code amendments to the residential standards for mixed-use development in the Commercial (C-1) and Employment (E-1) zones. The proposed ordinance included a series of amendments to AMC Title 18 Land Use relating to the residential standards for mixed-use development located in the Commercial (C-1) and Employment (E-1) zones. Specifically, the proposed code amendments would increase the allowance for residential uses from 35 to 65 percent of the ground floor in multi-story, mixed-use buildings and developments located in the C-1 and E-1 zones and outside of the Downtown Design Standards overlay. Additionally, the development of flexible Commercial Ready Residential Space would allow residential uses within the 35% commercially designated floor area provided an agreement is executed with the City, or deed restriction is recorded on the property, demonstrating that the residential use will be in conformance with the Ashland Affordable Housing Program as affordable rental housing for households earning 80% AMI or less.

City Role

The City would evaluate potential amendments to commercial and employment zones that would encourage more housing development in these zones. The City would amend the zoning code to increase residential allowances and remove multifamily barriers in these zones.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. None

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
All residents	All levels of income	Owner and Renter	Moderate

Potential Risks

If this action resulted in removal of requirements for commercial or retail ground floor uses in areas intended for mixed use development; it could reduce the amount of available commercial or retail space available to meet the city's economic needs. Additionally, the removal of mixed-use requirements could result in more uniformly residential development in these areas, potentially reducing the amount of nearby services or amenities and impacting the walkability of the area.

Implementation Steps

- Draft code amendment including identifying opportunities to increase clarity of this section of the code.
- Work with Ashland's Planning Commission and City Council to get public input on and adopt the code revisions.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
2025	2026	On-going

Funding or Revenue Implications

Staff time and available Planning Division tools and resources will be relied on to accomplish this strategy.

G. Maintain quality and support preservation of existing manufactured home parks

Rationale

Preserve and support development of existing manufacturing housing parks because they play a significant role in providing naturally occurring affordable housing.

Description

Ashland has four manufactured home parks, as of November 2020, with a total of 255 spaces. Manufactured home parks provide opportunities for affordable housing for homeowners of a type that is not otherwise present in the housing market. Closure of manufactured home parks was common in Oregon during the mid-2000's and new manufactured home parks have not been developed in Oregon cities in the last decade or more.

Oregon regulates closure of manufactured home parks (in ORS 90.645). The State requires owners of manufactured home parks to give notice of closure or conversion of a manufactured home park. Manufactured home park owners are required to pay households a fee (of between about \$6,000 and \$10,000) when closing manufactured home parks.

In the face of closure or sale of a manufactured home park, preservation of manufactured home parks can be accomplished through a range of approaches, such as resident owned cooperatives or non-profit ownership. Since 2007, 30 manufactured home parks have been preserved statewide. In 2019, the Legislature funded a manufactured dwelling park loan program through OHCS specifically preserve manufactured home parks. Oregon Housing and Community Services (OHCS) works with Community Development Financial Institutions (CDFI) to preserve manufactured home parks through this loan fund.

Organizations that provide support for preservation of manufactured home parks includes: OHCS, Network for Oregon Affordable Housing, Banner Bank, and CDFIs. Nonprofits like CASA of Oregon and St. Vincent de Paul of Lane County have assisted with preservation of many of the 30 manufactured home parks.¹⁹ Between 2019 and September 2021, OHCS' manufactured dwelling park loan program supported preservation of a manufactured home park in Newport

Another approach is adopting a zone that allows manufactured home parks as a permitted use and prohibits other types of single-family detached or multifamily housing. Cities such as Cornelius and Portland have taken this approach.²⁰

The City can also support repair and rehabilitation of manufactured home parks as part of Action I.

Ashland could work with owners of manufactured home parks, especially those where redevelopment is being considered, to identify opportunities to preserve manufactured home parks through these approaches.

City Role

Working with owners and nonprofit organizations to support preservation efforts.

¹⁹ Based on information from the report *Washington County's Manufactured Housing Communities: Facts, Risks, and Resource*, Final Report, April 2022.

²⁰ *Washington County's Manufactured Housing Communities: Facts, Risks, and Resource*, Final Report, April 2022.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. Oregon Housing and Community Services (OHCS), owners of manufactured home parks

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Extremely-low, very-low, low-income households; existing residents of manufactured home parks	Households with incomes below 80% of MFI	Renter or Owner	None; Preservation of existing manufactured home parks

Potential Risks

Impacts are likely to be minor or have no negative impact. If zoning changes were implemented in such a way that property owners can demonstrate the land use regulations reduce the fair market value of their property, the property owner could file a Measure 49 claim and the city could be required to compensate the property owner based on the reduction in the fair market value of the property resulting from the land use regulation.

Implementation Steps

To support preservation of existing manufactured home parks:

- Draft code amendment to adopt a zone that allows manufactured home parks as a permitted use and prohibits other types of single-family detached or multifamily housing.
- Work with Ashland's Planning Commission and City Council to get public input on and adopt the code revisions.

To support preservation of existing manufactured home parks:

- Partner with nonprofits, the housing authority, and manufactured home park owners to support preservation efforts. Offer financial support where possible.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
2024	2025	On-going

Funding or Revenue Implications

If no specific funding or revenue source is identified at this time, staff time and available Planning Division tools and resources will be relied on to provide support in the form of letters of support, research on preservation options, and acting as a convener of stakeholders. Providing monetary resources to help preserve existing parks could result in a higher-cost strategy.

H. Increase development capacity of MFR dwellings through changes to the Land Use Ordinance

Rationale

Amending the Land Use Ordinance to allow for a wider range of development will help ensure there are development opportunities for needed housing types. Zoning changes that could remove barriers to the development of multifamily housing include increased density, increased allowable height, and reduced parking requirements. Prior analysis shows that two to three times as many units per acre as allowed under the current density standards can potentially fit on a typical site with limited changes to other development standards.²¹ Higher densities are especially important for small infill sites where efficiency is at a premium. Allowing more housing on a given infill site helps the City meet its housing needs with less land.

Description

The City could evaluate several amendments to the land use ordinance:

- Increasing the maximum allowed densities in the Multi-Family Residential (R-2), High Density Residential (R-3), and parts of the Normal Neighborhood and Croman Mill District designations.
- Increasing allowed height in the R-2 and R-3 multi-family residential zones, outside of designated historic districts, from 2 1/2 to 3 stories and from 35 to at least 40 feet, and up to 50 feet.
- Increasing lot coverage allowances slightly in the R-2 and R-3 zones to support the other code amendments.
- Evaluating the code to identify and remove unintentional barriers to density, such as the certain elements of the solar ordinance, parking or driveway requirements.

City Role

Draft amendments to the land use ordinance and work with Ashland's Planning Commission and City Council to adopt the revised standards.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. Area developers and stakeholders

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
All residents	All levels of income	Owner and Renter	Indirect, low

Potential Risks

Allowing greater density in existing residential neighborhoods may cause disruption and concern for existing residents.

²¹ ECONorthwest, *Ashland Housing Strategy Implementation Plan*, June 2019.

Implementation Steps

- Review development code to identify potential amendments that could allow greater density and remove barriers to density in the Ashland's high-density zones.
- Draft code amendments, including identifying opportunities to increase clarity of this section of the code.
- Work with Ashland's Planning Commission and City Council to get public input on and adopt the revised definitions.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
2027	2028	On-going

Funding or Revenue Implications

Staff time and available Planning Division tools and resources will be relied on to accomplish this strategy.

I. Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing

Rationale

The Multiple Unit Property Tax Exemption (MUPTE) program is flexible and eligibility criteria can be set locally, allowing the City to target the program to meet its needs. It offers an incentive for preservation and development of housing for low- to moderate-income households. It can offer an incentive for mixed-income housing, providing a way to leverage private, market-rate development to expand affordable housing.

Description

MUPTE allows cities to offer a partial property tax exemption (limited to the value of the housing, not the land) for multifamily development that meets specific locally established criteria, such as having an affordability agreement with a public agency. The terms of the affordability agreement can be set by the City—there are no specific income / affordability requirements in the state statute that enables the program.

The City could explore using MUPTE in two possible ways:

- To incentivize mixed income development through inclusion of below-market units (units affordable below 80% of MFI) in otherwise market-rate developments.
- To incentivize owners of existing low-cost market rate housing to rehabilitate properties without displacing existing tenants or escalating rents.

What does the exemption apply to? It applies to rental housing that is affordable at incomes at or below 120 percent, often in a mixed-income multifamily building. The exemption applies only to improvement value of the housing.

How long does it apply? The property tax exemption can be granted for up to 10 years, except that for low-income housing, exemption can be extended for as long as the housing is subject to the public assistance contract.

What taxing districts would participate? The property tax exemption only applies to city property taxes (which account for about 27% of property taxes in Ashland) unless the City gets affirmative support from at least 51% of overlapping taxing districts for the exemption to apply to their tax collections.

City Role

Implement the exemption and execute on annual reporting and administration procedures.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. Ashland Finance Department, School Districts, Jackson County and other overlapping Taxing Districts

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Middle-income renter households	60 – 80% of Median Family Income	Renter	Moderate

Potential Risks

The City and participating taxing districts will lose property tax income for the duration of the exemption, reducing revenue for city services and revenue for participating taxing districts.

Implementation Steps

To implement the exemption, the City would take the following steps:

- Determine desired eligibility criteria (percentage of affordable or workforce housing or other public benefits, where the program applies, etc.).
- Seek agreement from taxing districts representing 51% or more of the combined levying authority on the property to include all the taxing jurisdictions in the abatement. If the City is unable to get agreement from other taxing districts, the abatement will only apply to the City's portion of property taxes.
- Establish annual reporting and administration procedures.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
2028	2029	The property tax exemption can be used after adoption for as long as the City offers the tax exemption.

Funding or Revenue Implications

MUPTE reduces general fund revenues for all overlapping taxing districts. The City of Ashland must weigh the loss of tax revenue against value of the rent discounts offered by qualifying development.

J. Preserve and improve existing low-cost, unregulated, rental housing

Rationale

Keeping low-cost unregulated housing both habitable and affordable reduces the need for subsidized new construction. Rental housing that is affordable to low- and moderate-income households and not subject to affordability restrictions is typically older, privately-owned housing. This type of housing may have deferred maintenance issues due to a lack of resources to make improvements and pay for repairs (and, in some cases, owner neglect).

Description

The City can work with property owners of low-cost unregulated rental housing to support needed repairs without displacing tenants. This could include:

- Offer low-interest loans and/or grants to property owners for repairs and major rehabilitation, providing they do not displace residents.
- Evaluate reducing regulatory requirements and permitting challenges for owners seeking to improve older, rental housing.
- Provide information/technical assistance to smaller property owners regarding state and local resources to support weatherization and healthy housing.
- Use the Multiple Unit Property Tax Exemption to support rehabilitation.
- Provide information, resources, and grants to support accessibility upgrades to allow residents to age in place.

The City should consider funding sources available from the state and federal governments to support rehabilitation and weatherization. For instance, the City could consider pursuing grant funding through the Oregon Healthy Homes Program, which provides financial assistance to eligible homeowners and landlords to repair and rehabilitate dwellings.²² The City could pursue funding from other programs that fund rehabilitation or weatherization, such as the federal Weatherization Assistance Program.

City Role

The City could evaluate programs, technical assistance opportunities, regulatory changes, and other options to support property improvements. The City could provide grant funding in support of rehabilitation, weatherization or accessibility upgrades (e.g., through Community Development Block Grant (CDBG) funding, the Oregon Healthy Homes Program, or other programs).

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. ACCESS, Ashland Housing Authority, Habitat for Humanity, Rebuilding Together, property owners of low-cost, unregulated, rental housing

²² HB 2842 recently directed the Oregon Health Authority (OHA) to provide grants to third-party organizations to "provide financial assistance to eligible homeowners and landlords to repair and rehabilitate dwellings to address climate and other environmental hazards, ensure accessible homes for disabled residents, and make general repairs needed to maintain a safe and healthy home." Rulemaking is currently underway to allow funding for this program in the fall of this 2023. Cities and other eligible organizations can then apply for grants to fund these types of rehabilitation and repair programs.

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Low and middle-income renters	Households with incomes below 80% of MFI	Renter	Low

Potential Risks

If the City does not ensure that housing will be affordable at below 80% of MFI for the foreseeable future, the rent may increase, making the housing less affordable. Funds spent on this program would be unavailable for other city services.

Implementation Steps

- Get policy direction from City Council on implementing this action.
- Develop a list of lower-cost, unregulated, rental housing, including property locations, number of units per development, and property owner contact information.
- Evaluate programs, technical assistance opportunities, regulatory changes, and other options to support property improvements. This step can include multiple approaches, as noted in the description of this action.
- Reach out to property owners (identified in Step 1). Gauge their interest in improving the safety, health, and stability of their property. Determine what kinds of improvements their properties might need and what resources would be most useful to them.
- Refine and implement programs, technical assistance opportunities, regulatory changes, and other options (identified in Step 2) based on feedback from property owners.
- Develop requirements for maintaining lower cost rent as a condition of receiving financial assistance from this program.
- Connect interested property owners to established programs and opportunities.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
Get policy direction from Council - 2026	2027	On-going

Funding or Revenue Implications

Staff time and available Planning Division tools and resources will be relied on to accomplish this strategy. Providing low-interest loans or grants will require a funding source to backfill program dollars awarded/loaned. Beyond CDBG funding, no specific funding or revenue sources are identified or secured at this time. Implementation of a Multiple Unit Property Tax Exemption program (described in Strategy H.) would be required before MUPTE could be used to support rehabilitation.

K. Work with partners to support development of additional permanent supportive housing

Rationale

Permanent supportive housing is income-restricted housing that includes services with a goal of ending chronic homelessness. This type of housing is typically built with state funding, with a nonprofit or housing authority taking lead on such development. The City's role is as a partner to support its development. Working with nonprofits is key to meeting Ashland's need for housing and supportive services for people who need ongoing services over the long term.

Description

The City can work with partners, such as the housing authority or nonprofit developers, to support development of housing for households with very low incomes (or no income) that includes services necessary to help a person transition from homelessness into housing. This type of housing is typically multifamily and often funded through state and federal sources. The city can support these types of housing through facilitating the planning process, contributions of land (connected to the land banking action), direct project funding support, grant assistance, reduced fees for affordable housing (such as system development charges), funding off-site infrastructure, or other types of resources or support development for these housing types.

City Role

The City would work with service providers to identify and utilize funding and development assistance opportunities. The City could collaborate with Jackson County and neighboring jurisdictions to develop a regional approach to this strategy.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. Jackson County, Jackson County Continuum of Care, Housing Authority of Jackson County, Columbia Care, Maslow Project, ACCESS, Rogue Community Health, Asante, Jackson Care Connect, faith-based partners, neighboring jurisdictions

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Homeless community; Extremely low-income to low-income households, as well as underserved communities.	0-30% of Median Family Income	Renter	Low

Potential Risks

The largest risk is that more permanent supporting housing is not built.

Implementation Steps

The City should work with nonprofit agencies and developers in conjunction with the Continuum of Care to identify additional resources that the City may be able to provide support for, such as supportive housing and services to people experiencing homelessness in Ashland.

Building more permanent supportive housing is likely to be dependent on completion of other actions, such as use of land from a land bank (Action A), increase density allowed in multifamily buildings (Action G), and community education about need for income-restricted housing (Action C). In addition, funding from a potential CET (Action L) and potential Urban Renewal District (Action M) maybe crucial to developing this housing.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
2024	On-going	On-going

Funding or Revenue Implications

Staff time and available Planning Division tools and resources will be relied on to accomplish this strategy. If the City is contributing land, then the City is forgoing realizing the value of the land if it was sold on the open market. If the City is contributing funding directly to project or funding off-site infrastructure, the City will need to identify sources of funding. If the City offers reduced fees for affordable housing, the City must weigh the loss of revenue against the value offered by qualifying development.

L. Evaluate opportunities to improve energy efficiency and reduce greenhouse gas emissions during housing development

Rationale

The City of Ashland adopted its Climate and Energy Action Plan (CEAP) in March of 2017 “to reduce its emissions and improve its resilience to future impacts of climate change on its environment, infrastructure, and people. Housing that is developed with energy-efficient processes, uses energy-efficient materials, and operates in an energy efficient way over time can help the City meet its CEAP goals and can lower long term household energy costs.

Description

The City can incorporate elements of the CEAP into housing developments, including increased energy efficiency, solar access, electrical vehicle parking and charging opportunities, reduction of fossil fuels dependency, and increased resilience to natural hazards resulting from a changing climate (such as the risk of wildfire). The City could offer or facilitate energy efficiency incentives for new buildings, whether for sale or rental.

City Role

The City can evaluate opportunities to incorporate elements of the CEAP into housing developments. The City could also facilitate access to energy efficiency incentives available from the federal and state government, particularly for development of affordable housing. The City could also partner with the Conservation Division, which offers energy efficiency audits and a variety of incentives to homeowners.

The City expects to comply with the Climate Friendly and Equitable Communities Rules. The implementation of these rules may dovetail with and refine this strategy.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. Ashland Climate Policy Commission, Ashland Conservation Division, Ashland Electric Department, Ashland Building Division, local developers

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
All residents	All levels of income	Renter or Owner	Low

Potential Risks

Impacts are likely to be minor or have no negative impact.

Implementation Steps

- Evaluate opportunities and approach.
- Get policy direction from City Council on implementing this action.

- Implementation steps would depend on the specific incentives or requirements identified through the evaluation.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
Get policy direction from Council - 2029	2030	On-going

Funding or Revenue Implications

Staff time and available Planning Division tools and resources will be required to evaluate opportunities to improve energy efficiency and reduce greenhouse gas emissions during housing development. If incentives are provided in exchange for certain green building practices or certifications, this could require funding or reduce revenue.

Funding Sources

M. Establish a Construction Excise Tax

Rationale

Construction Excise Tax (CET) is one of few options to generate additional locally-controlled funding for affordable housing. A CET is intended to provide funding to support development of affordable housing. The funds from the CET are required by State law to be spent on developer incentives, supporting affordable housing programs, and homeownership programs. Ashland does not collect a Construction Excise Tax for affordable housing as allowed by SB 1533.

Description

CET is a tax assessed on construction permits issued by local cities and counties. The tax is assessed as a percent of the value of the improvements for which a permit is sought unless the project is exempted from the tax. The City could use CET revenue funds to support the development or re-development of affordable housing. Affordable housing itself is typically exempt from a CET, and as such this tax on new construction does not impact regulated affordable housing development.

In 2016, the Oregon Legislature passed Senate Bill 1533 which permits cities to adopt a construction excise tax (CET) on the value of new construction projects to raise funds for affordable housing projects. CETs may be residential only, commercial only, or residential and commercial. If the City were to adopt a CET, the tax would be up to 1% of the permit value on residential construction and an uncapped rate on commercial and industrial construction. The allowed uses for CET funding are defined by the state statute. The City may retain 4% of funds to cover administrative costs. The funds remaining must be allocated as follows, if the City uses a residential CET:

- 50% must be used for developer incentives (e.g. fee and SDC waivers, tax abatements, etc.)
- 35% may be used flexibly for affordable housing programs, as defined by the jurisdiction.
- 15% flows to Oregon Housing and Community Services for homeowner programs.

If the City implements a CET on commercial or industrial uses, 50% of the funds must be used for allowed developer incentives and the remaining 50% are unrestricted. The rate may exceed 1% if levied on commercial or industrial uses.

City Role

Develop and implement the plans for using CET funds for affordable housing development.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partners. Local developers, Chamber of Commerce, major employers, and the Ashland business community

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Depends on how revenue is used, but would be for extremely low, very low, and low-income and underserved communities.	Depends on how revenue is used, but most likely directed toward 0-60% of Median Family Income, however, could be used to meet other income groups, such as contribution to homeownership for households at 61-80% of Median Family Income.	Renter or Owner	Moderate to high

Potential Risks

Homebuyers and businesses that pay the CET will have slightly higher costs for their homes and for commercial or industrial development. The increase in home prices will not exceed 1% because of the CET and may be smaller if the City establishes a CET below 1%.

Implementation Steps

- Evaluate potential approach. Include projections on potential revenue and what programmatic goals could be accomplished with revenue. Include SWOT analysis for both residential and commercial/industrial.
- Engage with developers, major employers, and the business community in Ashland to evaluate tolerance for a CET on commercial and industrial development and where there are shared interests in supporting local housing production.
- Seek direction on whether to proceed with adoption from City Council at work sessions.
- Ashland City Council could impose the CET by adoption of an ordinance or resolution that conforms to the requirements of ORS 320.192–ORS 320.195.
- If directed, create a plan for the use of CET funds.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
2025	2026	If a CET is implemented, it may take several years for funds to accumulate to an amount that could be used to support development of housing.

Funding or Revenue Implications

Adopting a CET would provide funding for other strategies. Because a percentage (4%) of the revenue can be applied to the City's costs for administering the program, there should be minimal additional cost for the City.

N. Evaluate using Urban Renewal

Rationale

Urban renewal provides a flexible funding tool that can support many of the key strategies identified in the Housing Production Strategy. Urban renewal funds can be used to support development of off-site infrastructure necessary to support new housing development. In addition, urban renewal funds could be used to support rehabilitation of existing housing in poor condition, possibly with future requirements that it remain affordable at an income level like 80% or less of MFI.

Description

Ashland does not have an Urban Renewal District for Tax Increment Financing. Urban renewal can be used to support to support development of affordable housing, most likely in commercial areas.

The City could use Urban Renewal to support development of infrastructure necessary to support housing development. The City could coordinate Capital Improvements Program and Transportation System Plan infrastructure investments in areas identified for multi-family, mixed-use and transit-oriented housing developments.

The City will need to decide how to use the funding. The best use of funding may be in coordination with other actions in the HPS, such as with land banking and support of development of income-restricted housing.

City Role

Evaluate the potential to use Urban Renewal to support infrastructure and affordable housing, including developing a set aside share of Tax Increment Financing (TIF) revenue to support infrastructure development necessary for new housing. The City would need to develop and implement an Urban Renewal Plan, establish an Urban Renewal Agency, and select projects to fund through Urban Renewal.

Partners and their Role

Lead Partner. Ashland Planning Division

Partners. Ashland Finance Department, Ashland Public Works Department, and property owners within the Urban Renewal Area.

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Low- and middle-income householders	All levels of income	Renter or Owner	Moderate

Potential Risks

The City and participating taxing districts will forgo revenue increases from increasing property value for the duration of the Urban Renewal district(s), decreasing property tax revenues in the district(s).

Implementation Steps

- As part of Urban Renewal planning for a potential new district, evaluate whether a housing set-aside is an appropriate expenditure for the district and how much can be allocated while balancing the need for infrastructure investments.
- Should a new Urban Renewal district be deemed appropriate, proceed with creating and adopting an Urban Renewal Plan. Establish priorities for the area, identify a project list, consult with taxing districts, prepare a feasibility study, prepare required plan documents, and hold adoption hearings.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
Evaluate approach – 2026 Develop plans – 2027 Adopt – 2028	2029	After implementation, it would likely be several years before there is sufficient revenue in the Urban Renewal District to have enough funds to make significant investment in housing.

Funding or Revenue Implications

TIF results in foregone tax revenue for the City and other overlapping taxing districts for several decades, though it can (and should) grow the tax base in the long-term by supporting development that would not otherwise have occurred.

O. Identify additional funds to support the Affordable Housing Trust Fund

Rationale

Identifying additional funding sources for Ashland's Affordable Housing Trust Fund would support the development of affordable housing. Affordable housing trust funds are public sector tools used to provide direct financial resources to the development of affordable housing for low income households.

Description

The Ashland Affordable Housing Trust Fund was formed in 2008 with the goal of encouraging the creation of housing for homeownership or rent at a cost that will enable low and moderate income families to afford quality housing while paying no more than thirty per cent of gross household income on housing. To be successful in this goal a dedicated and sustainable source of revenue is needed for the AHTF.

One option is a General Obligation (GO) Bond, which could provide a stable, dedicated revenue source to fund infrastructure to support affordable housing, land acquisition, property acquisition, and direct project subsidies through increased property tax rates. GO bonds are issued for a specific dollar amount and paid for over the period of the bond through increased property taxes. Because they are legally limited to use for capital investments and require a public vote to enact, these bonds are typically used for major infrastructure investments (such as roadway improvements that benefit all, or nearly all, of a city's residents). However, GO bonds can be used for land acquisition or affordable housing development if the city's residents agree to fund them. Bonds cannot be used for supportive services or for operations. GO bonds are not subject to Measure 5 and 50 rate limits. They can be structured to provide revenue in increments over time, rather than in one large up-front amount.

Other funding sources could also be considered such as transfer of development density fees, transient occupancy tax, continuing the use of Marijuana tax funds, or providing one time contributions to the fund through bequests or the sale of surplus city property. The City does not currently have a mechanism for accepting funding through bequests and private donations, and would need to work with their legal and accounting departments to set this mechanism up. The City may want to lobby the Legislature to allow for other mechanisms for funding affordable housing, such as allowing a Real Estate Transfer Tax.

City Role

The City would develop a funding plan, conduct polling/engagement, develop ballot initiative, implement projects (if successful). The City could also evaluate opportunity for use of other funding sources.

Partners and their Role

Lead Partner. City of Ashland Planning Division

Partner 2. City of Ashland Finance Department, Legal Department, Ashland City Council, Ashland residents

Anticipated Impacts

Populations Served	Income	Housing Tenure	Magnitude of New Units Produced
Extremely and very-low-income households	Households up to 60% of the Median Family Income	Renter or Owner	Moderate to High

Potential Risks

Funds spent on affordable housing will be unavailable for other city services and may require additional resources to sustain the ongoing operations of new projects. Community support for some of these options, such as a GO bond, may be weak, resulting in no action on issuing a bond.

Implementation Steps

- Identify and evaluate new sources of funding for income-restricted affordable housing.
- Get policy direction from City Council on implementing this action.
- Implement suitable funding sources. This step will vary by funding source (an example is provided below).

General Obligation Bond Implementation Steps:

- The City of Ashland will need to evaluate the types of projects they wish to include on the ballot (and their costs) to determine a bond rate. The bond funds may only be used to pay for capital costs related to construction; acquisition or rehabilitation of residential buildings for affordable housing; other capital construction costs; predevelopment costs; and administrative costs.
- The City should vet projects with the general public to gauge acceptability. They should also educate the public about the proposed projects' value.
- General obligation bonds are issued with long-term, fixed rates. The City of Ashland should evaluate the type of bond it will pursue (20-year or 30-year).
- General obligation bonds must be approved by a simple majority through a ballot measure.

Implementation Timeline

Timeline for Adoption	Implementation to Commence	Timeframe of Impact
Get policy direction from Council - 2025	2026	It may take several years before there is sufficient revenue to have enough funds to make significant investment in housing.

Funding or Revenue Implications

Depends on funding source implemented; it is recommended that the City consider using general obligation bond revenue to leverage additional funds (from potential partners or grantors) to support development of affordable housing. This action will generate new funding, likely for capital costs, but will require additional staff time to administer the new revenue. The GO Bond funds could cover administrative costs related to the capital costs funded by the bond.

Recommendations for Future Actions

The following actions, while important and useful, will not be included as strategies in the HPS. Instead, the HPS will include them as recommendations that the City may want to consider in the future or as part of another process. The City will not have to report on progress towards these actions.

- **Develop pre-approved plan sets for Middle Housing Typologies and Accessory Dwelling Units.** As a follow-up to HB 2001 implementation, the City should develop pre-approved plans for middle housing typologies, such as cottage clusters, townhomes, and other middle-income housing types as well as accessory dwelling units. The plans should be highly efficient, designed for constrained lots and low-cost solutions, and would allow for streamlined permitting. The city could consider adopting pre-approved plans developed by other cities or working with other cities to develop pre-approved plans. For pre-approved plan sets, the Building Department may decrease the charges (plan check fee) by as much as 50% and decrease the approval time (possibly as short as three days).
- **Consider staff capacity for implementation of the HPS.** Staff has the capacity and expertise to implement some, but not all, of the strategies included in the HPS. For instance, the City may need to hire consultant services for grant writing, zoning amendments, or strategies that require specific technical expertise, such as implementation of a TIF district. The City should review the HPS to consider staff capacity and assess where additional assistance would be needed in order to implement the HPS. The City should also do an assessment of staff capacity on a case-by-case basis at the beginning of each strategy

4. Evaluation: Achieving Fair and Equitable Housing Outcomes

This chapter presents an evaluation of the goals and strategic actions for achieving fair and equitable housing outcomes. It also includes a discussion of monitoring the outcomes of Ashland's HPS.

Evaluation of the Policies and Strategic Actions

OAR 660-008 requires an evaluation of all the HPS for achieving the following types of outcomes. The discussion below provides a brief evaluation of each of the expected outcomes for the policies and actions of the HPS, with a focus on housing opportunities for federal and state protected classes.²³ This is not intended to be an exhaustive evaluation of how each action addresses these outcomes but a high-level overview of the HPS as a whole.

- **Affordable Homeownership.** This criteria focuses on actions that support production of housing affordable for homeownership and includes actions to support development of housing affordable at less than 120% of MFI. Many of the actions in the HPS support development of affordable housing for homeownership through supporting development of lower-cost ownership housing, removing regulatory barriers to development of affordable ownership housing, supporting Fair Housing, and making capital improvements necessary to support affordable ownership housing. Some of the actions within the HPS that support affordable homeownership include:
 - *Existing actions and programs*
 - Zoning amendments to allow a broader array of more affordable unit types in a wider variety of zones including middle housing, live-work, tiny homes, small lots, cottage housing, garden apartments, and higher residential density development.
 - Ashland scales SDCs so that smaller units pay lower SDCs, potentially increasing affordability.
 - Ashland provides a density bonus for development of for energy-efficient housing.
 - *Actions in the HPS*

²³ Federal protected classes are: race, color, national origin, gender, familial status, and disability. Oregon's additional protected classes are: marital status, source of income, sexual orientation, and status as a domestic violence survivor. Under Fair Housing laws, it is illegal to deny access to housing in based on the characteristics of people within these protected classes.

- Evaluate participating in or establishing a land bank
- Evaluate participating in a land trust
- Disallow SFD in High Density R-3 Zone
- Maintain quality and support preservation of existing manufactured home parks
- Increase development capacity of MFR dwellings through changes to the Land Use Ordinance
- Establish a Construction Excise Tax
- Evaluate using Urban Renewal
- Identify additional funds to support the Affordable Housing Trust Fund
- **Affordable Rental Housing.** Supporting affordable rental housing includes actions to support production of both income-restricted affordable housing (affordable to households with incomes below 60% of MFI) and privately developed affordable housing (affordable for households with incomes between 61% and 80% of MFI). Actions within the HPS that support affordable rental housing development include:
 - *Existing actions and programs*
 - Zoning amendments to allow a broader array of more affordable unit types in a wider variety of zones including middle housing, live-work, tiny homes, small lots, cottage housing, garden apartments, and higher residential density development.
 - Ashland scales SDCs so that smaller units pay lower SDCs, potentially increasing affordability.
 - Ashland provides density bonuses for development of affordable housing at higher densities and for energy-efficiency.
 - Affordable Housing Standards Ordinance and removal of other regulatory barriers to encourage development of new smaller units and multifamily units.
 - Financial incentives to encourage development of affordable housing.
 - Affordable Housing Trust Fund
 - Inclusionary zoning as part of new residential annexations.
 - *Actions in the HPS*
 - Evaluate participating in or establishing a land bank
 - Evaluate participating in a land trust
 - Disallow SFD in High Density R-3 Zone
 - Maintain quality and support preservation of existing manufactured home parks

- Increase development capacity of MFR dwellings through changes to the Land Use Ordinance
- Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing
- Establish a Construction Excise Tax
- Evaluate using Urban Renewal
- Identify additional funds to support the Affordable Housing Trust Fund
- **Housing Stability.** Increasing housing stability includes actions that increase the stability of existing households and prevent displacement, mitigating gentrification resulting from public investments or redevelopment. Actions within the HPS that address housing stability include:
 - *Existing actions and programs*
 - Tenants Rights Ordinance
 - Ordinances to preserve existing housing supply
 - Ashland regulates conversion of rental housing to condominiums.
 - *Actions in the HPS*
 - Host educational events with the Housing and Human Services Advisory Committee or other organizations.
 - Develop an equitable housing plan
 - Maintain quality and support preservation of existing manufactured home parks
 - Preserve and improve existing low-cost, unregulated, rental housing
- **Housing Options for People Experiencing Homelessness.** Increasing options for people experiencing homelessness includes working with partners and identifying ways to address homelessness and actions that reduce the risk of households becoming homeless (especially for households with income below 30% of MFI). The HPS includes the following options for people experiencing homelessness:
 - *Existing actions and programs*
 - Community Development Block Grant funding towards affordable housing and shelter and funding to service providers benefiting extremely low-income individuals.
 - Affordable Housing Trust Fund contributions to affordable housing development and safety net housing.
 - *Actions in the HPS*
 - Work with partners to support development of additional permanent supportive housing

- Identify additional funds to support the Affordable Housing Trust Fund
- **Housing Choice.** Increasing housing choice involves increasing access to housing for communities of color, low-income communities, people with disabilities, and other state and federal protected classes. Increasing housing choice also means increasing access to existing or new housing that is located in neighborhoods with healthy and safe environments and high-quality community amenities, schooling, and employment and business opportunities. Actions within the HPS that increase housing choice include:
 - *Existing actions and programs*
 - Zoning amendments to allow middle housing, live-work, tiny homes, small lots, higher residential density and clustered residential development.
 - *Actions in the HPS*
 - Evaluate participating in or establishing a land bank
 - Evaluate participating in a land trust
 - Disallow SFD in High Density R-3 Zone
 - Maintain quality and support preservation of existing manufactured home parks
 - Increase development capacity of MFR dwellings through changes to the Land Use Ordinance
 - Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing
 - Preserve and improve existing low-cost, unregulated, rental housing
 - Identify additional funds to support the Affordable Housing Trust Fund
- **Location of Housing.** Diversifying the location of housing requires increasing options for residential development that is compact, in mixed-use neighborhoods, and available to people within state and federal protected classes. This measure is intended, in part, to meet statewide greenhouse gas emission reduction goals. Actions within the HPS that support development of compact, mixed-use neighborhoods include:
 - *Existing actions and programs*
 - Zoning amendments to allow a broader array of more affordable unit types in a wider variety of zones including middle housing, live-work, tiny homes, small lots, cottage housing, garden apartments, and higher residential density development.
 - Transit Triangle Overlay allowed more housing development in this transit-supportive area.
 - Ashland gives parking credits in areas with transit facilities.
 - Ashland established a Vertical Housing Development Zone.

- *Actions in the HPS*
 - Disallow SFD in High Density R-3 Zone
 - Increase development capacity of MFR dwellings through changes to the Land Use Ordinance
 - Evaluate using Urban Renewal
- **Fair Housing.** Supporting Fair Housing is accomplished by increasing access to housing for people in state and federal protected classes, Affirmatively Furthering Fair Housing, addressing disparities on access to housing opportunity for underserved communities, and decreasing patterns of segregations or concentrations of poverty. Actions within the HPS that further Fair Housing policies include:
 - *Existing actions and programs*
 - Education, outreach, and compliance enforcement through partnership with the Fair Housing Council of Oregon,
 - Educational events with elected and appointed officials and for the public.
 - Past support for the Center for Non-Profit Legal Services for fair housing assistance through the City's Social Service Grant fund.
 - *Actions in the HPS*
 - Production of affordable rental and homeownership housing, increasing housing stability, identifying housing options for people experiencing homelessness, and increasing housing choice are all part of supporting Fair Housing. These issues are addressed above.
 - Host educational events with the Housing and Human Services Advisory Committee or other organizations.
 - Develop an Equitable Housing Plan

Taken together, the policies and actions included in Ashland's Housing Production Strategy are intended to work together to achieve equitable outcomes for all residents of Ashland, with an emphasis on improving outcomes for underserved communities, lower-income households, and people in state and federal protected classes.

Assessment of Benefits and Burdens from the Action

Ashland is required to consider the anticipated benefit and burden from each action for the following groups of people who have been historically marginalized: low-income communities, communities of color, people with disabilities, and other state and federal protected classes.²⁴

Exhibit 17. Assessment of Benefit and Burden for Historically Marginalized Communities as a Result of Each Action

Strategies	Benefits	Burdens
A. Evaluate participating in or establishing a land bank.	- Depending on the structure, could benefit households at extremely low income, very low-income, low-income, and limited moderate-income households. - The groups more likely to have incomes qualifying for this action are disproportionately marginalized communities, including POC, people with disabilities, and seniors. - In the development agreement for land in the land bank, the City may want to require outreach to members of marginalized communities for occupancy of new rental housing or as part of sales of ownership housing. The purpose of the outreach is to ensure that marginalized communities are aware of and have an opportunity to live in the new housing, if they meet income and other qualifications.	Unlikely to increase burdens for these communities.
B. Evaluate opportunities to participate in a land trust.	- Depending on the structure, could benefit households at extremely low income, very low-income, low-income, and limited moderate-income households. - The groups more likely to have incomes qualifying for this action are disproportionately marginalized communities, including POC, people with disabilities, and seniors. - Some land trusts specialize in providing services to these communities. To increase benefits to people in state and federal protected classes, the City may want to consider focus on working with land trusts that prioritize working with these groups of people.	Unlikely to increase burdens for these communities.

²⁴ Federal protected classes include: race, color, religion, national origin, age, sexual orientation, gender identify, familiar status, and disability. Oregon's protected classes include: race, color, national origin, religion, disability, sex (including pregnancy), sexual orientation, gender identify, age, and marital status.

Strategies	Benefits	Burdens
C. Host educational events with the Housing and Human Services Advisory Committee or other organizations	Will benefit households with all income levels with an emphasis on benefit to people most likely to experience housing discrimination, which includes POC, people with disabilities, seniors, and other protected classes.	Unlikely to increase burdens on POC, people with disabilities, seniors, and other protected classes.
D. Develop an equitable housing plan	Will benefit households with all income levels with an emphasis on benefit to people most likely to experience housing discrimination, which includes POC, people with disabilities, seniors, and other protected classes.	Unlikely to increase burdens on POC, people with disabilities, seniors, and other protected classes.
E. Disallow SFD in High Density R-3 Zone	Could benefit households at all income levels.	Unlikely to increase burdens on POC, people with disabilities, and seniors.
F. Evaluate increasing allowances for residential dwellings in commercial and employment zones	Will benefit households at all income levels. May increase overall housing availability for people in Ashland, potentially decreasing competition for lower-cost housing slightly, which may benefit marginalized communities.	Unlikely to increase burdens on POC, people with disabilities, and seniors.
G. Maintain quality and support preservation of existing manufactured home parks	Will benefit existing manufactured home park residents, who are likely to have extremely low, very-low, low-income households. The groups more likely to have incomes qualifying for this action are disproportionately POC, people with disabilities, and seniors.	- Unlikely to increase burdens for these communities. - If POC, people with disabilities, or seniors have been excluded from living in the manufactured home parks, they cannot benefit from this action.
H. Increase development capacity of MFR dwellings through changes to the Land Use Ordinance	Depending on the structure, could benefit households at all income levels.	Unlikely to increase burdens on POC, people with disabilities, and seniors.
I. Implement the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing	Will benefit low- to middle-income households.	Unlikely to increase burdens for these communities.
J. Preserve and improve existing low-cost, unregulated, rental housing	Will benefit renter households of lower-cost rental housing. To the extent that POC, people with disabilities, and seniors are more likely to live in lower-cost rental housing, they may benefit more from this action than households with middle- and higher incomes.	Unlikely to increase burdens on POC, people with disabilities, and seniors.

Strategies	Benefits	Burdens
	If the City is contracting with another agency to manage the program, the City may want to consider focus on working with agencies that prioritize working with marginalized communities or require outreach specific to marginalized communities.	
K. Work with partners to support development of additional permanent supportive housing	- Will benefit extremely low-, and very low-income households and people experiencing homelessness. The groups more likely to have incomes qualifying for this action are disproportionately POC, people with disabilities, and seniors. - The City may want to require that the developer perform outreach to marginalized communities to ensure they have opportunities to occupy the new housing.	- Unlikely to increase burdens for these communities. - Could have less positive impact for POC, people with disabilities, or seniors if these communities are not recruited from for participation in the program.
L. Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development	Depending on the policy approach, this action could benefit households of all incomes level. A focus on energy efficiency incentives for affordable housing would benefit extremely low-, very low, low- and middle-income households. A focus on energy efficiency incentives for homeowners would benefit higher income households.	Will depend on the policy approach the City takes after evaluating options. If the policy approach includes requiring elements of the CEAP in housing developments, the cost of those improvements could be passed on to tenants. The City could evaluate ways to mitigate such an increase in housing costs such as incentives that lower development costs.
M. Establish a Construction Excise Tax	- The CET could benefit households at extremely low-, very low-, low- and middle-income households, depending on the City's funding priorities. - The City is required to use half of funds for developer incentives for affordable housing. - Fifteen percent of funds go toward statewide affordable housing programs, which would benefit low- and middle-income households. - Thirty five percent of funds go toward affordable housing programs. The City has full discretion on how to use these funds.	Developers may pass along some of the costs of the tax to future renters. However, many renters in new market-rate buildings would be middle- to high-income households.
N. Evaluate using Urban Renewal	- Will benefit extremely low-, very low, low- and middle-income households, depending on how the City prioritizes funding. - The groups more likely to have incomes qualifying for this action are disproportionately marginalized communities, including POC, people with disabilities, and seniors.	As property values increase in an Urban Renewal District, there is a potential for displacing existing residents. The City could evaluate incorporating anti-displacement strategies into their Urban Renewal plan to mitigate this risk.

Strategies	Benefits	Burdens
O. Identify additional funds to support the Affordable Housing Trust Fund	Will benefit extremely low-, very low, low- and middle-income households, depending on how the City prioritizes funding.	Unlikely to increase burdens for these communities.

Monitoring Outcomes of the HPS

This is Ashland’s first HPS. As a result, the City is required to describe how it will measure the implementation and progress of the HPS. This section focuses on these issues.

Ashland is required to report progress on implementation of the HPS to DLCD every four years.²⁵ This report must include:

- **A summary of the actions taken to implement the HPS.** If there are actions that the City has not implemented on the schedule for the first four years of the HPS (i.e., actions expected to be adopted by December 31, 2024), the City needs to provide an explanation of the barriers to implementation and a plan for addressing the need that the action was intended to address. That plan could include identification of other actions in the HPS that will meet the identified need or it could include development of a new action to meet the need.
- **A reflection of the efficacy of the actions the City has implemented.** This reflection should discuss the outcomes the City is observing from the actions they have implemented to date and could include expectations for future outcomes.
- **A reflection of the efficacy of the actions in the context of the outcomes described above.** This section evaluates the goals and actions in the HPS for expected outcomes such as increasing housing options for affordable homeownership, affordable rental housing, housing stability, housing options for people experiencing homelessness, housing choice, location of housing, and Fair Housing. The report should describe whether the goals and actions implemented have resulted in the outcomes described above.

In addition, Ashland is required to report about actions that will not be adopted on the schedule presented in Exhibit 16. The City must notify DLCD that it will be unable to adopt the action within 90 days of the end of the timeline to implement the action. This notice must identify the actions or combinations of actions that the City will take to address the need that the action was intended to address. This could include identification of other actions in the HPS that will meet the identified need or it could include development of a new action to meet the need.

The City will review its progress toward the plan on an annual basis, coinciding with Council work planning. During the review, the City will report on the implementation actions taken

²⁵ This report is due to DLCD no later than December 31 four years after Ashland adopts its HPS.

over the previous year for the strategies in progress or scheduled to begin that year, along with the housing development activity that has occurred. Every four years, these annual updates will be combined into a report. Key questions that Council can consider in its assessment include:

- Are additional actions needed to address new or changing conditions?
- Is staff capacity sufficient to meaningfully advance the strategies?
- What benefits has the City seen from its efforts to date? Are the City's residents, and especially its lower-income residents and communities of color, seeing a return on the investments that the City has made?

In addition, the City can track indicators of plan progress in Exhibit 18.

Exhibit 18. Monitoring by Strategy

Strategies	Annual monitoring
Overall Monitoring	▪ Number of affordable units developed by income range ▪ Number of affordable projects developed
Evaluate participating in or establishing a land bank.	▪ Number of acres acquired for land banking ▪ Number of dwelling units developed on land from land banking ▪ Amount of funding contributed to land bank
Evaluate opportunities to participate in a land trust.	▪ Number of partnerships with land trusts ▪ Number of acres contributed to land trusts ▪ Amount of funding contributed to land trust ▪ Number of dwelling units developed in land trusts
Host educational events with the Housing and Human Services Advisory Committee or other organizations	▪ Number of events hosted ▪ Number of attendees at events ▪ Demographics of attendees ▪ Topics of events, such as affordable housing or Fair Housing
Develop an equitable housing plan	▪ Equitable housing plan developed and adopted.
Disallow SFD in High Density R-3 Zone	▪ Ordinance developed and approved. ▪ Comparison of newly developed housing in R-3 with historical densities
Maintain quality and support preservation of existing manufactured home parks	▪ Ordinance developed and approved. ▪ Number of partnerships established to support preservation efforts. ▪ Amount of funding contributed to support preservation. ▪ Changes in manufactured park ownership
Increase development capacity of MFR dwellings through changes to the Land Use Ordinance	▪ Ordinance developed and approved. ▪ Comparison of newly developed multifamily housing with historical densities
Implement the Multiple Unit Property Tax Exemption (MUPTe) to support multifamily or affordable housing	▪ Exemption developed and implemented ▪ Number of inquiries about tax exemption ▪ Number of projects (and units) granted tax exemption
Preserve and improve existing low-cost, unregulated, rental housing	▪ Amount of funding used for rehabilitation or preservation ▪ Number of units where funding was given for rehabilitation or preservation ▪ New partnerships established or expanded for preservation
Work with partners to support development of additional permanent supportive housing	▪ New partnerships established or expanded ▪ Number of permanently supportive housing projects (and units) developed
Evaluate opportunities to improve energy efficiency and reduce GHG emissions during housing development	▪ Number of new ordinances or policies that encourage energy efficiency ▪ Number of new housing units developed under those policies.
Establish a Construction Excise Tax	▪ Ordinance adopted ▪ Plan developed for the use of CET funds. ▪ Use of CET funds

	▪ Number and types of units developed supported by CET; affordability levels
Evaluate using Urban Renewal	▪ Urban Renewal Plan developed and adopted ▪ Amount of funding investments made with urban renewal dollars to support affordable housing ▪ Number of all units and of affordable units built using urban renewal dollars
Identify additional funds to support the Affordable Housing Trust Fund	▪ Additional funding sources identified. ▪ Amount of additional funding directed to the Affordable Housing Trust Fund. ▪ Use of AHTF funds ▪ Number and types of units developed supported by AHTF; affordability levels

In addition, the City could monitor current market conditions to help the Council understand the context in which the overall Housing Production Strategy is operating:

- Number and type of new homes produced and total within the city over time - tenure, size, sales price/asking rent, and unit type
- Share of rent-burdened residents
- Sales prices and rents for existing homes
- Number, location, and expiration date of regulated affordable units with change in units provided over time

When Ashland produces its next HPS in eight years, the City will be required to summarize the efficacy of each action included in this HPS. The information resulting from these measures will help Ashland to summarize the outcomes and efficacy of the actions in this HPS.

Appendix A: Contextualizing Ashland's Housing Needs

This chapter provides information to contextualize Ashland's housing needs. It provides an understanding of the issues, before solutions are proposed. This appendix draws its information and findings from other planning efforts, described in the main report. Where appropriate, this appendix also draws on information gathered through the City of Ashland's past engagement efforts with housing producers and consumers, including underrepresented communities.

As a part of providing context to better understand Ashland's housing needs, this appendix presents information about housing in Ashland for race, ethnicity, age, disability status, and other characteristics of the community to understand disproportionate housing impacts on different groups.

Demographic and Socio-Economic Characteristics Affecting Ashland's Housing Needs

This section describes unmet housing needs for people in Ashland by age, race and ethnicity, disability, household size and composition, and household income.

Data Used in this Analysis

Throughout this analysis data is used from multiple well-recognized and reliable data sources. One of the key sources for housing and household data is the U.S. Census. This report primarily uses data from two Census sources:²⁶

- The **Decennial Census**, which is completed every ten years and is a survey of *all* households in the U.S. The Decennial Census is considered the best available data for information such as demographics (e.g., number of people, age distribution, or ethnic or racial composition), household characteristics (e.g., household size and composition), and housing occupancy characteristics. As of 2020, the Decennial Census does not collect

²⁶ It is worth commenting on the methods used for the American Community Survey. The American Community Survey (ACS) is a national survey that uses continuous measurement methods. It uses a sample of about 3.54 million households to produce annually updated estimates for the same small areas (census tracts and block groups) formerly surveyed via the decennial census long-form sample. It is also important to keep in mind that all ACS data are estimates that are subject to sample variability. This variability is referred to as "sampling error" and is expressed as a band or "margin of error" (MOE) around the estimate.

This report uses Census and ACS data because, despite the inherent methodological limits, they represent the most thorough and accurate data available to assess housing needs. We consider these limitations in making interpretations of the data and have strived not to draw conclusions beyond the quality of the data.

more detailed household information, such as income, housing costs, housing characteristics, and other important household information.

- The **American Community Survey (ACS)**, which is completed every year and is a *sample* of households in the U.S. The ACS collects detailed information about households, including demographics (e.g., number of people, age distribution, ethnic or racial composition, country of origin, language spoken at home, and educational attainment), household characteristics (e.g., household size and composition), housing characteristics (e.g., type of housing unit, year unit built, or number of bedrooms), housing costs (e.g., rent, mortgage, utility, and insurance), housing value, income, and other characteristics.

This report primarily uses data from the 2014-2018 and 2015-2019 ACS for Ashland and comparison areas.²⁷ Where information is available and relevant, we report information from the 2000 and 2010 Decennial Census.²⁸ Among other data points noted throughout this analysis, this report also includes data from Oregon's Housing and Community Services Department, the United States Department of Housing and Urban Development, Costar, and other sources.

Age of People in Ashland

Population growth is the primary driver of growth in housing. Between 2000 and 2021, Ashland's population grew by 2,032 people (10%) with most of the growth occurring between 2010 and 2021 where Ashland's population grew by 1,476 new residents. Between 2000 and 2021, Ashland grew at a slower rate than Jackson County.²⁹

Growth in Ashland's senior population, as well as other age cohorts, will continue to shape the city's housing needs. Seniors account for 31% of Ashland's existing population and Jackson County expects to have more than 18,458 more people over 60 years old by 2040 than in 2020.³⁰

Growth in the number of seniors will result in demand for housing types specific to seniors, such as small and easy-to-maintain dwellings, assisted living facilities, or age-restricted developments. Senior households will make a variety of housing choices, including remaining in their homes as long as they are able, downsizing to smaller single-family homes (detached

²⁷ Five-year 2020 ACS data was not available when this report was compiled.

²⁸ The 2020 Census was completed at the end of 2020. However, extenuating circumstances brought on by the COVID-19 pandemic has led to some challenges with the data. The Census Bureau is undergoing a post-enumeration survey to understand the accuracy of the 2020 Census which was not complete as of February 2022. The 2020 Decennial Census data is more limited than usual as a result of the COVID-19 pandemic.

²⁹ Certified Population Estimates July 1, 2021, prepared by the Population Research Center at Portland State University.

³⁰ Final Population Forecast for Jackson County, prepared by the Population Research Center at Portland State University, June 20, 2017.

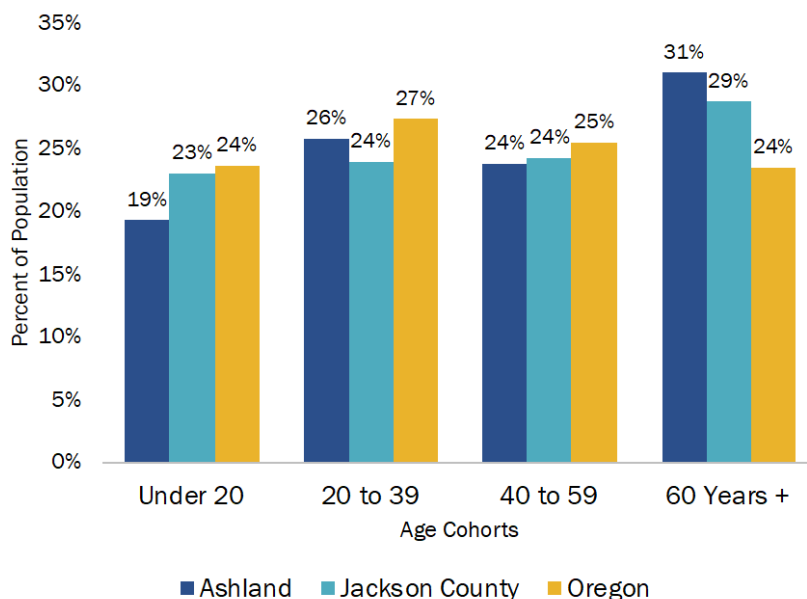
and attached) or multifamily units, moving in with family, or moving into group housing (such as assisted living facilities or nursing homes), as their health declines.

50% of Ashland's residents were between the ages of 20 and 59 years.

Ashland had a larger share of people over the age of 60 than the county and state and a smaller share of residents under the age of 20.

Exhibit 19. Population Distribution by Age, Ashland, Jackson County, and Oregon, 2014-2018

Source: U.S. Census Bureau, 2014-2018 ACS, Table B01001.

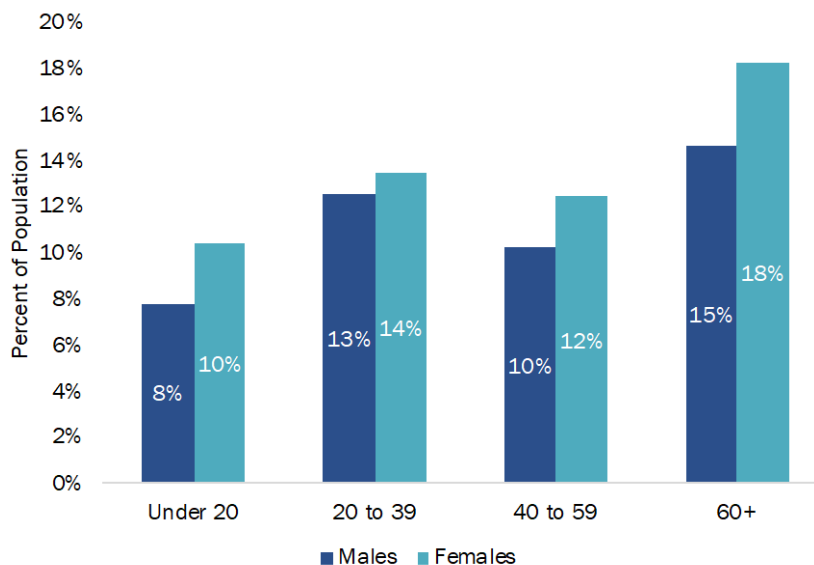


About 55% of Ashland's population is female and 45% is male.

Females account for a larger share of population among each age group, with the largest different for people 60 years and older.

Exhibit 20. Population by Age and Sex, Ashland, 2015-2019

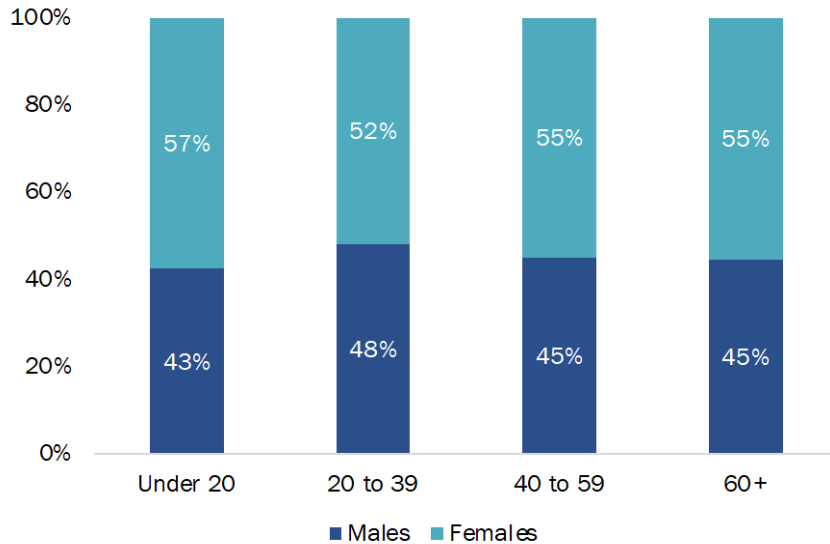
Source: U.S. Census Bureau, 2014-2018 ACS, Table B01001.



There are more females in every age group than males.

Exhibit 21. Population Distribution by Sex for Each Age Group, Ashland, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS, Table B01001.

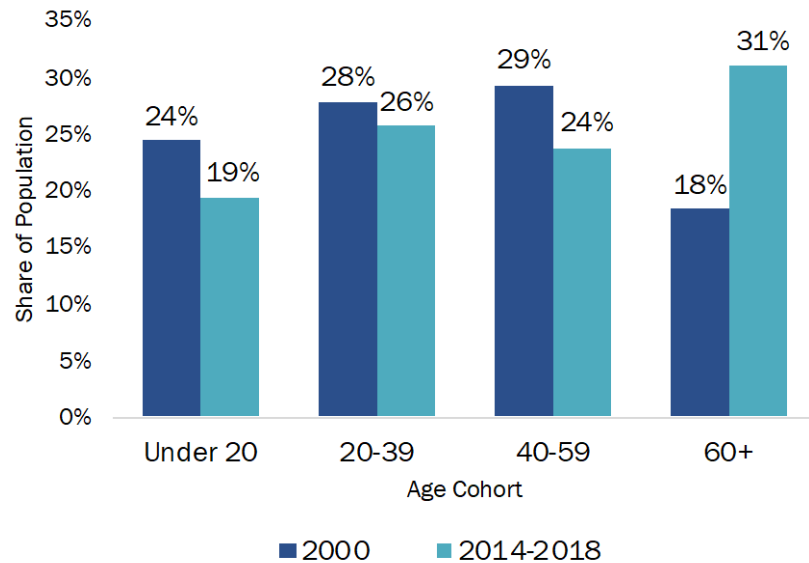


Between 2000 and 2018, the population aged 60 and older grew the most.

In this time, those aged 60 years and older grew by 2,909 people (from 3,509 people in 2000 to 6,499 people in 2018).

Exhibit 22. Population Growth by Age, Ashland, 2000, 2014–2018

Source: U.S. Census Bureau, 2000 Decennial Census Table P012 and 2014–2018 ACS, Table B01001.



Race and Ethnicity

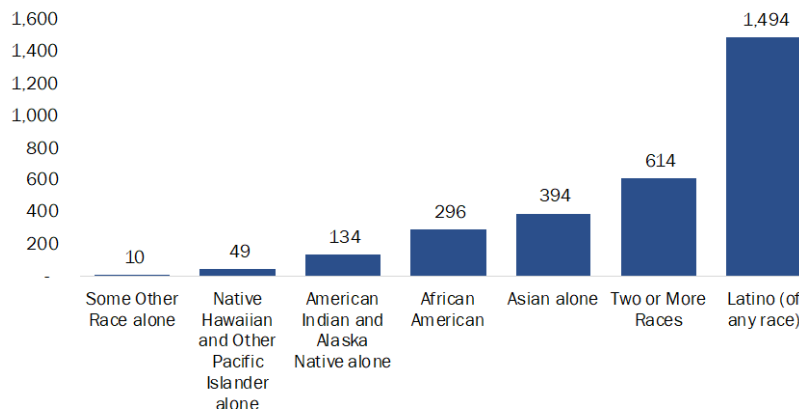
Understanding the race and ethnicity characteristics³¹ in Ashland is important for understanding housing needs because people of color often face discrimination when looking for housing.

About 3,000 people identify as a race or ethnicity other than White, non-Hispanic in Ashland. Nearly 1,500 people identify as Latino.

Not shown in the exhibit are the 18,065 people identifying as White, non-Hispanic in Ashland.

Exhibit 23. Population by Race/Ethnicity, Ashland, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS, Table B03002.

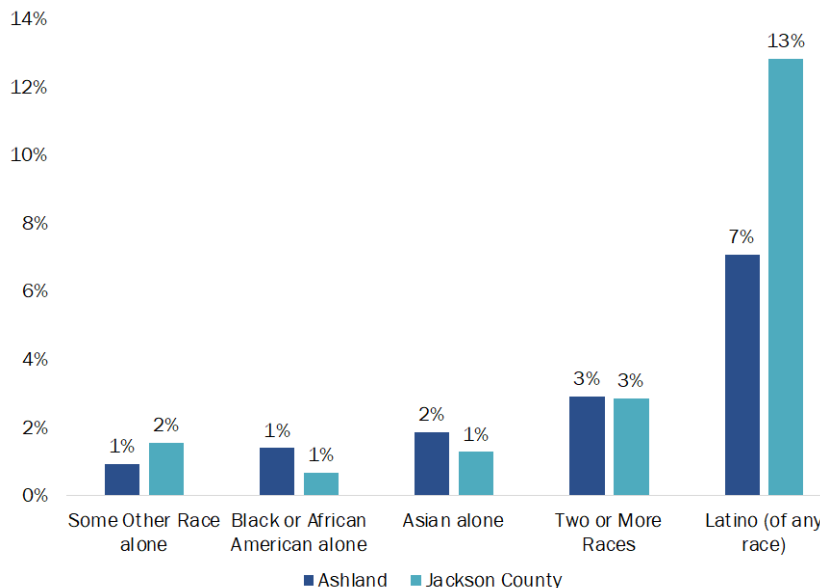


Residents who identify as Latino (of any race) account for 7% of Ashland's population. The largest racial group in Ashland besides White, non-Hispanic are Two or More Races accounting for 3% of Ashland's population.

Not shown in the exhibit, is about 86% of Ashland's population and 81% of the Jackson County's population identifying as White, non-Hispanic.

Exhibit 24. Population Distribution by Race and Ethnicity, Ashland, 2015-2019

Source: 2015-2019 ACS, Table B03002.

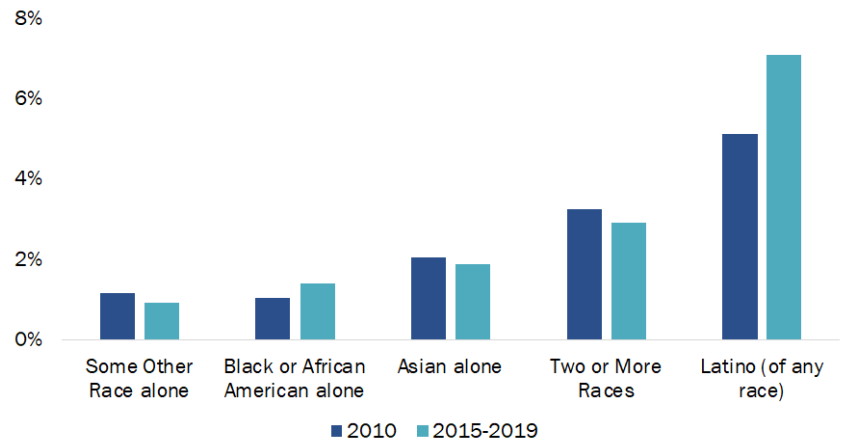


³¹ The U.S. Census Bureau considers race and ethnicity as two distinct concepts. Latino is an ethnicity and not a race, meaning individuals who identify as Latino may be of any race.

The share of Ashland’s households that identified as Latino (of any race) increased from 1,028 people in 2010 to 1,494 people in 2018, consistent with regional trends.

Exhibit 25. Change in Population by Race and Ethnicity as a Percent of the Total Population, Ashland, 2010 and 2015–2019

Source: U.S. Census Bureau, 2010 Decennial Census Table P005001, 2015–2019 ACS Table B03002.



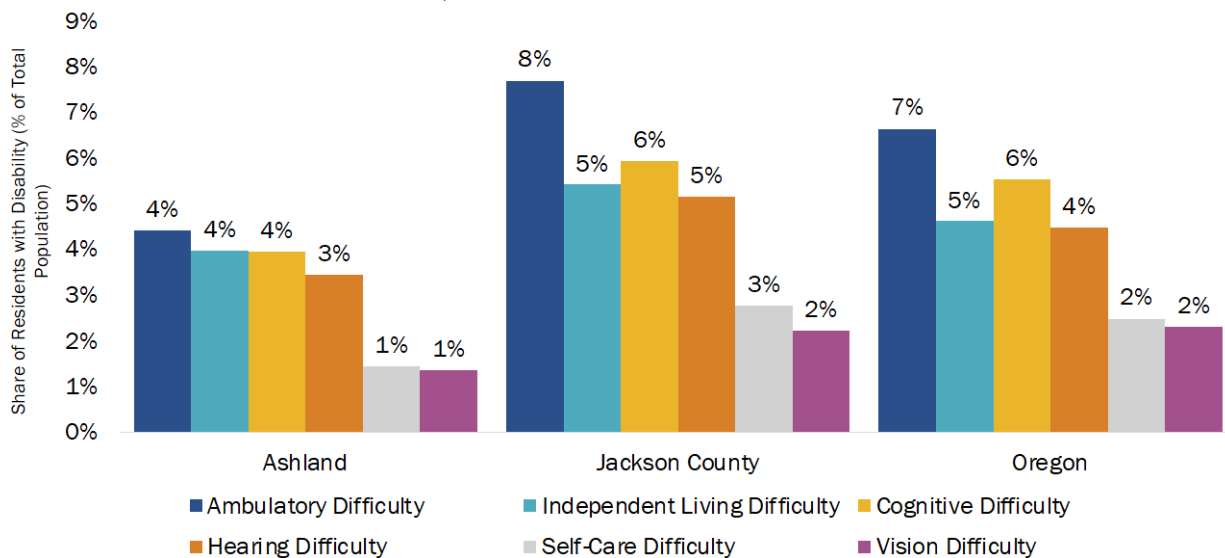
People with a Disability

People with one or more disabilities have special housing needs because they may need housing that is physically accessible, housing that meets the needs of people with cognitive disability, or housing with specialized services.

About 10% of Ashland's population has one or more disabilities (about 2,100 people).

Exhibit 26. Persons Living with a Disability by Type and as a Percent of Total Population, Ashland, Jackson County, Oregon, 2014-2018

Source: U.S. Census Bureau 2014-2018 ACS, Table S1810.



Household Size and Composition

Housing need varies by household size and composition. The housing needs of a single-person household are different than those of a multi-generational family. On average, Ashland's households are smaller than Jackson County's and Oregon's.

Ashland's average household size was smaller than Jackson County's and Oregon's.

Exhibit 27. Average Household Size, Ashland, Jackson County, Oregon, 2014-2018

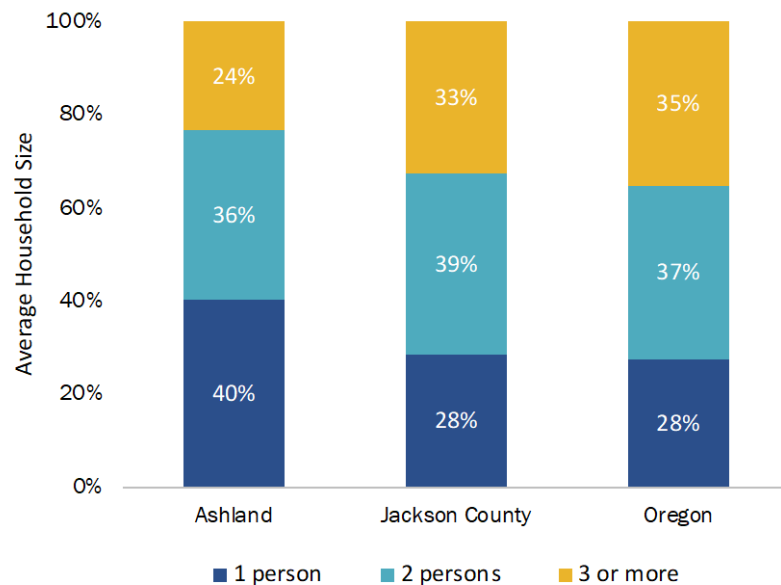
Source: U.S. Census Bureau, 2014-2018 ACS 5-year estimate, Table B25010.

2.06 Persons	2.41 Persons	2.51 Persons
Ashland	Jackson County	Oregon

Ashland had a larger share of one-person households compared to the County and State.

Exhibit 28. Household Size, Ashland, Jackson County, and Oregon, 2014-2018

Source: U.S. Census Bureau, 2014-2018 ACS 5-year estimate, Table B25010.

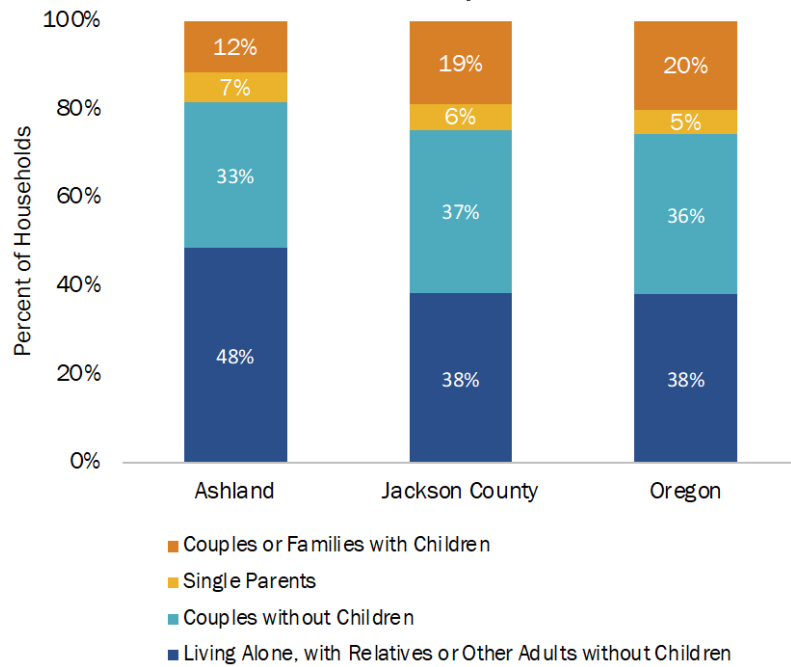


Ashland has a larger share of households with adults only that live alone or with others (non-couples) than Jackson County and Oregon.

About 19% of Ashland's households have children, compared with 25% of Jackson County households and 25% of Oregon households.

Exhibit 29. Household Composition, Ashland, Jackson County, and Oregon, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table DP02.



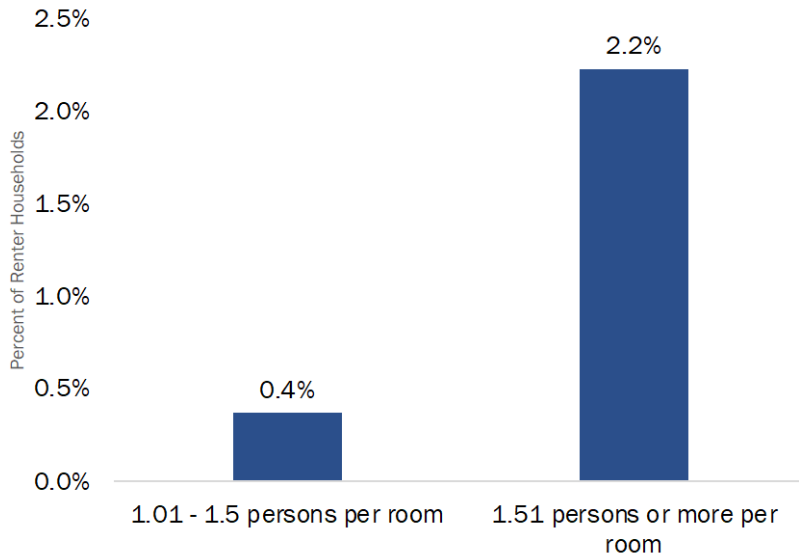
Overcrowding

Overcrowding occurs when the relatively high cost of housing either forces a household to double-up with another household or live in a smaller housing unit to afford food and other basic needs. An overcrowded household is defined by the Census as one with more than one person per room, excluding bathrooms, kitchens, hallways, and porches. Severely overcrowded households are households with more than 1.5 persons per room. Overcrowding can indicate that community does not have adequate supply of affordable housing, especially for larger families.

Approximately 2.6% of all renter households (118 households) in Ashland are overcrowded. No owner households are overcrowded.

Exhibit 30. Overcrowding by Tenure, City of Ashland, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table B25014.



Household Income

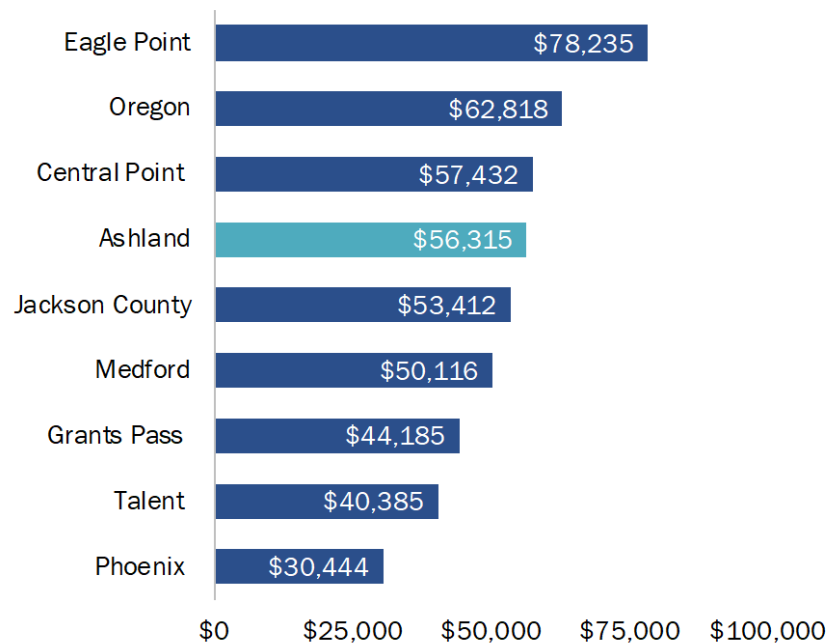
Income is one of the key determinants in housing choice and households' ability to afford housing. Income for residents living in Ashland was slightly lower than the Jackson County median household income and the state's median household income.

Median household income or median earning data is available for many groups of people, as shown in the exhibits below, but is not available by sex at the city level. Median earnings is available by sex for the U.S. as a whole. On average, median earnings for males is \$52,989, compared with \$43,215 for females, \$9,774 less than males' incomes on average.³²

Ashland's median household income (\$56,315) was similar to the county's, but about \$6,500 less than the state's median household income (MHI).

Exhibit 31. Median Household Income, Ashland, Jackson County, Oregon, Comparison Cities, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table B25119.



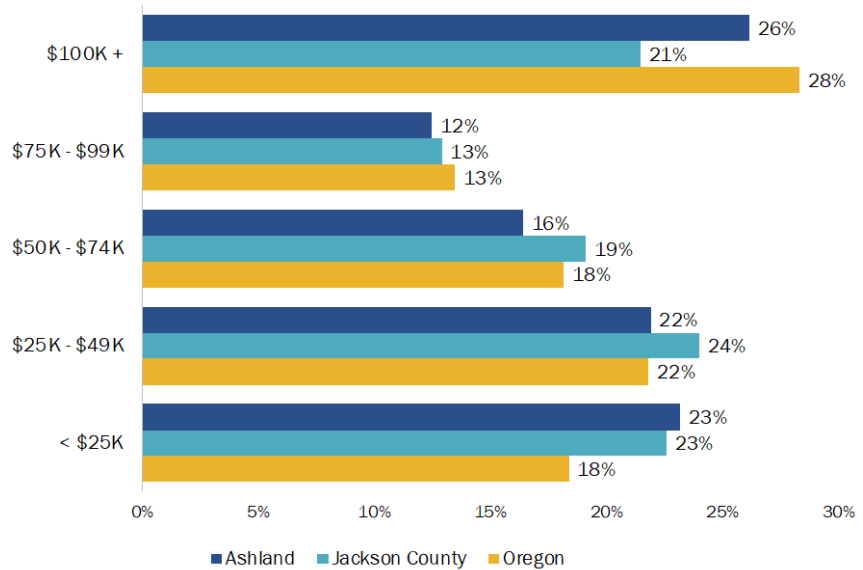
³² U.S. Census Bureau, 2019 ACS 1-year estimate, Table S2002.

45% of all households in Ashland earned less than \$50,000, compared to 47% of Jackson County households, and 40% of Oregon households.

Ashland has more households earning \$75,000+ compared to Jackson County.

Exhibit 32. Household Income Distribution, Ashland, Jackson County, Oregon, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table B19001.

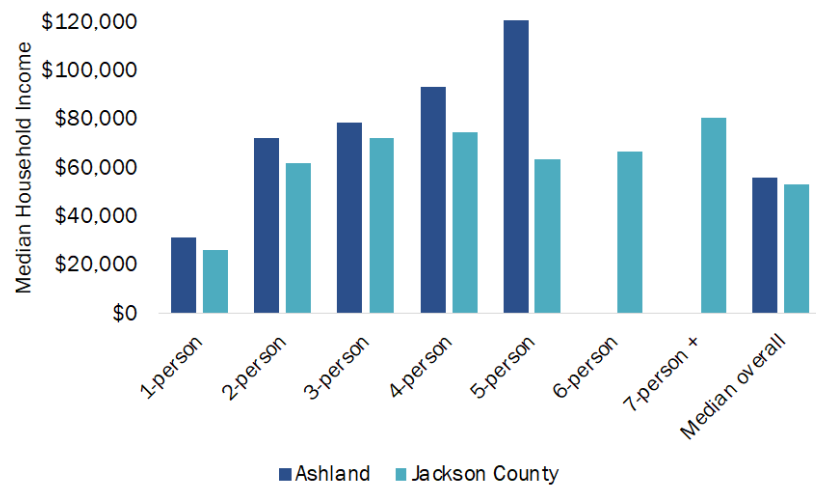


Median household income in Ashland tends to increase with household size and peaks with 5-person households.

Exhibit 33. Median Household Income by Household Size, Ashland, Jackson County, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table B19019

Note: Exhibit 33 displays median household income for households in Ashland, with Jackson County information providing additional context. Data for 6- and 7-person households was not available at the City level.

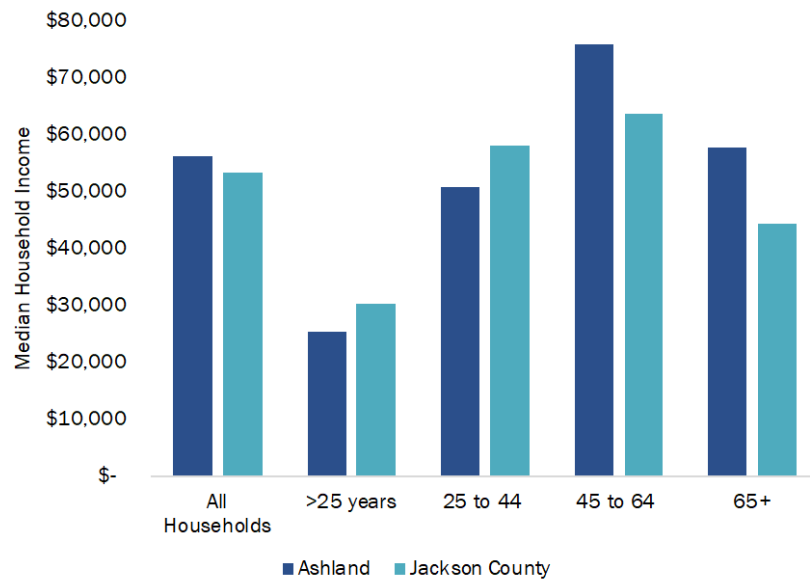


In Ashland, households with a householder under the age of 45 make less than the city median income.

Household income peaks between ages 45 and 65 and declines after age 65.

Exhibit 34. Median Household Income by Age

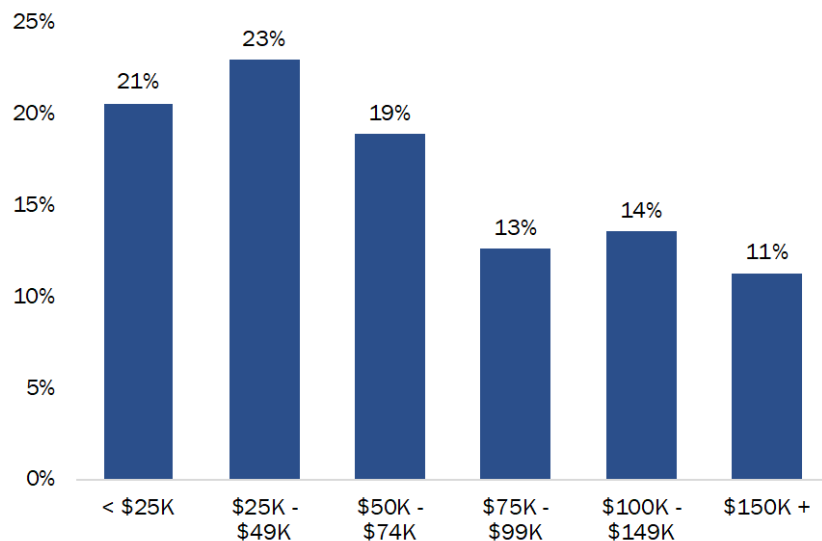
Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table B19049.



Forty-four percent of households with a head of householder aged 65 or older earned less than \$50,000 per year.

Exhibit 35. Household Income Distribution for Householders Aged 65 Years and Older, Ashland, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table B19037.



Latino and some other race alone households had incomes below the City's median.

Exhibit 36. Median Household Income by Race and Ethnicity for the Head of Household, Ashland, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table S1901.

Note: Black/African American, American Indian/Alaska Native, Asian, and two or more races were not included for Ashland due to high margins of error. Black bars denote the potential upper and lower bound of the estimate using the margin of error reported by the Census.

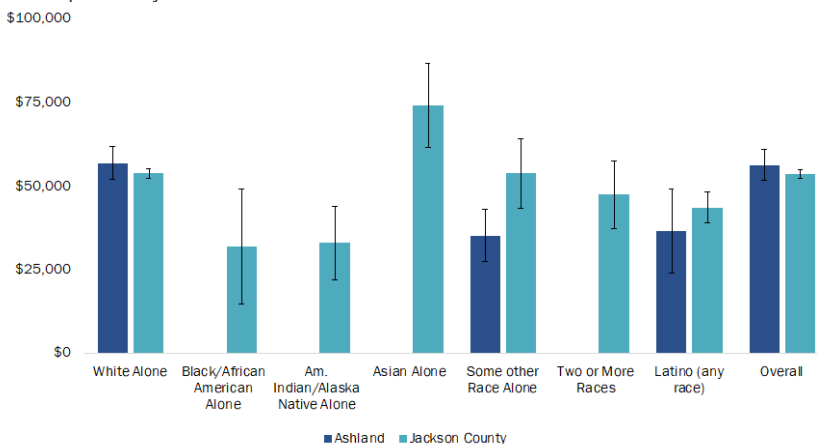


Exhibit 37 to Exhibit 39 compare household income for POC households with White non-Hispanic households to show disparities in come levels. The income levels shown in these graphs are the same used throughout this report:

- Extremely Low Income: Less than 30% MFI
- Very-Low Income: 30% to 50% of MFI
- Low Income: 50% to 80% of MFI
- Middle Income: 80% to 120% of MFI
- High Income: 120% of MFI or more

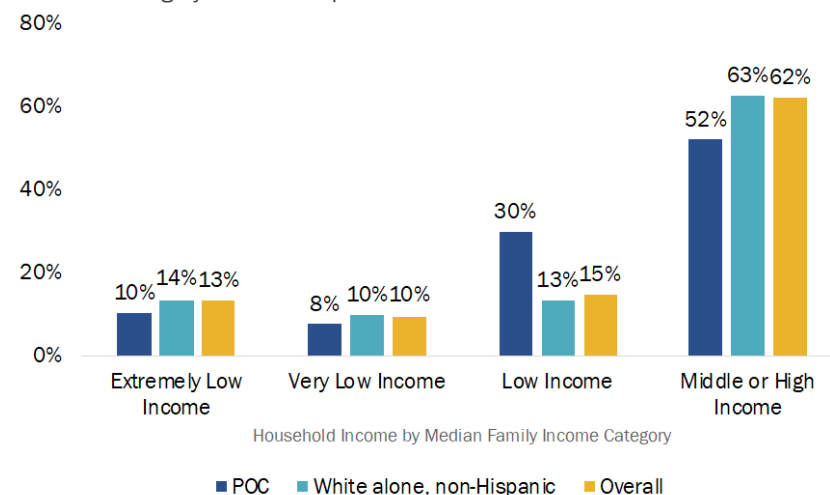
Households headed by a person of color were more likely to be low income than the average household in Ashland.

About 48% of households headed by a person of color had an income below 80% median family income compared to 37% of households with a head of household who identifies as White.

Exhibit 37. Household Income by Income Grouping POC, White non-Hispanic, and All Households, Ashland, 2014-2018

Source: CHAS, Table 2.

Note: POC category includes Hispanic.

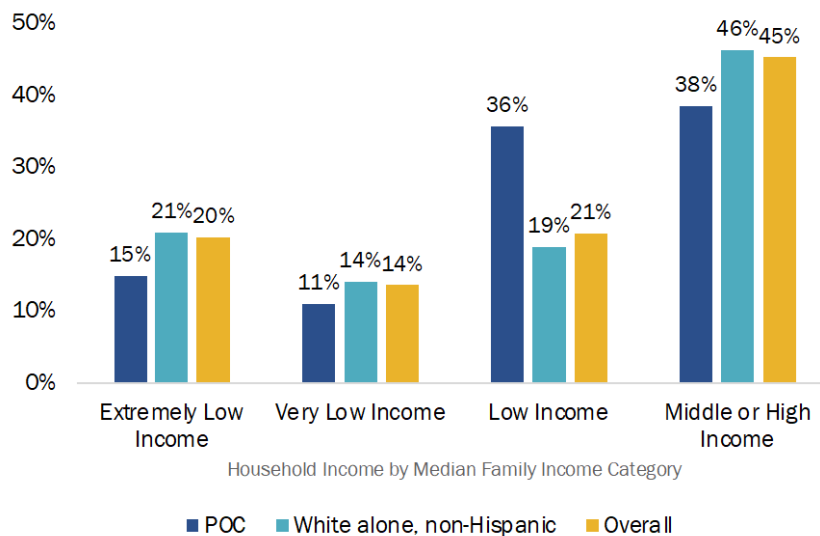


Over 50% of all renter households make below 80% MFI (have low, very low, or extremely low income).

Sixty-two percent of POC renter households are low income compared to 54% of White households.

Exhibit 38. Renter Income by Income Grouping for POC, White non-Hispanic, and All Households, Ashland, 2014-2018

Source: CHAS, Table 2.
Note: POC category includes Hispanic.

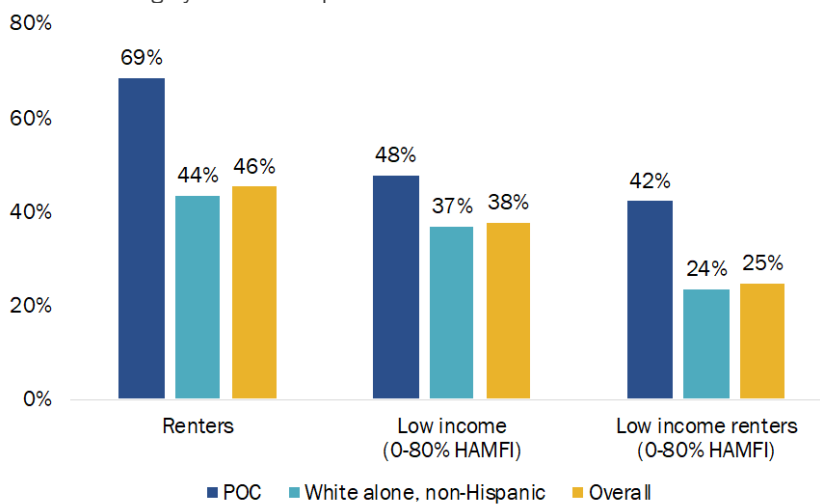


Nearly 70% of POC households are renters compared to 44% of White households.

Over 40% of POC households that rent are low income.

Exhibit 39. Comparison by Tenure and Income POC, White non-Hispanic, and All Households, Ashland, 2014-2018

Source: CHAS, Table 2.
Note: POC category includes Hispanic.



Housing Market Conditions and Trends

An analysis of housing market conditions and trends in Ashland provides insight into the functioning of the local housing market. The housing types used in this analysis are consistent with needed housing types as defined in ORS 197.303:

- **Single-family detached** includes single-family detached units, manufactured homes on lots and in mobile home parks, and accessory dwelling units.
- **Single-family attached** is all structures with a common wall where each dwelling unit occupies a separate lot, such as row houses or townhouses.
- **Multifamily** is all attached structures (e.g., duplexes, tri-plexes, quad-plexes, and structures with five or more units) other than single-family detached units, manufactured units, or single-family attached units. This analysis groups multifamily units into two sub-categories: (1) duplexes, triplexes, and quadplexes and (2) multifamily units in buildings with five or more units per structure.

Existing Housing Stock

According to the 2014-2018 American Community Survey (ACS) from the U.S. Census, Ashland had 10,705 dwelling units, an increase of 1,634 dwelling units from 2000. Most new units built were single-family units.

About 66% of Ashland's housing stock was single-family detached housing.

Ashland had a larger share of multifamily housing than Jackson County.

Exhibit 40. Housing Mix, Ashland, Jackson County, and Oregon, 2014-2018

Source: U.S. Census Bureau, 2014-2018 ACS Table B25024.

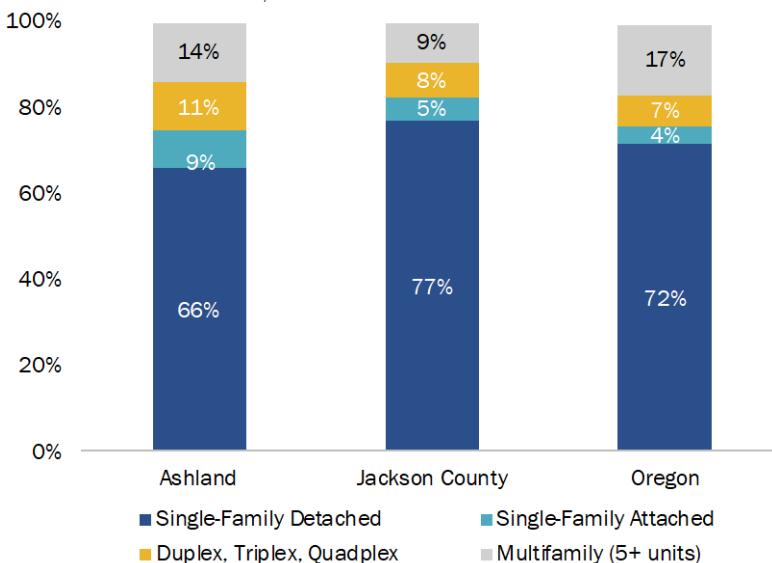


Exhibit 41 shows the types of dwelling units by race and ethnicity in Ashland. It shows that households that identified as Asian Alone were most likely to live in single-family detached housing (78%). Households that identified as Black/African American Alone or Some other Race

Alone were most likely to live in multifamily housing. Of any race, about 41% of the households that identified as Latino lived in single-family detached housing.

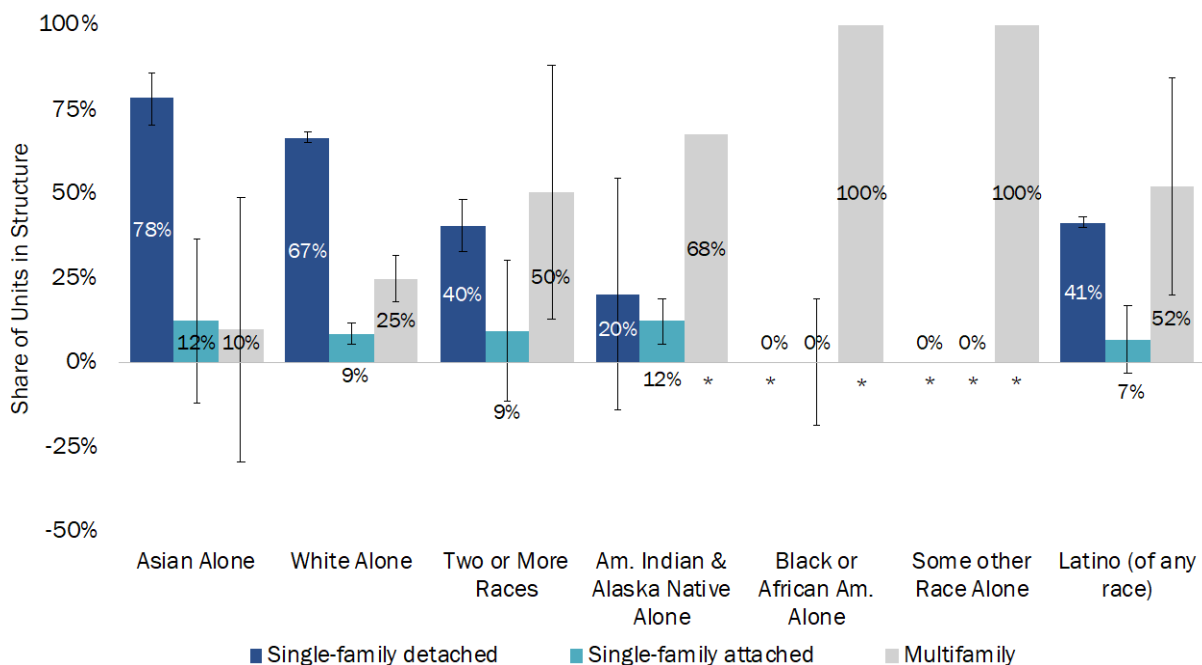
Exhibit 41 includes an indication of margin of error (the “whisker” lines shown in the graph). The number of people of color in Ashland is relatively small. Exhibit 23 shows that groups like Black or American Indian include a small number of people living in Ashland. Exhibit 41 shows a high margin of error in the data for these groups, with either a long “whisker” line or an asterisk (*) to indicate that the margin of error exceeds 50% (indicating high uncertainty about the data).

The take-away point from Exhibit 41 is that some people of color (not including Asians) are more likely to live in multifamily housing than the Ashland average in Exhibit 40, which shows that 14% of households live in multifamily housing.

Exhibit 41. Occupied Housing Structure by Race and Ethnicity, Ashland, 2014-2018

Source: U.S. Census Bureau, 2014-2018 ACS Table B25032 A-I.

Note: Margin of errors marked with an asterisk (*) indicate the value exceeds 50%.



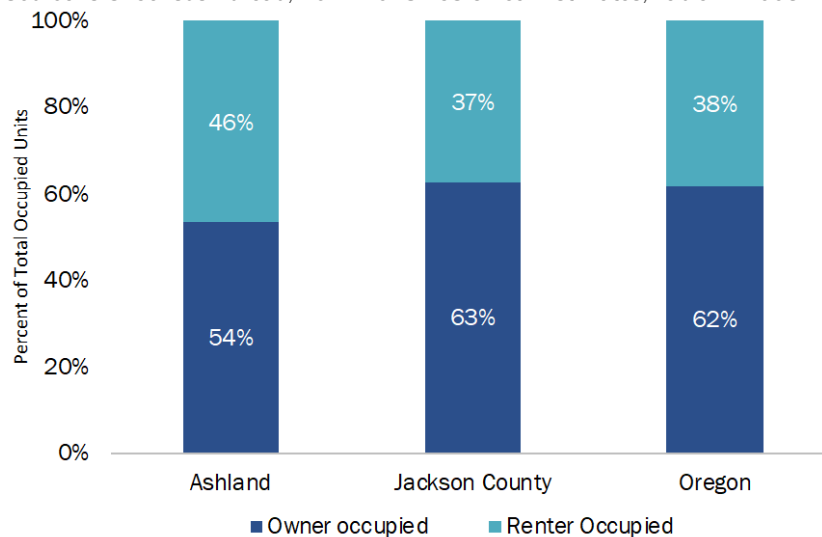
Housing Tenure

Housing tenure describes whether a dwelling is owner- or renter-occupied. In the 2014-2018 period, about 54% of Ashland's housing stock was owner occupied and 46% was renter occupied. Ashland's homeownership rate increased by two percentage points since 2000.

Ashland had a lower homeownership rate than Jackson County and Oregon.

Exhibit 42. Tenure, Occupied Units, Ashland, Jackson County, and Oregon, 2014-2018

Source: U.S. Census Bureau, 2014-2018 ACS 5-Year Estimates, Table B24003.

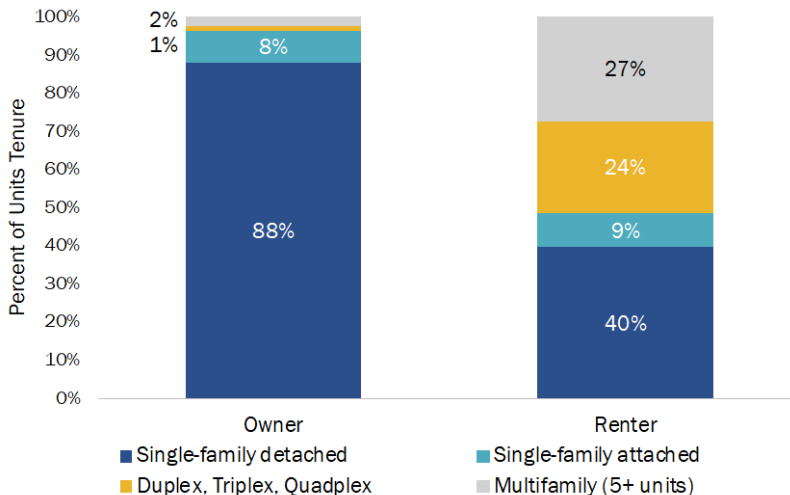


The majority of homeowners (88%) lived in single-family detached housing.

In comparison, less than half of Ashland's renters (40%) lived in single-family detached housing; over half lived in some form of multifamily housing (51%).

Exhibit 43. Housing Units by Type and Tenure, Ashland, 2014-2018

Source: U.S. Census Bureau, 2014-2018 ACS Table B25032.

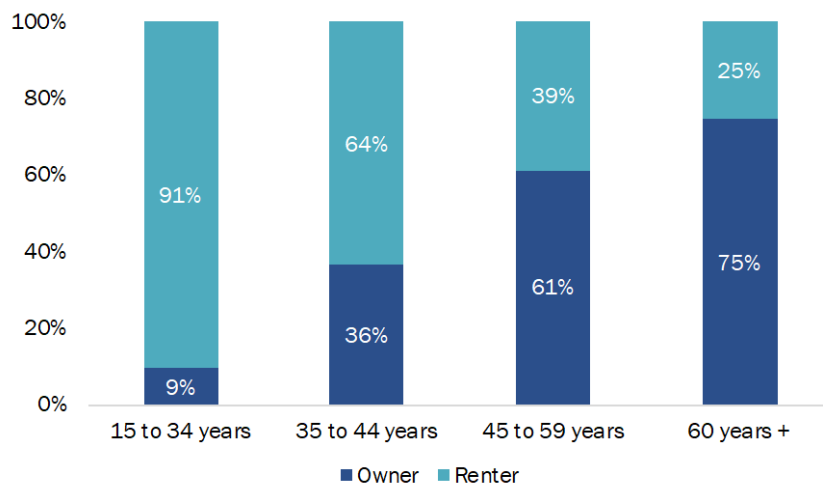


Ashland's homeownership rate increased with the age of the household.

In Ashland, about 75% of householders sixty years of age or older owned their homes.

Exhibit 44. Housing Tenure by Age of the Head of Household, Ashland, 2015-2019

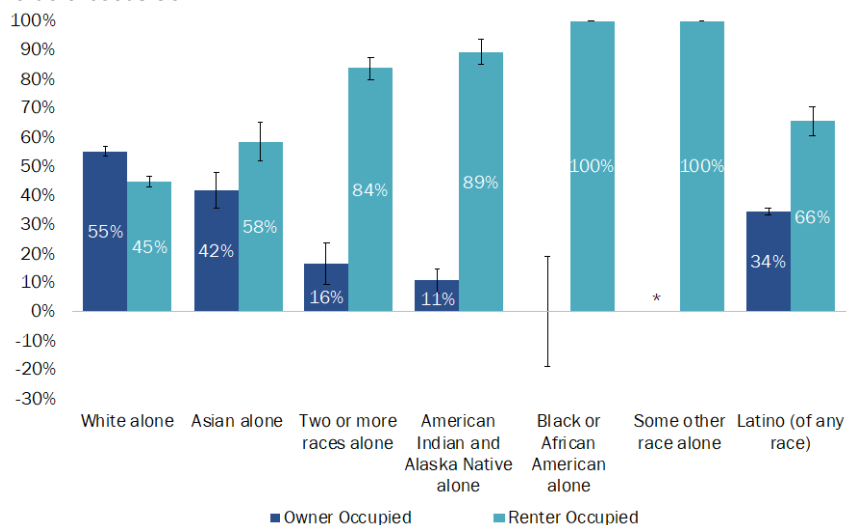
Source: U.S. Census Bureau, 2015-2019 ACS Table B25007.



Households of color are more likely to rent their housing than White households.

Exhibit 45. Tenure by Race and by Ethnicity, Ashland, 2014-2018

Source: U.S. Census Bureau, 2014-2018 ACS Table B25003A-I. Black bars denote the potential upper and lower bound of the estimate using the margin of error reported by the Census. Margin of errors marked with an asterisk (*) indicate the value exceeds 50%.



Rent-Restricted and Emergency Housing

There are 10 government-assisted housing developments in Ashland with a total of 267 dwelling units. Over three quarters of the 267 dwelling units (79%) are units with one- or two-bedrooms. About 26 of Ashland's rent-restricted dwelling units (10%) were larger units with three- or four-bedrooms.

Ashland had approximately 10,705 dwelling units in the 2014-2018 period. Rent-restricted units accounted for about 2.5% of Ashland's total housing stock.

In addition, the following government-assisted housing developments are under development or recently completed in Ashland:

- Snowberry Brook 2, which has 60 units of affordable housing
- Rogue Ridge, which has 30 units of affordable housing

These new developments increase the affordable housing in Ashland by 90 units, bringing the total to 357 units of affordable housing in Ashland.

Exhibit 46. Government-Assisted Housing, Ashland, 2019

Source: Oregon Health and Human Services, Affordable Housing Inventory in Oregon.

Development Name	Total Affordable Units	Studio units	1-bedroom units	2-bedroom units	3-bedroom units
Chestnut Apts	40		8	28	4
Ashley Senior Center Apts	83	29	54		
Bridget Street	4			2	2
Chestnut Apts	4			2	2
Grant Street Apts	2			2	
Hyde Park	6		3	1	2
Parkview Apts	6	2		3	1
Snowberry Brook	60		12	38	10
Star Thistle Apts	11		11		
Stratford Apts	51		17	29	5
Total	267	31	105	105	26

People experiencing homelessness in Ashland have access to 198 emergency shelter beds (84 of which are voucher/seasonal/overflow beds), 272 transitional shelter beds, and 538 permanently supportive housing beds.

Exhibit 47. Facilities and Housing Targeted to Households Experiencing Homelessness in Ashland, 2020

Source: Ashland's 2020-2024 Consolidated Plan.

Population Served	Emergency, Safe Haven, and Transitional Beds		Permanent Supportive Housing Beds
	Emergency Shelter	Transitional Housing	
Households with Adult(s) and Children	57	69	247
Households with Only Adults	116	143	190
Chronically Homeless Households	-	-	68
Veterans	10	58	33
Unaccompanied Youth	15	2	-

Manufactured Homes

Manufactured homes provide a source of affordable housing in Ashland. They provide a form of homeownership that can be made available to low- and moderate-income households. Cities are required to plan for manufactured homes—both on lots and in parks (ORS 197.475-492). Ashland has five manufactured home parks within its UGB. Within these parks, there are a total of 255 spaces (of which 21 spaces were vacant as of November 2020).

Exhibit 11. Inventory of Mobile/Manufactured Home Parks, Ashland UGB, 2020

Source: Oregon Manufactured Dwelling Park Directory.

Community Name	Location	Type	Total Spaces	Vacant Spaces	Comprehensive Plan Designation
Pines Mobile Home & RV	1565 Siskiyou Blvd	Family	52	1	Commercial
Siskiyou Village	2799 Siskiyou Blvd	Family	49	10	Employment
Tolman Creek Park	215 Tolman Creek Rd	Family	38	-	Residential - Suburban
Wingspread	321 Clay St	Family	116	-	Residential - Low Density Multiple Family
Total	-	-	255	21	-

People Experiencing Homelessness

According to HUD's 2021 Annual Homeless Assessment Report (AHAR), across the United States, the number of people experiencing *sheltered* homelessness has been decreasing since 2015, but the drop between 2020 and 2021 was steeper than in recent years.³³ It is likely that some of this decline is due to COVID-related precautions that resulted in fewer beds available (due to the need to have more space between beds). Other factors include people being unwilling to use shelter beds due to health risks as well as eviction moratoria and stimulus payments which may have prevented people from needing emergency shelter.

Pandemic-related disruptions to *unsheltered* homelessness counts made it difficult to determine if this population is increasing or decreasing in communities. Many communities chose not to conduct unsheltered PIT counts due to the risk of increasing COVID-19 transmission. While the communities that conducted unsheltered counts seem to indicate that this population did not increase, trends on unsheltered homelessness are known for only half of communities.

The Oregon Statewide Homelessness Estimates 2021 report from the Oregon Housing and Community Services presented two counts in their report – estimated and reported counts. The estimated counts were developed to address concerns that data limitations imposed by the COVID-19 pandemic resulted in an undercount.³⁴ This report uses the estimated count.

The following exhibits provide more localized estimates of homelessness in Ashland's region.

Jackson County's Point-in-Time Homeless count increased by 31% from 2017 to 2021.

Exhibit 48. Number of Persons Homeless, Jackson County, Point-in-Time Count, 2015, 2019, and 2020

Source: Oregon Housing and Community Services and Annual Homeless Assessment Report (AHAR) data.

Note: OHCS reported two counts in 2021 – estimated and reported counts. This report uses the estimated counts.

633 Persons
2017

712 Persons
2019

831 Persons
2021

³³ The U.S. Department of Housing and Urban Development (2021). The 2021 Annual Homeless Assessment Report (AHAR) to Congress. Office of Community Planning and Development.

³⁴ The *reported* count for sheltered homelessness is what was collected/reported while the *estimated* count is the largest sheltered count reported during 2019-2021 in Jackson County. For unsheltered, the 2021 PIT count is not available for all counties, so the report modeled it by adding the predicted 2019-2021 change, determined through analysis of past trends and other homelessness data, to the 2019 PIT count.

In 2021, an estimated 831 people experienced homelessness in Jackson County, the majority of which were unsheltered.

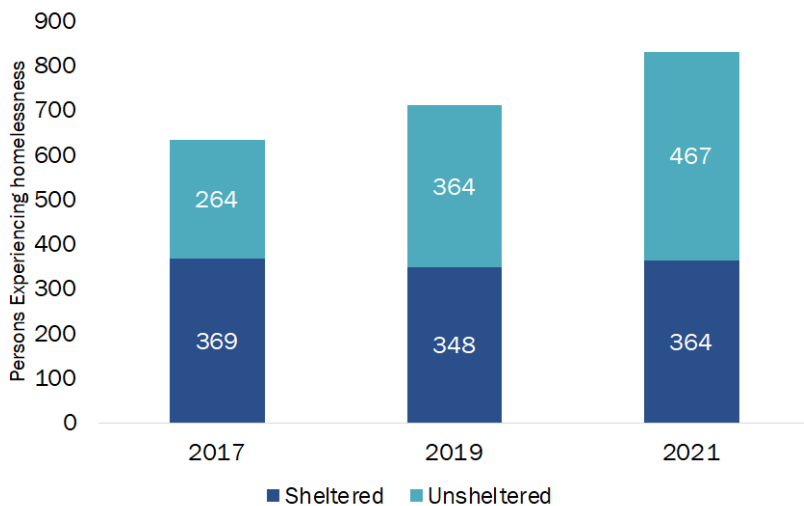
Oregon Housing and Community Services presented two counts in 2021 – estimated and reported counts. The estimated counts were developed to address concerns that data limitations imposed by the COVID-19 pandemic resulted in an undercount. This report uses the estimated count.

About 10% of people experiencing homelessness in Jackson County are in Ashland.

Exhibit 49. Point-in-Time Homelessness Estimates, Ashland, Jackson County CoC, 2017-2021

Source: Oregon Housing and Community Services and Annual Homeless Assessment Report (AHAR) data.

Note: OHCS reported two counts in 2021 – estimated and reported counts. This report uses the estimated counts.

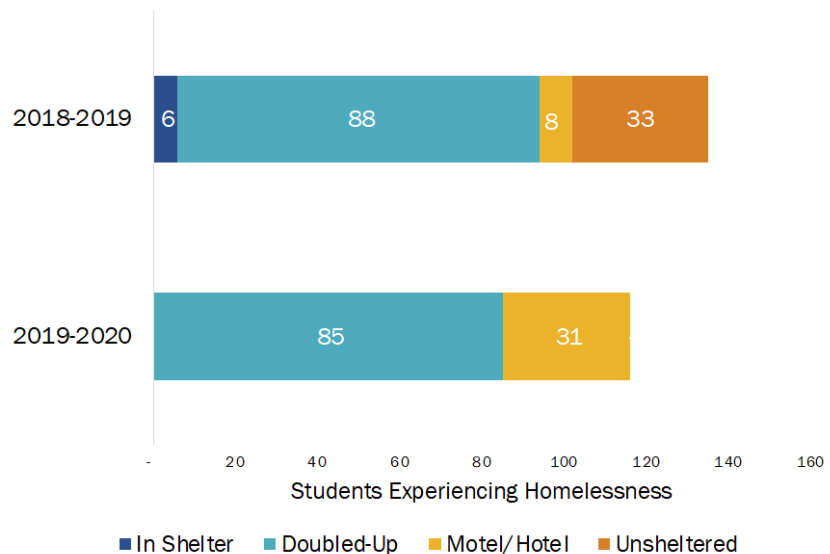


From the 2018-19 school year to the 2019-20 school year, student homelessness decreased from 135 students to 125 students, a decrease of 10 students.

Of the 125 students in 2019-20 experiencing homelessness, 24 were unaccompanied.

Exhibit 50. Students Homeless by Living Situation, Ashland School District, 2018-2019 and 2019-2020

Source: McKinney Vento, Homeless Student Data.



Based on the Oregon's Regional Housing Capacity Analysis, Ashland will need about 310 housing units to accommodate people experiencing homelessness in the 2020-2040 period.

Exhibit 51. Estimate of Future Housing Need for People Experiencing Homelessness, Ashland, 2020 to 2040

Source: From the Report *Implementing a Regional Housing Capacity Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, August 2020.

310 Dwelling Units

New Units Needed for People Experiencing Homelessness (2020-2040)

16 Dwelling Units

Annual Average

Housing Affordability Considerations

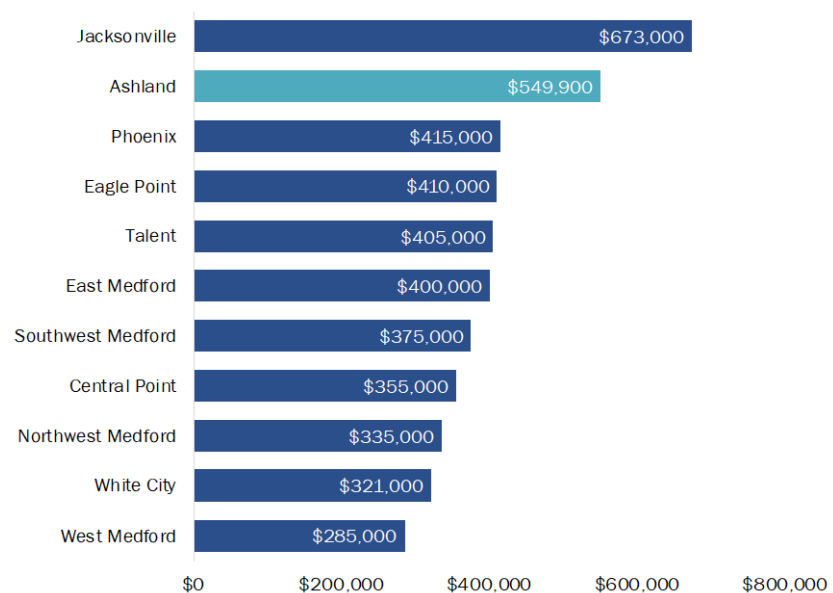
This section describes changes in sales prices, rents, and housing affordability in Ashland and a comparison of geographies. Both housing sale prices and rents have increased steadily in Ashland and the greater region over the last several years.

Housing Sale Prices

Ashland's median home sales price was higher than most other Southern Oregon submarkets.

Exhibit 52. Median Home Sale Price, Ashland and Comparison Cities, November 2021 – January 2022

Source: Southern Oregon Multiple Listing Service.

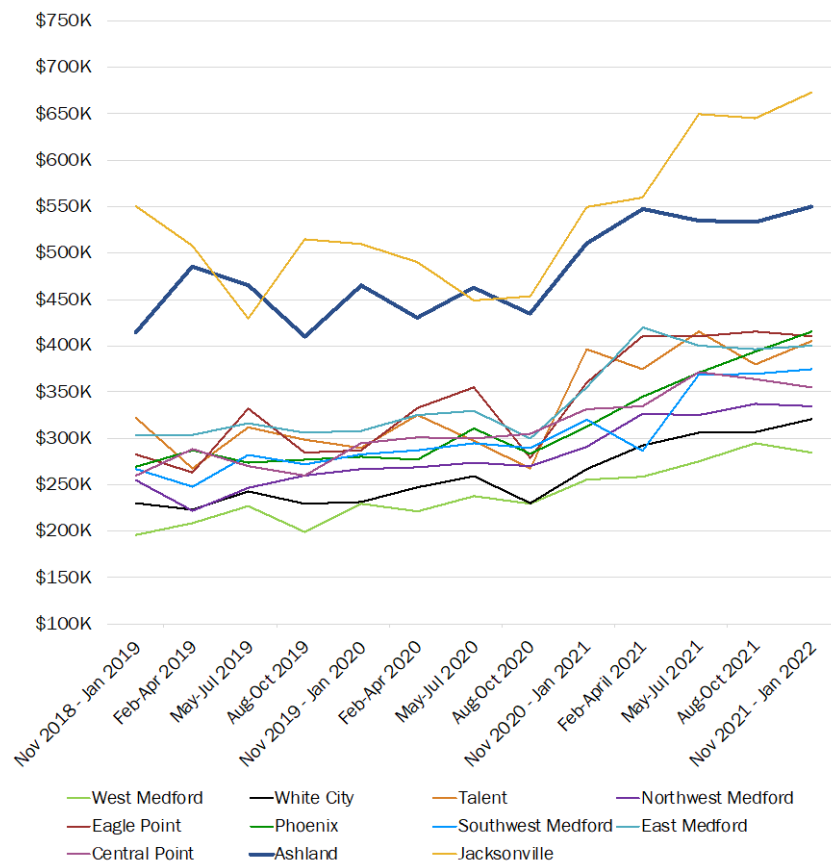


The median price of a home in Ashland increased 33% from \$415,000 in the November 2018 to \$550,000 in November 2021.

Increases in other comparable cities over the same period ranged from \$80,000 (Northwest Medford) to \$146,000 (Phoenix).

Exhibit 53. Median Sales Price, Ashland, and Comparison Cities, 2018 through 2022

Source: Southern Oregon Multiple Listing Service.



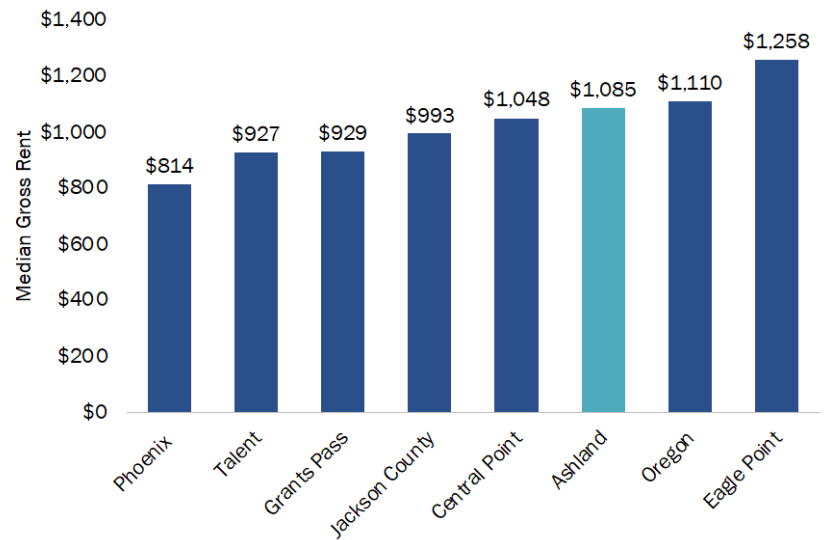
Rental Costs

The median gross rent in Ashland was \$1,085 in the 2015-2019 period, up from \$582 in 2000. However, additional research shows that asking rents for currently available rental properties in Ashland in December 2020 were \$1,145 to \$1,560 for a 2-bedroom unit and \$1,595 to \$1,995 for a 3-bedroom unit.³⁵

According to the 2015-2019 ACS, the median rent in Ashland was similar to the median rent in Jackson County as a whole.

Exhibit 54. Median Gross Rent, Ashland, Jackson County, Oregon, and Comparison Cities, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS 5-year estimate, Table B25064.



³⁵ CMP Real Estate Services, Inc., December 2020.

Housing Cost Burden

Financially attainable housing costs for households across the income spectrum in Jackson County are identified in In Ashland, a household would need to earn \$137,000 to \$157,000 (187% to 215% of MFI for a family of four) to afford the median sales price of a home in Ashland. A household would need to earn about \$62,000 (85% of MFI for a family of four) to afford the median gross rent (\$1,550).

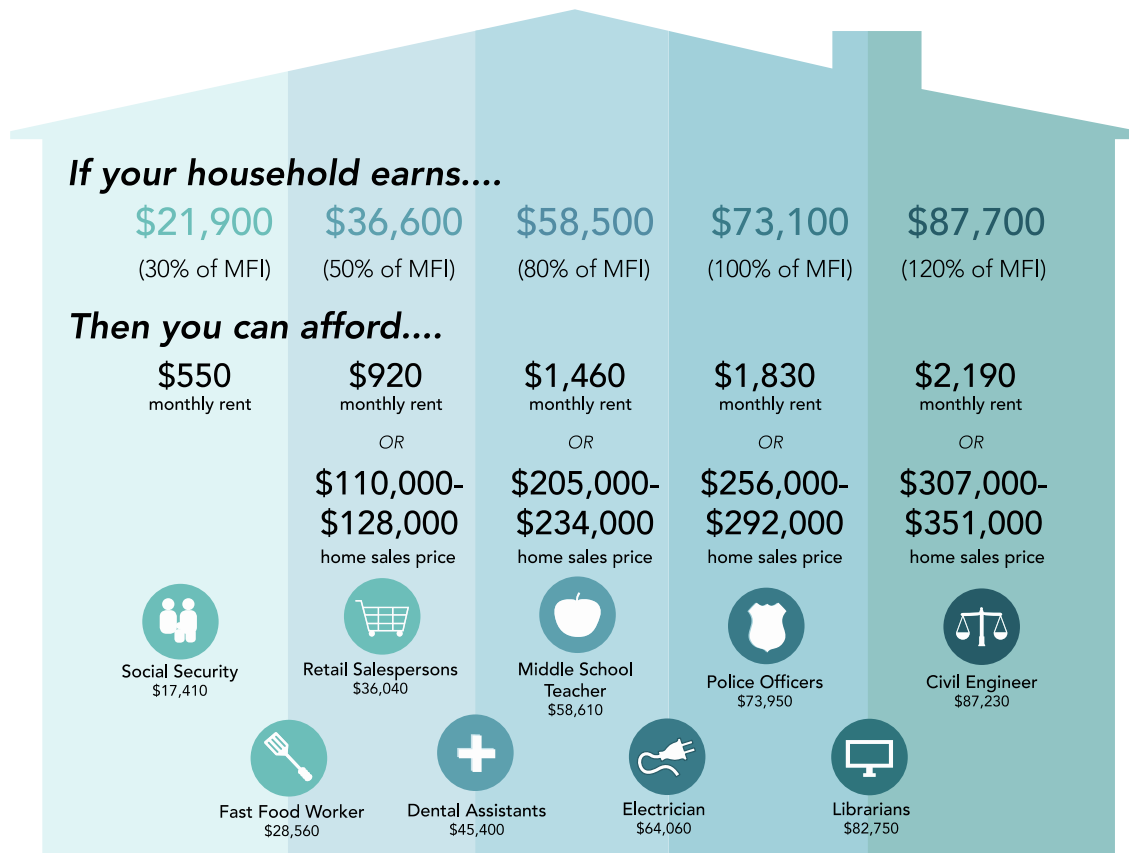
Exhibit 55. For example, a household earning median family income in Jackson County (about \$73,100 per year)³⁶ can afford a monthly rent of about \$1,830 or a home roughly valued between \$256,000 and \$292,000 without cost burdening themselves.

In Ashland, a household would need to earn \$137,000 to \$157,000 (187% to 215% of MFI for a family of four) to afford the median sales price of a home in Ashland. A household would need to earn about \$62,000 (85% of MFI for a family of four) to afford the median gross rent (\$1,550).

³⁶ Note that Median Family Income for the region is different than Median Household Income (MHI) for Ashland (see Exhibit 31). MFI is determined by HUD for each metropolitan area and non-metropolitan county. It is adjusted by family size – in that, 100% MFI is adjusted for a family of four. MHI is a more general term. MHI includes the income of the householder and all other individuals 15 years old and over in the household, whether they are related to the householder or not.

Exhibit 55. Financially Attainable Housing, by Median Family Income (MFI) for Jackson County (\$73,100), Ashland, 2021

Source: U.S. Department of Housing and Urban Development, Jackson County, 2021. Oregon Employment Department.



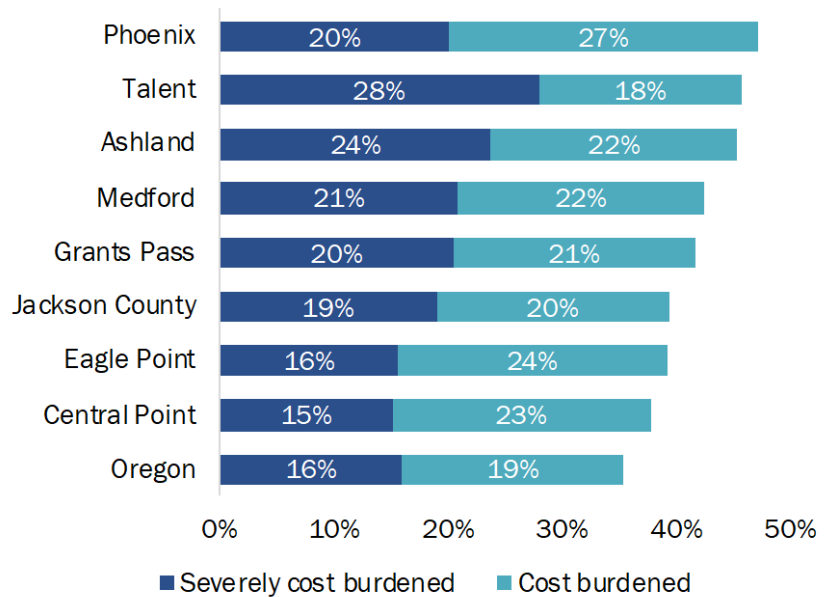
Because the local housing market cannot produce income-restricted, subsidized affordable housing at sufficient levels – and because it cannot often produce middle income/workforce housing without subsidy, many households in Ashland are cost burdened (as Exhibit 56 through Exhibit 61 show). A household is defined as cost burdened if their housing costs exceed 30% of their gross income. A household that spends 50% or more of their gross income on housing costs is said to be severely cost burdened.

Overall, about 46% of all households in Ashland were cost burdened.

Ashland had a higher share of cost burdened households compared to Jackson County and the state.

Exhibit 56. Housing Cost Burden, Ashland, Jackson County, Oregon and Other Comparison Cities, 2014-2018

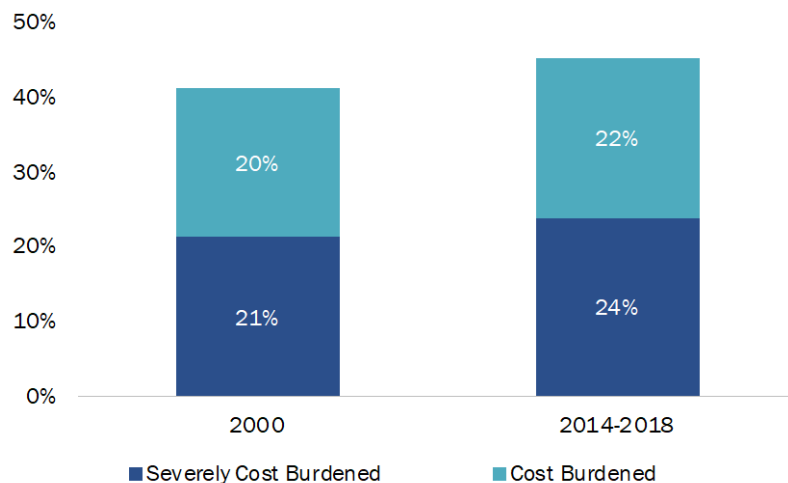
Source: U.S. Census Bureau, 2014-2018 ACS Tables B25091 and B25070.



From 2000 to the 2014-2018 period, the number of cost-burdened and severely cost-burdened households increased slightly.

Exhibit 57. Change in Housing Cost Burden, Ashland, 2000 to 2014-2018

Source: U.S. Census Bureau, 2000 Decennial Census, Tables H069 and H094 and 2014-2018 ACS Tables B25091 and B25070.



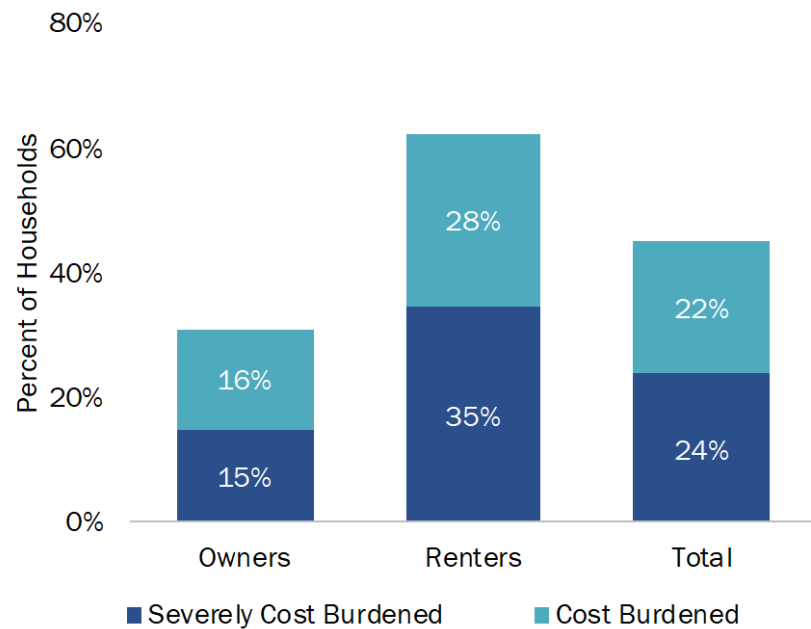
Renters were much more likely to be cost burdened than homeowners in Ashland.

About 63% of Ashland's renters were cost burdened or severely cost burdened, compared to 31% of homeowners.

About 35% of Ashland's renters were severely cost burdened, meaning they paid 50% or more of their gross income on housing costs.

Exhibit 58. Housing Cost Burden by Tenure, Ashland, 2014-2018

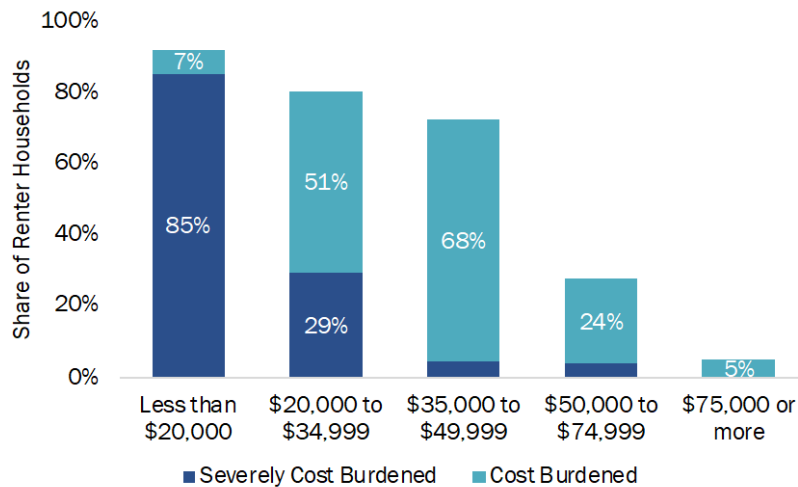
Source: U.S. Census Bureau, 2014-2018 ACS Tables B25091 and B25070.



Most households earning less than \$50k are cost burdened.

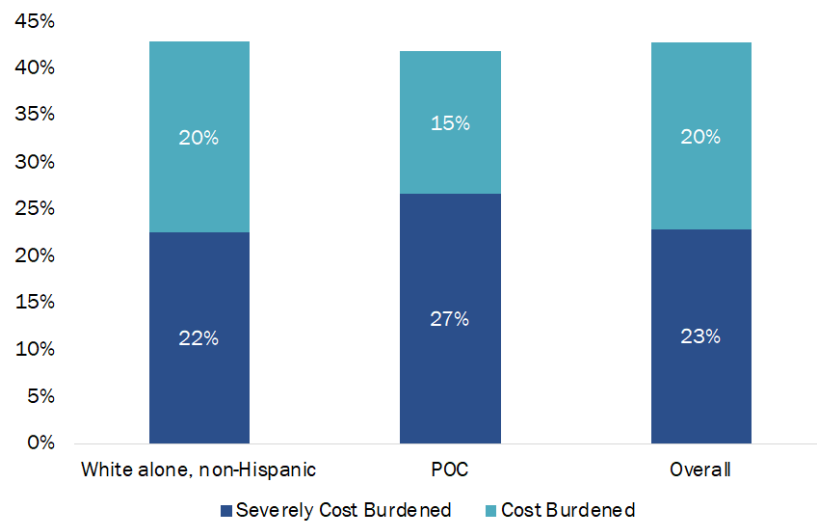
Exhibit 59. Cost Burdened Renter Households, by Household Income, Ashland, 2015-2019

Source: U.S. Census Bureau, 2015-2019 ACS Table B25074.



The difference in rates of cost burden for POC is smaller than in many of Oregon's communities. Part of the reason for this may be the small population of POC in Ashland.

Exhibit 60. Cost Burdened for POC, White non-Hispanic, and All Households, Ashland, 2014-2018
Source: CHAS Table 9.



The difference in rates of cost burden for POC, both as renters and owners, is smaller than in many of Oregon's communities. Part of the reason for this may be the small population of POC in Ashland.

Exhibit 61. Cost Burdened by Tenure for POC, White non-Hispanic, and All Households, Ashland, 2014-2018
Source: CHAS Table 9.

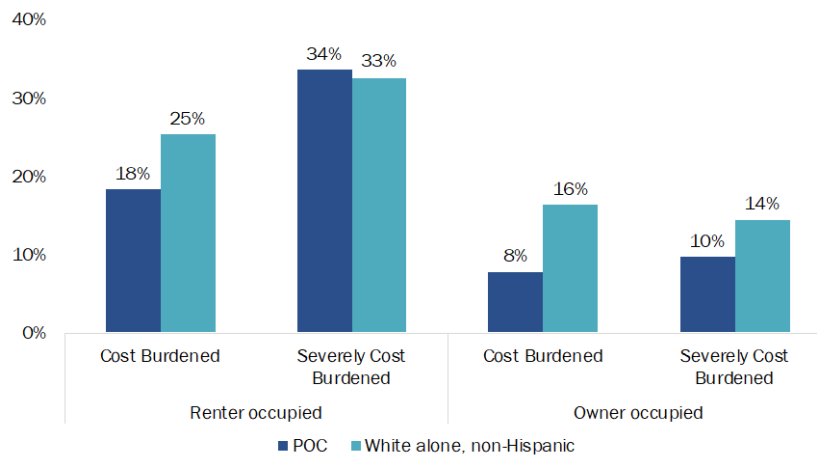


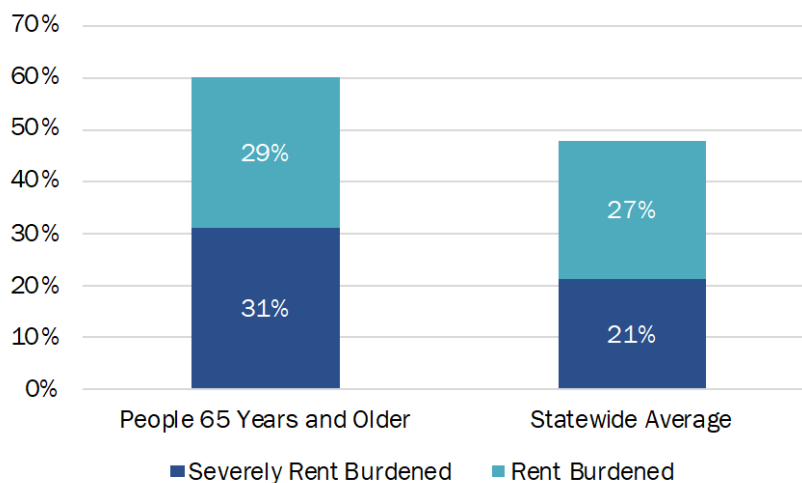
Exhibit 62 to Exhibit 63 show cost burden in Oregon for renter households for seniors, people of color, and people with disabilities.³⁷ This information is not readily available for a city with a population as small as Ashland, which is why we present statewide information. These exhibits show that these groups experience cost burden at higher rates than the overall statewide average.

Renters 65 years of age and older were disproportionately rent burdened compared to the state average.

About 60% of renters aged 65 years and older were rent burdened, compared with the statewide average of 48% of renters.

Exhibit 62. Cost Burdened Renter Households, for People 65 Years of Age and Older, Oregon, 2018

Source: S. Census, 2018 ACS 1-year PUMS Estimates. From the Report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, August 2020.

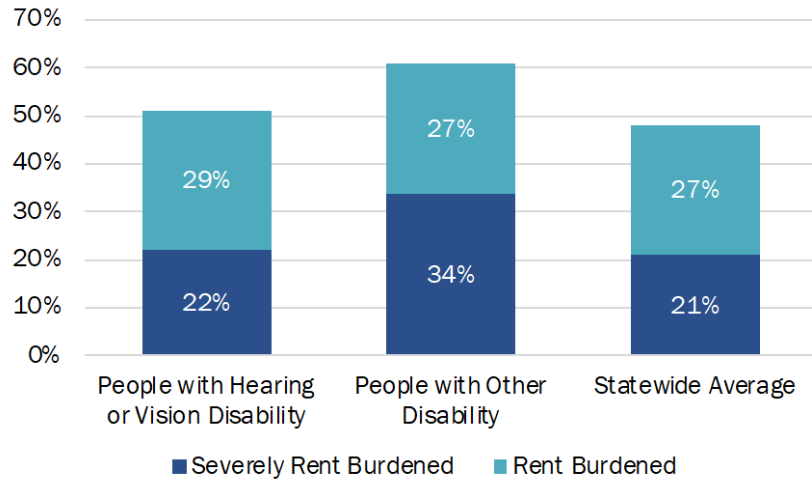


³⁷ From the report *Implementing a Regional Housing Needs Analysis Methodology in Oregon*, prepared for Oregon Housing and Community Services by ECONorthwest, March 2021.

Renters with a disability in Oregon were disproportionately cost burdened.

Exhibit 63. Cost Burdened Renter Households, for People with Disabilities, Oregon, 2018

Source: S. Census, 2018 ACS 1-year PUMS Estimates. From the Report *Implementing a Regional Housing Needs Analysis Methodology in Oregon: Approach, Results, and Initial Recommendations* by ECONorthwest, August 2020.



Findings from Outreach and Engagement

The City has conducted extensive engagement on housing related issues, including targeted outreach to students and low-income households. The full summary of recent engagement and community feedback is included as Appendix D. Based on the comments provided, it appears that off-campus housing in Ashland for SOU students is generally expensive and difficult to find. Many students are struggling to afford housing and are forced to take on multiple jobs or rely on financial aid in order to pay for rent. Some students have resorted to living in hotels or with roommates in order to save money. There is a lack of affordable apartment options in the area, and the high cost of rent often forces students to choose between affording housing or transportation. Some students have also reported being evicted or scammed while searching for housing on websites like Craigslist. Additionally, the feedback received indicates there are a number of unhoused college students in the area who are couch surfing or living in hotels due to the high cost of rent. It is suggested that increasing the supply of housing options in Ashland could potentially lower prices and make housing more affordable for students. Similarly, respondents to community questionnaires administered through an online format, through tabling events, and at the Annual Rent Burden forum, also identified housing price as the most pressing housing issue in Ashland.

Key Terms in the HPS

This appendix presents applicable key terms used in Ashland’s Contextualizing Housing Needs report. Per the Department of Land Conservation and Development, the following key terms will be incorporated into the Definitions section of OAR 660-008 (if they are not already):

- **Consumers of Needed Housing:** any person who inhabits or is anticipated to inhabit Needed Housing, as described in the definition of “Needed Housing” in ORS 197.303.
- **Housing Production Strategy Report:** the report cities must adopt within one year of their deadline to complete an updated Housing Capacity Analysis, pursuant to OAR 660-008-0050.
- **Housing Production Strategy:** a specific tool, action, policy, or measure a city will implement to meet the housing needs described in an adopted Housing Capacity Analysis. A Housing Production Strategy is one component of a Housing Production Strategy Report.
- **Needed Housing:** housing types determined to meet the need shown for housing within an urban growth boundary at particular price ranges and rent levels, including (but not limited to) renter and owner-occupied attached and detached single-family housing, multifamily housing, and manufactured homes.
- **Producers of Needed Housing:** developers, builders, service providers, or other persons or entities providing materials and funding needed to build housing. Producers of Needed Housing may include non-profit organizations or public entities.
- **Unmet Housing Needed:** occurs when housing need determined pursuant to subsection(3)(b) is greater than the housing capacity (i.e., buildable, residential land is insufficient to accommodate demand for housing).

Appendix B: Trends in Gentrification and Displacement Risk

This appendix presents an analysis of trends in gentrification and displacement risk developed for Ashland as part of the HPS.

DATE: July 18, 2022

TO: Brandon Goldman and Linda Reid

FROM: Beth Goodman, Emmanuel Lopez, and Justin Sherrill

SUBJECT: Trends in Gentrification and Displacement Risk in Ashland

As the City of Ashland sets the stage for its Housing Production Strategy, staff are interested in understanding current trends in gentrification and displacement risk in Ashland. The Housing Production Strategy Project Team will use this information to inform potential actions that the City could take to mitigate the risk that the city's most vulnerable populations would be displaced from their housing.

The initial, high-level results of our analysis reveal that:

- **Highway 99 is a dividing line when it comes to socioeconomic vulnerability.** In general, more vulnerable and gentrifying areas are to the north of the highway, and more stable or very late-stage gentrified areas to the south.
- **Most Ashland residents live in neighborhoods that are not currently at risk of gentrification.** Approximately 90% of households live in tracts that are either already gentrified or have remained demographically and economically unchanged since 2010.
- **Ashland has a substantial number of households that are at-risk of displacement and vulnerable, especially in the northern parts of the city.** 39% of Ashland households live in tracts that display high rates of socioeconomically vulnerability and risk of displacement *should gentrification start occurring*, such as people with less than a Bachelor's degree, Hispanic population, and People of Color.

In the following sections, we will examine results and trends in further detail. An overview of the methodologies used in this analysis are within this memorandum.

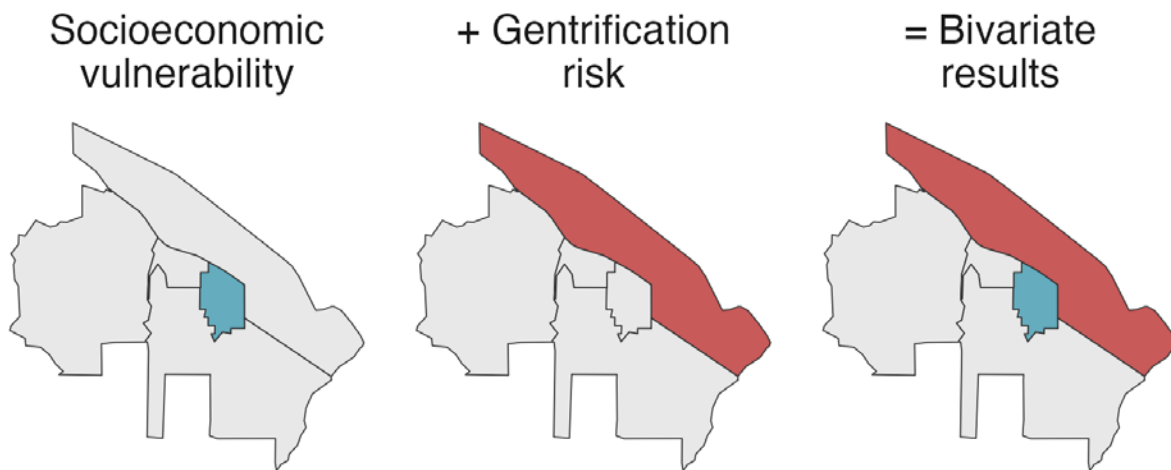
Analysis Methodology

ECONorthwest conducted this analysis by combining two parallel models that look at 1) where the city's most **socioeconomically vulnerable populations** are currently clustered and (2) where **gentrification** has been most rapidly advancing within Ashland since 2010.

Within the **socioeconomic model**, we designed a model that identified the Southwestern Oregon region's most disproportionately cost-burdened demographic groups (such as households with children present or households with people of color, or households with people with a disability) using 2016-2020 ACS PUMS data, then compiled Census tract-level estimates of these demographic groups.

Within the **gentrification model**, we used Dr. Lisa Bates' 2018 gentrification and displacement methodology that the Portland Bureau of Planning and Sustainability (BPS) used for the city of Portland, which identifies areas in different stages of gentrification, from stable (low risk of gentrification) to early-stage gentrification to late-stage gentrification. The data we used was similar to the data Dr. Bates used but shifted over a few years for ease of accessibility, for example: rather than using decennial census, we used American Communities Surveys for the years of 2006-2010, 2011-2015, and 2016-2020. For housing market conditions, we utilized Property Radar data to capture median sale prices within a census tract for the years of 2010 and 2020.

Exhibit 64. Bivariate Analysis Outline



Socioeconomic Vulnerability Methodology

In this part of the analysis, ECONorthwest answers the question, “Who is most likely to be displaced if housing market conditions were to further appreciate in price or stay the same?”

We began with identifying groups that are inequitably burdened by housing costs, meaning that these groups have higher rates of cost burden compared to all households. First, we developed a weighted vulnerability indexing analysis, based on Oregon’s 2019 Public-Use Microdata Survey (PUMS) data at the state level to identify demographic groups that are unequally burdened by housing costs. This means that a given group’s share of the state’s cost-burdened households is greater than its total share of all state households. For example, households with a Hispanic/Latino head comprise 8.6% of the state’s households, but 13.4% of the state’s cost-burdened households – a difference of 4.8% points.

Our analysis identified six demographic groups that were most disproportionately burdened:

- Households with children present
- People of Color (neither White non-Hispanic, nor Hispanic/Latino people are included in this group)
- People of Hispanic/Latino origin, any race
- People five years and older with limited English proficiency (LEP)
- People with one or more disabilities
- People 25 years and older who have an educational attainment of less than a Bachelor’s degree

Disproportionate cost burdening varies across the state. To capture this variation, ECONorthwest compared disproportionate cost burdening among these groups for six geographic areas of the state and compared levels of disproportionate cost burden among the demographic groups for Census tracts in Ashland with state and regional results.³⁸

The result of this analysis is identification of Census tracts with lower and higher percentages of people in vulnerable groups. Census tracts with higher vulnerability levels would indicate places where it is more likely that not only current, but where future housing cost burdening and possible displacement are more likely to occur.

³⁸ ECONorthwest rank-ordered vulnerable demographic groups by six geographic areas of the state. We used the rank (1 through 6) as a weighting factor. Based on this rank-ordered list, we next used tract-level 2019 ACS estimates of all six demographic groups to calculate each tract’s percentage of its region’s total number of vulnerable groups. This share was then converted to decile ranks, and each decile rank was multiplied by the rank-ordered weighting factor. These “scores” were then summed for each tract, with total scores ranging between 21 to 210. Lastly, this score was then divided by the maximum possible value to compute a more intuitive percentage value, with “100%” indicating tracts with the **highest** levels of **all** vulnerable demographic groups.

Gentrification & Displacement Methodology

Gentrification has many definitions such as *“a process of neighborhood change that includes economic change in a historically disinvested neighborhood —by means of real estate investment and new higher-income residents moving in – as well as demographic change – not only in terms of income level, but also in terms of changes in the education level or racial make-up of residents.”*³⁹ This analysis uses the methodology developed by Dr. Lisa Bates at Portland State University in tandem with the City of Portland’s Bureau of Planning and Sustainability (BPS) in their [“2018 Gentrification And Displacement Neighborhood Typology Assessment.”](#)⁴⁰

The analysis identifies Census tracts in Ashland where gentrification is taking place or may take place in the future. These tracts where place-specific ordinances and location-specific research can serve to protect vulnerable populations and determine how much the data matches the lived experience of residents on the ground.

The Gentrification and Displacement Risk Analysis methodology used in this analysis mirrors closely to what BPS and Dr. Lisa Bates utilized in 2018 with an additional typology, explained below.⁴¹ The analysis considers the following characteristics:⁴²

- **Vulnerable populations** are ones with:
 - High rates of renting households relative to the region
 - Large shares of communities of color relative to the region
 - Large shares of adults (25 years and older) without a four-year degree relative to the region

³⁹ Chapple, K., & Thomas, T., and Zuk, M. (2021). Urban Displacement Project website. Berkeley, CA: Urban Displacement Project.

^{**} The Stable – Low Vulnerability typology was developed to show tracts that have historically not had a vulnerable population (between 2010 and 2020) while also experiencing low amounts to no demographic change.

⁴⁰ In previous anti-displacement in gentrification analysis, Dr. Lisa Bates of Portland State University and BPS used a large sample of 168 census tracts (as of 2019 Census Tract estimates) to measure and compare statistics. In this analysis ECONorthwest sought to maintain consistency with the previous methodology. Given that the City of Ashland has just 9 tracts, we used regional level data to calculate the baseline statistics for each of the indicators of gentrification and social vulnerability analysis. We compared Ashland against the regional analysis. The intention behind this was to provide a more robust picture for what the City of Ashland should compare itself to. It would not have been effective to compare the city of Ashland to the city of Medford or Grants Pass, but instead to compare it to the entire region to provide a more accurate depiction of housing market conditions, socioeconomic vulnerability, and other considerations in the analysis.

⁴¹ The methods used by ECONorthwest draw from the work of Dr. Lisa Bates and BPS, but used the observation years of 2010, 2015, and 2020 for both Census and American Communities Surveys years.

⁴² More information about the definitions for the “Vulnerable Population”, “Demographic Change”, and “Housing Market Condition” can all be found in the [2018 report here](#).

- Large shares of low-income households (below 80% Median Family Income) relative to the region
- **Demographic changes** (over the last decade or so) require three of the following four conditions being true or the **two bolded** were true:
 - Share of homeowners increased or decreased slower than the regional average
 - **Share of white population increased or decreased slower than the regional average**
 - **The share of adults with a four-year degree increased faster than the regional average**
 - Median household income increased faster than the regional average
- **Housing market conditions** are Census tracts with the following conditions:
 - **Adjacent tracts:**
 - Had low or moderate 2010 home values/rents
 - Experienced low or moderate 2010-2020 appreciation (or 2015-2020 rental appreciation)
 - Touched the boundary of at least one tract with high 2020 values and/or high 2010 appreciation (or 2010-2020 rental appreciation)
 - **Accelerating tracts:**
 - Had low or moderate 2020 home values/rents
 - Experienced high 2010-2020 appreciation (or 2010-2020 rental appreciation)
 - **Appreciated tracts:**
 - Had low or moderate 2010 home values/rents
 - Had high 2020 home values/rents
 - Experienced high 2010-2020 appreciation

This analysis of change (in populations, demographics, and housing markets) over time is completed at the regional and Census-tract levels, rather than at the household level. A basic limitation of census and ACS data is that they cannot provide longitudinal data on individual households between surveys (e.g., over +10 year spans of time). Whether or not low-income families in Ashland have been displaced from other neighborhoods in that time (tracts labeled Late: Type 1 or Dynamic) requires a much deeper level of analysis and qualitative analysis done by either academics or the City.

Exhibit 65 shows a summary of the typologies used in this analysis. They are:

- **Early-Stage Gentrification.** These tracts have not started to gentrify or show early signs that they could be gentrifying.

- **Susceptible.** These tracts have higher shares of vulnerable populations but have not yet experienced demographic changes. Their housing market sales and rents were low or moderate in costs, but they are adjacent to tracts whose housing costs are already high or are increasing rapidly.
- **Early: Type 1.** These tracts have higher shares of vulnerable populations but have not yet experienced demographic changes. Their housing market is still low or moderate in cost but has experienced high appreciation since 2010.
- **Early: Type 2.** These tracts have higher shares of vulnerable populations but have experienced demographic changes showing the loss of vulnerable populations. Their housing market is low or moderate in costs, but they are adjacent to tracts whose housing costs are already high or are increasing rapidly.
- **Mid-Stage Gentrification.**
 - **Dynamic.** These tracts are currently undergoing gentrification. They have higher shares of vulnerable populations and have experienced demographic changes by losing vulnerable populations. Their housing market is still low or moderate in costs but has experienced high appreciation since 2010.
- **Late-Stage Gentrification.** These tracts have mostly gentrified but vulnerable populations may still reside in there. The housing market has completely shifted from low or moderate to high housing costs.
 - **Late: Type 1.** These tracts have higher shares of vulnerable populations but have experienced demographic changes by losing vulnerable populations proportionally. Their housing market used to be low or moderate in 2010 but has appreciated rapidly since, and now values are high.
 - **Late: Type 2.** These tracts no longer have high shares of vulnerable populations like they used to in 2010. They have experienced demographic changes by losing their once-high share of vulnerable populations. Their housing market is still low or moderate but has experienced high appreciation since 2010.
 - **Continued loss .** These tracts no longer have high shares of vulnerable populations like they used to in 2010 or in 2015. The share of white people is growing and/or the share of people with a four-year degree is growing. Their housing market used to be low or moderate in 2010 but has appreciated rapidly since, and now values are high.
- **Stable Low-Vulnerability Communities.** These tracts are ones that have had historically low levels of vulnerable populations relative to the region (from 2010-2020).

Exhibit 65. Gentrification/Displacement Methodology

Typology	Vulnerable Population?	Demographic Change?	Housing Market Condition
Early-Stage Gentrification			
Susceptible	Yes	No	Adjacent
Early: Type 1	Yes	No	Accelerating
Early: Type 2	Yes	Yes	Adjacent
Mid-Stage Gentrification			
Dynamic	Yes	Yes	Accelerating
Late-Stage Gentrification			
Late: Type 1	Yes	Yes	Appreciated
Late: Type 2	Used to be in 2010 or 2015	Yes	Accelerating
Continued Loss	Used to be in 2010 or 2015	Increasing share of white people and adults with bachelor's degree	Appreciated
Stable - Low Vulnerability **	No	No	Any**

What neighborhoods are at most risk of gentrification and displacement?

The most at-risk neighborhoods are in the central east areas of Ashland, while the more stable, low-risk neighborhoods makeup the rest.

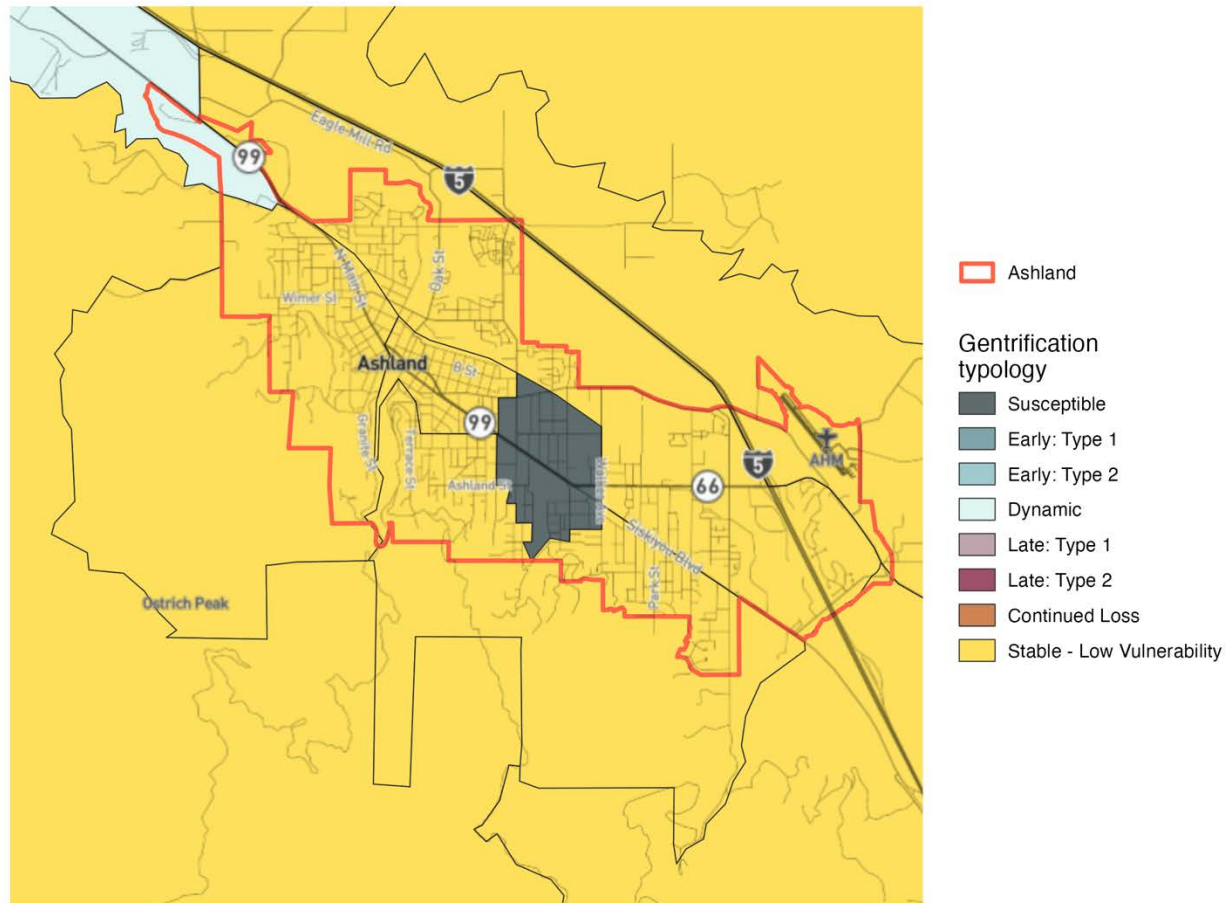
The majority of households (~90%) live in Census tracts that are stable and not showing recent signs of gentrification, while around 10% are in susceptible areas (see Exhibit 67).

Only one tract in Ashland can be considered Susceptible (see Exhibit 66). Central Ashland (along the junction of Highway 99 and West of the Highway 66) have a census tract that is considered Susceptible to gentrification, meaning that it has a high share of economically vulnerable households while also being around census tracts that have had high rates of home sale appreciation or rent appreciation.

Exhibit 66 shows Ashland's gentrification typology by census tract.

Exhibit 66. Gentrification Typology by Tract

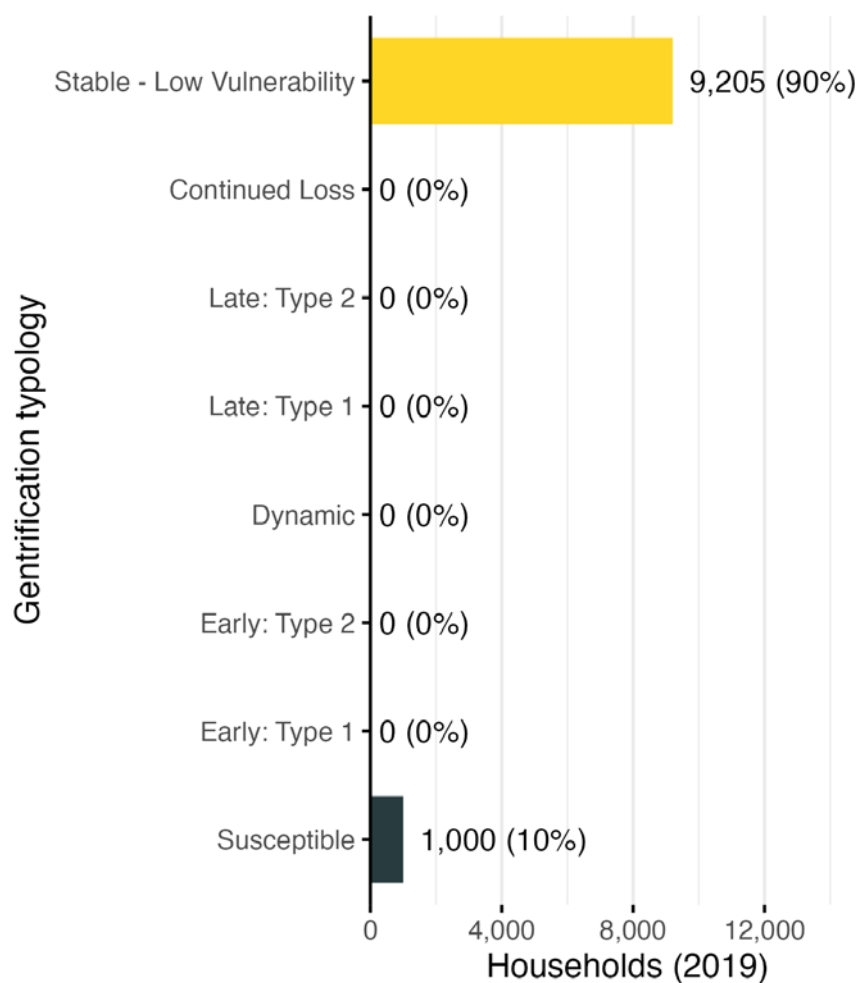
Source: ACS 2010, 2015, 2019 (5-year), RLIS, ECONorthwest, Bates/BPS



About 10% in Ashland live in one tract that is classified as in the **Susceptible** stages of gentrification, as shown in Exhibit 67. While this does not necessarily indicate that 10% of *all households* are at risk of gentrification, it indicates that the majority of Ashland shows signs of housing stability relative to its surrounding region. The tract in Ashland's northwest corner does contain a few dozen houses close to Highway 99, but the majority of this tract is within Talent and has therefore been omitted from our summary tables.

Exhibit 67. Total Ashland Households by Tract Gentrification Typology

Source: ACS 2010, 2015, 2019 (5-year), RLIS, ECONorthwest



Neighborhood-Level Observations Results

Gentrification can be quite a nuanced topic. While the data presents one story about an entire census tract, Ashland's neighborhoods that are in the process of being gentrified may be a much smaller portion of that Census tract.

For Ashland, one tract falls under the definition of **Susceptible**. This typology is characterized by having high levels of economic vulnerability, low rates of demographic change, and having nearby tracts (called "adjacent" tracts) becoming more valuable (rents and/or sale prices appreciating quickly) between 2010 and 2020. This tract is one where the City may want to focus active monitoring to make sure that residents who are already cost-burdened are not forced to leave due to gentrification. Given that a portion of this tract is taken up by Southern Oregon University, this area is likely to have a high student concentration, both in dorms and student housing, as well as other households in Ashland.

Most tracts in and around Ashland are classified as **Stable – Low Vulnerability**. This typology is characterized by low levels of economic vulnerability, little to no recent demographic change, and a housing market that has already appreciated or has stayed relatively flat in the last 10 years.

Where do Ashland's most vulnerable residents live?

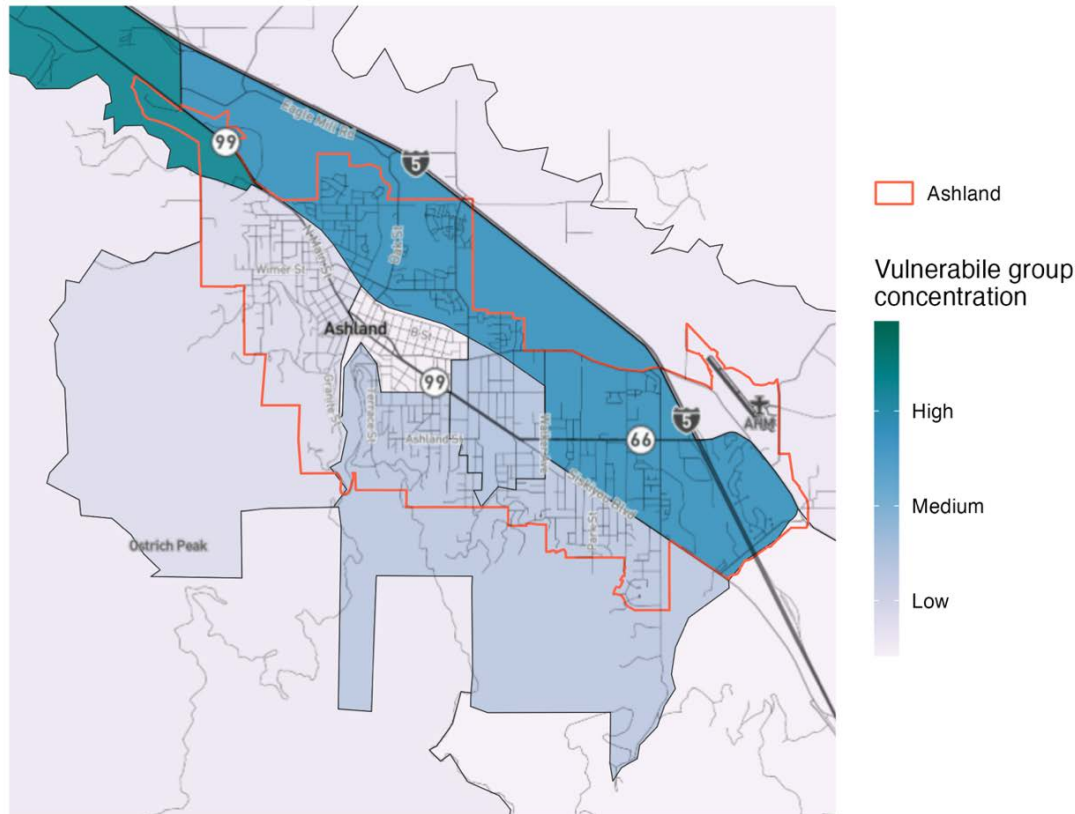
While the previous section provides information on how tracts in Ashland have or have not gentrified, based in part on the Dr. Bates/BPS methodology, this does not answer the question of which neighborhoods and demographic groups are most disproportionately burdened by housing costs. To address this issue, ECONorthwest developed a separate model (described on page 124) using ACS/census datasets to determine which tracts in Ashland are most acutely and unequally burdened by housing prices – the implication being that, should trends hold, the most burdened households today will likely be the first to be displaced tomorrow.

Tracts showing the highest levels of vulnerability are mainly clustered around Ashland's northern boundary.

Exhibit 68 shows the results of the Socioeconomic Vulnerability model. These “high-vulnerability” tracts contain the combined largest shares of the region’s most disproportionately cost burdened demographic groups, such as people without a bachelor’s degree or higher, people of color, and people living with one or more disabilities. Low-vulnerability tracts in Ashland are mostly found in the south and central areas of the city. Ashland’s most vulnerable tract is one that spans along the north side of Highway 99, but the demographic groups that could be impacted by rising housing prices can be found across Ashland.

Exhibit 68. Overall Socioeconomic Vulnerability by Tract

Source: ACS 2010, 2015, 2019 (5-year), RLIS, ECONorthwest



Who is most likely to be displaced if housing market conditions continue to appreciate or stay the same?

Some interesting trends include a noticeable clustering of all demographic groups along Ashland's northeastern boundary, along with a higher POC, LEP, and Hispanic household shares in Ashland's central east neighborhood area. Exhibit 69 shows the results of our Socioeconomic Vulnerability analysis, broken out by each demographic group examined.

Across the state of Oregon, having less than a Bachelor's degree was the strongest determinant of cost-burdened households. Ashland's largest vulnerable group is Less than a Bachelor's degree as well, though this group can also include relatively more financially secure elder or retired residents.

Exhibit 69. Vulnerable Group Concentration by Tract

Source: ACS 2010, 2015, 2019 (5-year), RLIS, ECONorthwest

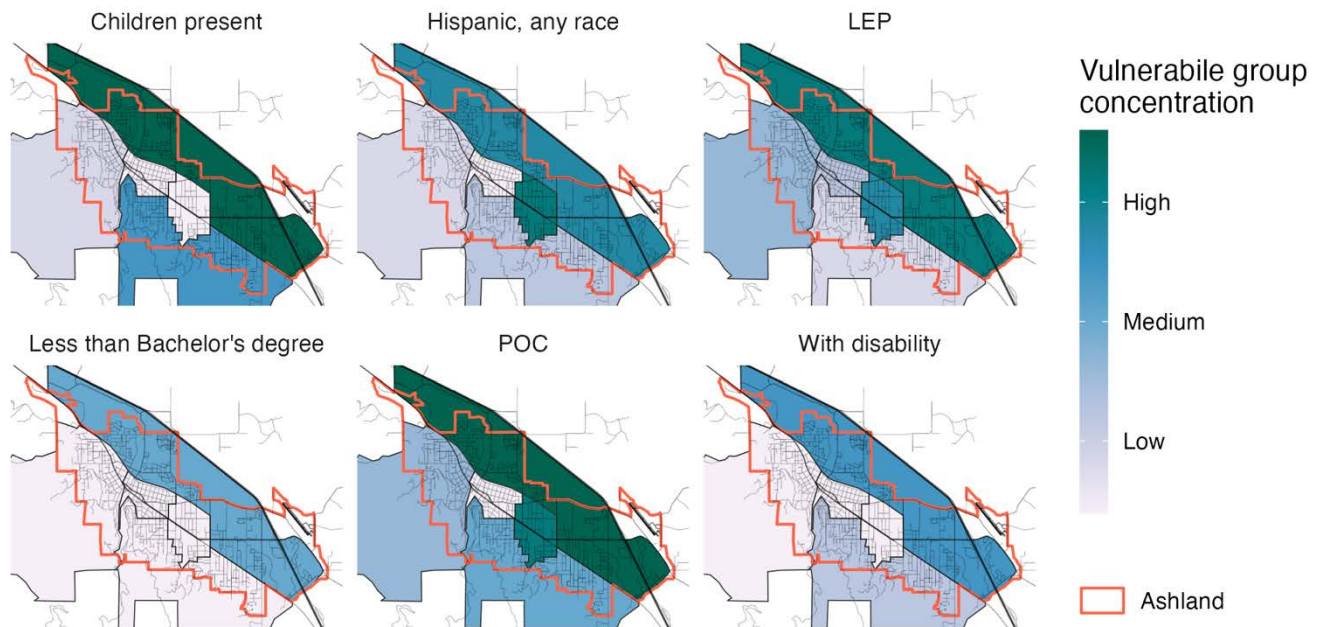


Exhibit 70 depicts the combined Socioeconomic Vulnerability model results in terms of number of households that reside in tracts with intersecting gentrification typologies and socioeconomic vulnerability groupings. For instance, we find that the most common intersection of our model are the 5,651 people living in Stable – Low Vulnerability tracts and having an educational attainment of less than a bachelor’s degree. These demographic groups are not mutually exclusive, so many households would be counted in multiple groups (i.e., a POC individual with a disability would be counted twice).

Exhibit 70. Estimated Households or Population by Vulnerability Group and Gentrification Typology
Source: ACS 2010, 2015, 2019 (5-year), RLIS, ECONorthwest

Gentrification Typology	Stable - Low Vulnerability	1,774	1,005	100	5,651	1,102	1,730
	Continued Loss	0	0	0	0	0	0
	Late: Type 2	0	0	0	0	0	0
	Late: Type 1	0	0	0	0	0	0
	Dynamic	0	0	0	0	0	0
	Early: Type 2	0	0	0	0	0	0
	Early: Type 1	0	0	0	0	0	0
	Susceptible	149	563	51	842	419	130
		Children present (Households)	Hispanic, any race (Population)	LEP (Population)	Less than Bachelor's degree (Population)	POC (Population)	With disability (Population)
		Vulnerable Group					

Most socioeconomically vulnerable residents in Ashland are in the “Less than Bachelor’s Degree” group, which falls in line with high degrees of housing cost-burdening across the state of Oregon. This sub-group is the most common within Ashland’s **Susceptible** tract,⁴³ followed by Hispanic and POC residents. In Ashland’s **Stable – Low Vulnerability** tracts, residents with less than a Bachelor’s degree are again the most common, followed by households with children present and people living with one or more disabilities.

⁴³ This tract contains Southern Oregon University and a high concentration of college students in university housing.

Where do areas with higher gentrification risk and vulnerable populations intersect?

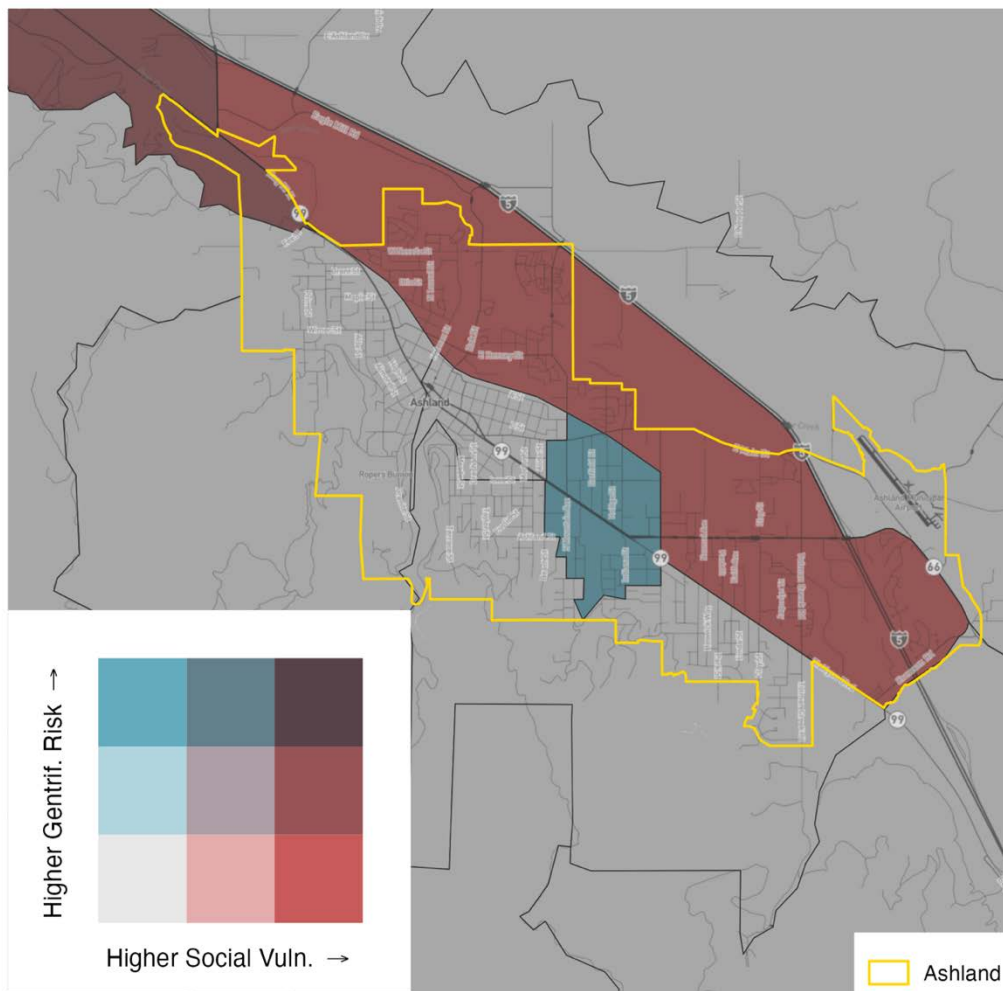
Highway 99 is a dividing line when it comes to gentrification and vulnerability.

Ashland, along with portions of nearby Talent, contain significant amounts of the region's most vulnerable tracts when considering displacement risk, but only one tract in Ashland has been classified as Susceptible to gentrification. Interestingly, our model does not show an intersection between gentrifying and more socioeconomically vulnerable tracts in Ashland.

Exhibit 71 shows areas with higher gentrification risk and areas with higher social vulnerability.

Exhibit 71. Composite Gentrification & Socioeconomic Vulnerability Risk, by Tract

Source: ACS 2010, 2015, 2019 (5-year), RLIS, ECONorthwest



Indicators of **higher gentrification risk** include:

- high shares of low-income households,
- changing socioeconomic demographics as compared to the region
- rising prices of housing for sales and rent

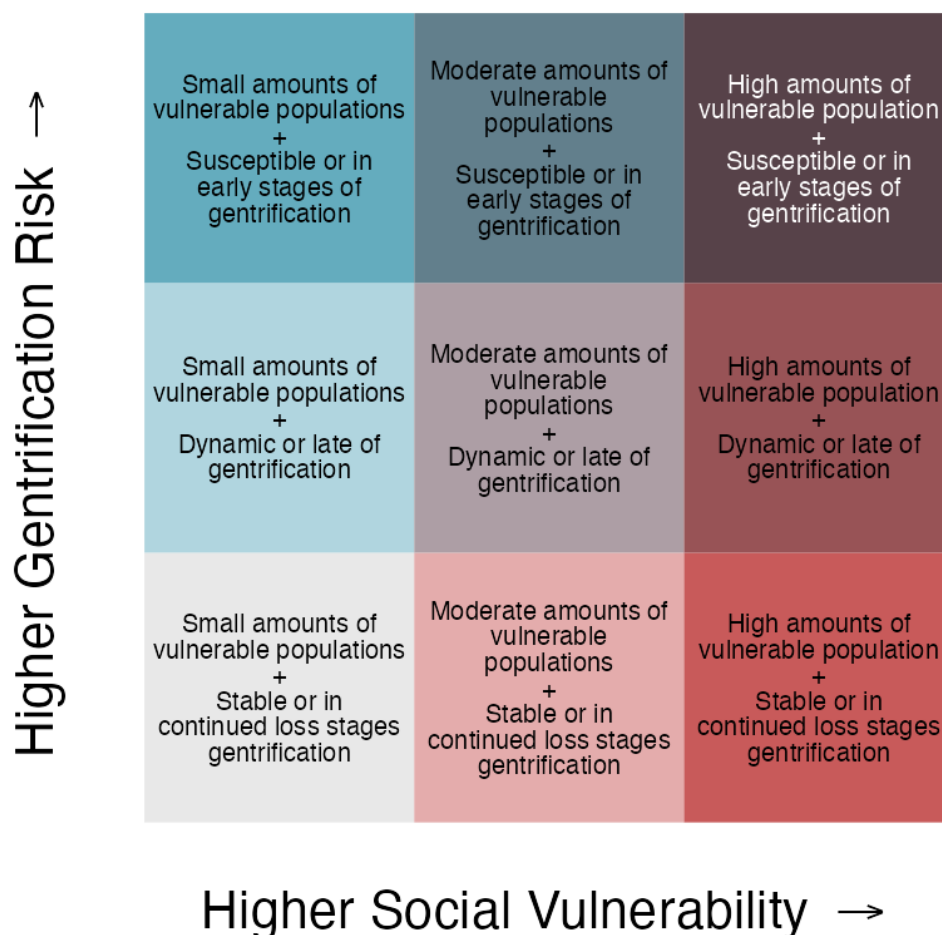
Indicators of **higher social vulnerability** include:

- higher shares of the region's POC or Hispanic population
- higher shares of the region's population without a bachelor's degree or higher

Exhibit 72 provides more context about the risk for gentrification and the level of social vulnerability in Exhibit 71. The following describes the gentrification risk and social vulnerability at each corner of the matrix in Exhibit 72.

- **Top row, left side – in blue.** These areas are at risk of displacing existing populations but the populations in these areas are generally less vulnerable as compared to the region. This may also indicate that neighborhoods nearby are experiencing appreciations in home sales and rents.
- **Top row, left side – in dark grey.** These areas are the highest risk of displacement of existing vulnerable population, such as lower-income households, people of color, Latino households, or other vulnerable populations.
- **Bottom row, left side – in light grey.** These are areas with little risk of displacement and few vulnerable populations.
- **Bottom row, right side – in pink.** These areas have little existing risk of displacement but are home to vulnerable populations.

Exhibit 72. Gentrification & Socioeconomic Vulnerability Risk Matrix



Most Ashland residents live in neighborhoods that are not currently at risk of gentrification

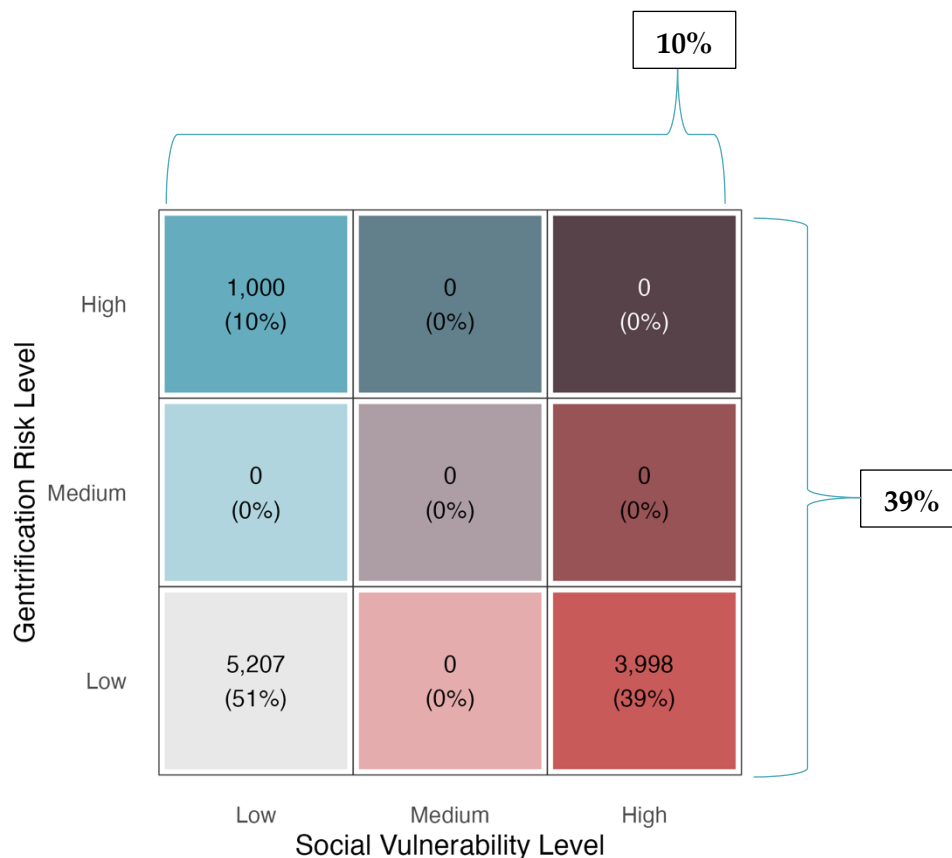
Just over half (51%) of Ashland residents live in Census tracts that combine a low gentrification risk and a low socioeconomic vulnerability level.

Exhibit 73 shows a more simplified version of the percentage of population in Ashland in each of the groupings shown in Exhibit 71 and Exhibit 72.

- 10% of Ashland households reside within a tract identified as at high risk of gentrification (either in early or susceptible stages), but this same tract does not display high rates of socioeconomic vulnerability according to our model.
- 39% of households reside in tracts identified as at high socioeconomic risk of housing displacement, but low risk of gentrification.

Exhibit 73. Ashland Households Within Composite Gentrification & Socioeconomic Vulnerability Tracts

Source: ACS 2010, 2015, 2019 (5-year), RLIS, ECONorthwest



Implications and Next Steps for the Housing Production Strategy

This analysis shows that one central area of Ashland is in early stages of gentrification or at-risk of gentrification. As neighborhoods that were once low-income begin to appear as appealing to new residents, it is important to recognize that the people living in those neighborhoods may not have the same economic opportunities as the people moving in.

For the City of Ashland to validate what is happening on the ground, it is important to consider neighborhood characteristics and design community charettes to accurately represent what change looks like to the residents there now. Ashland may want to take steps to further understand potential for gentrification and potential displacement of vulnerable population, such as conducting additional research about areas at risk for gentrification to better understand the demographic characteristics of people who may be displaced.

The HPS may include actions to preserve existing affordable housing, stabilize households, and prevent future displacement and gentrification.

Appendix C. Housing Developer Interview Summaries

This appendix summarizes the interviews conducted as part of the Housing Production Strategy with stakeholders in the Ashland development community.

DATE: September 12th, 2022

TO: Brandon Goldman, Linda Reid, City of Ashland

FROM: Kaitlin La Bonte, Mackenzie Visser, ECONorthwest

SUBJECT: Summary of Developer Interviews

Purpose of Interviews

ECONorthwest collected input from stakeholders in Ashland, including developers, builders, planners, and architects. The goal of these meetings was to collect feedback on potential strategies and get insight into development barriers in Ashland. Five interviews were conducted over the course of August, 2022.

Interview Structure

Interviews were conducted in a semi-structured interview style, where conversations included the following topics and questions:

Barriers to development:

- What are the biggest challenges to development in Ashland?
- Are there specific barriers to housing development you've encountered in the development code?
- Are there specific barriers to housing development you've encountered in the review process?

Initiatives proposed in the HPS, including:

- Encourage development of low- and moderate-income affordable rental housing.
- Increase opportunities for affordable homeownership.
- Encourage development of income-restricted affordable housing units.
- Preserve existing of low- and moderate-income affordable housing.

Potential strategies, including:

- Increasing development capacity of MFR dwellings through changes to the Land Use Ordinance.
- Disallowing SFD in High Density R-3 Zone.
- Implementing the Multiple Unit Property Tax Exemption (MUPTE) to support multifamily or affordable housing.
- Exploring the potential of Inclusionary Zoning.
- Establishing a Construction Excise Tax.
- Evaluating using Urban Renewal.

Stakeholder Interviews Summary

Key feedback and themes from the stakeholder interviews are summarized in the table below:

Themes	Stakeholder Feedback
Barriers to Development	
Stakeholders agreed that the cost of land in Ashland was a major driver of development costs.	▪ There is a shortage of available land to develop on in Ashland, pushing up land prices. ▪ The price of land is a major barrier to development in the City, leading to increased housing costs. ▪ Existing land can be difficult to build on due to slope, solar ordinances, wetlands, and other factors.
Some administrative processes create barriers to development.	▪ The pre-application waiting period can be a barrier to development. An expedited permitting process for experienced developers could shorten the development process by several months. ▪ Increased communications between City departments (such as engineering, permitting, etc.) could facilitate the application process. ▪ Planning Commission procedures, such as reviewing planning decisions only once a month and delaying adoption of findings until a second hearing, add substantial time to review procedures. ▪ Additional City staff could facilitate development by expediting review times, helping developers navigate the code, and providing other supports.

Themes	Stakeholder Feedback
Decreasing SDCs could incentivize development in Ashland.	- Stakeholders felt that SDCs were a barrier to providing affordable, workforce, and multifamily housing. - Respondents believed that SDC fees and permit fees are more expensive than neighboring jurisdictions, which may deter development in Ashland.
Parking requirements	Parking minimums add to development costs.
Certain code requirements create de facto density limitations.	- Two stakeholders cited the Solar Ordinance as a requirement that limits buildable area on a site. - One stakeholder mentioned that driveway spacing requirements as a barrier to density. - Other limitations on density that stakeholders cited included tree preservation requirements, stormwater retention facility requirements, requirements for gravel barriers around houses, and the lot coverage limitations in woodland zones.
Certain code requirements create confusing and unpredictable review processes.	Stakeholders cited the annexation process, the solar ordinance, the modified flood zone, and street standard requirements as challenges to navigating Ashland's development code.
Feedback on Initiatives	
Stakeholders agreed that housing costs were too high for many Ashland households.	- Stakeholders generally agreed that building more affordable and workforce housing is an important priority for the City. - Stakeholders generally supported increasing density and vertical development in Ashland, but recognized the difficulties associated with doing so.
Stakeholders gave mixed feedback on the City's performance.	- Two stakeholders expressed they would like the City to use more of the zoning and urban planning tools at its disposal. - Two stakeholders expressed that they were satisfied with the work the City is doing, especially compared to neighboring jurisdictions.
Feedback on Strategies	
Urban Renewal	Two stakeholders were engaged with Urban Renewal efforts in other jurisdictions and reported that it was helpful in facilitating development.

Themes	Stakeholder Feedback
	Another stakeholder was not confident that Urban Renewal would be successful in Ashland and felt the City should focus more on other strategies.
ADUs	- Under current conditions, ADUs are generally not feasible to develop as rental units, as high development and materials costs require higher revenues to pencil. - Requirements for separate water meters, sewer, power, and storm systems for ADUs drive up costs. - Reducing SDCs based on size could encourage ADU development.
Annexation	- Two stakeholders mentioned the Grant Terrace project and felt it was a positive development for Ashland, though noted the challenges involved in the annexation process. - Multiple stakeholders felt easing the annexation process could increase the amount of buildable land in Ashland, lowering costs. - Some stakeholders felt the City should annex additional land to increase development, rather than increasing density.
Increasing development capacity of MFR dwellings through changes to the Land Use Ordinance	- Two stakeholders felt increasing lot coverage allowances would support development. - Two stakeholders doubted whether this strategy would have much of an impact because there is not sufficient demand for higher density MF developments
Land banking	One builder expressed interest in building more workforce housing if they could do so feasibly and would be interested in partnering with the City if the city had land available.

Stakeholder Recommendations

To promote housing development	- Evaluate opportunities to streamline development review. - Increase Cottage Housing SF allowances to 850 feet. The 800 SF maximum limits flexibility for an amenity such as a ½ bath or powder room, and limits tenant type to single users and not families or single adult and one child. - Allow temporary residential use of future commercial spaces to provide affordable housing while the market adjusts. It
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Themes	Stakeholder Feedback
	can be difficult to get financing for commercial spaces, limiting overall mixed-use development.
To encourage density	▪ Push for Vertical Housing Tax Credits in all R-3 and Mixed-Use Zones, including the Downtown, by eliminating unnecessary regulation and providing staff assistance with the application materials; ▪ Review the code for unintended barriers to density.
To increase feasibility of ADU development	▪ Amend code to increase “lot coverage” allocations with ADU proposals. For instance, allow an extra 15% of lot coverage for ARU’s less than 350 sq. ft. ▪ Reduce or eliminate current building separation requirements for structures on the same lot, specifically main house and ARU units

Appendix D. HPS Summary of Past Engagement and Community Feedback on Housing Related issues

Meeting Name	Meeting Date	Purpose	Who participated	Summary of Input
Middle Housing Public Meeting (ORD 3199)	10/13/2020 12/22/2020 2/23/2021 4/27/2021	Review and discussion of ORD 3199- Middle Housing policies	Planning Commission 3 members of the public 1 professional planner	Discussion and information regarding State requirements and changes. Recommendation for the City to provide pre-approved plans such as other cities have done. Parking concerns. https://www.ashland.or.us/Agendas.asp?AMID=7599&Display=Minutes https://www.ashland.or.us/Agendas.asp?AMID=7656&Display=Minutes https://www.ashland.or.us/Agendas.asp?AMID=7698&Display=Minutes https://www.ashland.or.us/Agendas.asp?AMID=7738&Display=Minutes
Middle Housing Public Hearing (ORD 3199)	5/11/2021	Public input on Ordinance establishing middle housing policies	Planning Commission	Planning Commission recommended approval of the ordinance.
Development Round Table Meeting	4/21/2021	Provide information and obtain comments on proposed	35 development professionals: developers, planners, design professionals, contractors	Thirty-five development professionals including planners, design professionals, contractors and developers attended a developer round table to learn about HB2001, and to review and discuss proposed code

		code amendments		changes to support the development of Accessory Residential Units and Duplexes within Ashland.
Middle Housing Public Meeting (ORD 3199)	4/22/2021	Review, discussion, and recommendation of ORD 3199-Middle Housing policies	Housing and Human Services Commission ⁴⁴	Supported recommendations for duplex and ARU code Changes. https://www.ashland.or.us/Agendas.asp?AMID=7737&Display=Minutes
Middle Housing Public Meeting (ORD 3199)	5/5/2021	Review, discussion, and recommendation of ORD 3199-Middle Housing policies	Historic Commission	No recommendations https://www.ashland.or.us/Agendas.asp?AMID=7744&Display=Minutes
HCA Advisory Group meetings	01/11/2021 03/01/2021 04/26/2021 12/07/2020	Review of assumptions, review and discussion of policies/actions,	Planning, housing, climate action commission members, Ashland School Board member, and private and affordable housing developers	https://www.ashland.or.us/SIB/files/Ashland_Housing_Strategy_Draft_02_19_21.pdf https://www.ashland.or.us/SIB/files/Ashland_HCA_AC_%232_Meeting_Notes.pdf https://www.ashland.or.us/SIB/files/Ashland_HCA_PAC_%231_Meeting_Notes.pdf

⁴⁴ The Housing and Human Services Commission has since changed its name to the Housing and Human Services Advisory Committee.

Housing Capacity Analysis Virtual Open House	4/1-4/16/2021	Provide information and obtain public comments to better understand and address the communities housing needs.	394 community members attended	https://www.ashland.or.us/SIB/files/HCA_openhouse_Survey_Results_20210416.pdf
Housing Capacity Analysis Public Hearings	05/19/2020 05/17/2021 08/17/2021 08/03/2021	Review and Recommendations for the HCA data, assumptions, policies, and actions	City Council	Approved HCA as presented. https://www.ashland.or.us/Agendas.asp?AMID=7530&Display=Minutes https://www.ashland.or.us/Agendas.asp?AMID=7760&Display=Minutes https://www.ashland.or.us/Agendas.asp?AMID=7832&Display=Minutes https://www.ashland.or.us/Agendas.asp?AMID=7820&Display=Minutes
Housing Capacity Analysis Public Hearings	07/13/2021 03/23/2021	Review and Recommendations for the HCA	Planning Commission	Commissioner Thompson shared her concern on building smaller units that seemed more suited for retirees and not families. She was interested in strategies for larger units that were affordable. Chair Norton was encouraged that 400 people attended the virtual meeting and they received 300 surveys. https://www.ashland.or.us/Agendas.asp?AMID=7803&Display=Minutes https://www.ashland.or.us/Agendas.asp?AMID=7714&Display=Minutes

Housing Capacity Analysis Public Hearings	03/25/2021 06/24/2021	Review and Recommendations for the HCA	Housing and Human Services Commission Joint Housing and Planning Commission	https://www.ashland.or.us/SIB/files/2021_6_24_draft_minutes.pdf https://www.ashland.or.us/Agendas.asp?AMID=7715&Display=Minutes Commission discussed aging population and urban renewal. Commission voted to accept and support the HCA.
2020-2024 Consolidated Plan-priorities questionnaire	2/1-3/1/2020	Evaluation of spending priorities for the CDBG program over the five-year period between 2020-2024	134 community members and DHS staff	Citizens identified which types of activities were high or low priorities for the limited CDBG resources. Affordable housing was the highest priority identified.
2020-2024 Consolidated Plan Public Hearing	3/26/2020	Review, discussion, and recommendation of the 2020-2024 Consolidated Plan	Housing and Human Services Commission	Recommended approval of 5- year strategic Plan for the use of CDBG funding. https://www.ashland.or.us/Agendas.asp?AMID=7519&Display=Minutes
2020-2024 Consolidated Plan Public Hearing	4/21/2020	Review, discussion, and recommendation of the 2020-2024 Consolidated Plan	City Council	Approved adoption of the 5-year strategic Plan for the use of CDBG funding. https://www.ashland.or.us/Agendas.asp?AMID=7522&Display=Minutes

Housing Element Housing Forum	3/8/2017	Discussion policies, priorities and narrative	20 community members/developers/service providers	Support of environmental and conservation measures, concerns and support of more goals/policies that support affordable housing, support of universal design/accessibility/aging in place. Comments about using vernacular language (not technical) tables and references and assumptions are dated and some are no longer accurate.
Housing Element Questionnaire	1/2017 9/2018	Feedback on policies and priorities	357 visits, 144 responses 553 visits, 221 responses	https://www.ashland.or.us/SIB/files/adopted-housing-policy-questionnaire-2017-all.pdf
Housing Element Public Hearing	11/15/2018	Review, discussion, and recommendation	Housing and Human Services Commission	Recommended approval with no changes. https://www.ashland.or.us/Agendas.asp?AMID=7119&Display=Minutes
Housing Element Public Hearing	11/27/2018	Review, discussion, and recommendation	Planning Commission	Recommended approval of the document with some alterations: Suggested an additional policy under proposed Goal 1 to encourage the retention and development of rental housing. Suggested that a definition for universal housing/universal design, suggested wording and policy changes to improve clarity. https://www.ashland.or.us/Agendas.asp?AMID=7124&Display=Minutes
Housing Element Public Hearing	06/04/2019 06/18/2019	Review, discussion, and recommendation, and approval	City Council	Concerns about density and parking. HE approved as presented. https://www.ashland.or.us/Agendas.asp?AMID=7293&Display=Minutes https://www.ashland.or.us/Agendas.asp?AMID=7306&Display=Minutes

Rent Burden	9/26/2019	Public Forum to discuss rent burden	Housing and Human Services Commission	https://www.ashland.or.us/Agendas.asp?AMID=7382&Display=Minutes
Rent Burden	12/10/2020	Public Forum to discuss rent burden	Housing and Human Services Commission	https://www.ashland.or.us/Agendas.asp?AMID=7650&Display=Minutes
Rent Burden	08/25/2022	Public Forum to discuss rent burden and HPS strategies	Housing and Human Services Commission	https://www.ashland.or.us/Agendas.asp?Display=Agenda&AMID=8134
Housing and Human Services commission Regular Monthly Meeting	4 th Thursday of the month	To provide public comment and recommendation s and information to the City Council regarding policy and funding strategies relating to housing and human services, Community Development Block Grants, and Affordable	Housing and Human Services Commission is comprised of nine volunteer members and their regular monthly meetings are public meetings where the continuum of housing and human services needs of the community are discussed.	https://www.ashland.or.us/CCBIndex.asp?CCBID=239

		Housing Trust Fund allocations.		
SOU tabling and focus group meeting to discuss housing issues and HPS strategies	5/23/2022	Obtain targeted community feedback regarding housing needs and strategic priorities	46 students completed surveys 3 students participated in a focus group	SOU Family Housing is dealing with competition for space—students, some staff/faculty. Policy is changing to make it harder for staff/faculty to get units, putting higher priority on veterans, students with families. Housing staff are also contending with increasing costs for maintenance/repairs/materials as well as a staff shortage. These students all report a monthly income 1000-2000/mo. Very low income. Students report running into caps in rental agreements on the number of persons who can share bedrooms. Additional way some people raise rent money: dealing drugs. S. reported that the people she knows who have the most money to live on are dealers. Suggestions for what City policy could do to help: N. suggested more flexibility for allowing domes or other alternative housing structures in the city, encourage more innovative/unconventional housing types that would be affordable. Adding a City fee/tax on vacant/unoccupied houses. SOU workforce housing issues some employees get SOU apartments as part of their compensation. Jason noted that the only way he could afford to take this job was that it came with living quarters. Both said their annual income was around \$35K annually, in addition to the campus supplied housing.

Open City Hall online survey	8/24/22-10/14/2022	Obtain community feedback regarding housing needs and strategic priorities	339 attendees 236 responses	https://www.ashland.or.us/Page.asp?NavID=13461&pd_url=https%3A%2F%2Fwww.opentownhall.com%2Fportals%2F89%2FIssue_12081#peak_democracy
Virtual Open House	10/19/2020	Obtain community feedback regarding housing needs and strategic priorities	7 attendees	

Appendix E. Pre-HPS Survey

Housing Portal

Pre-HPS Survey Submission

Page: 1 of 5

Year: 2023 City: Ashland

Submitted Date: 01/24/2023

4/17/2023 12:38:14 pm

Category	Strategy	Encourage Needed Housing	Increase Affordability	Reduce Rent Burden
A - Zoning and Code Changes	A01 - Ensure Land Zoned for Higher Density is not Developed at Lower Densities	Yes	Yes	Yes
	Comments: Stacked townhomes, condominiums, garden apartments and larger-scale apartments are permitted in R-2 and R-3 zones. However due to small lot sizes of vacant/partially vacant properties available in these zones, larger scale apartments are not often achievable given existing lot sizes, height limitations, and density allowances.			
A - Zoning and Code Changes	A01 - Ensure Land Zoned for Higher Density is not Developed at Lower Densities	Yes	Yes	Yes
	Comments: Minimum Density requirements (80% base density) are in place in multifamily residential zones (R-2 and R-3) on lots large enough to accommodate 3 or more units. Minimum densities and are required of any residential annexation equal to 90% Base Density exclusive of environmentally constrained lands.			
A - Zoning and Code Changes	A02 - Zoning Changes to Facilitate the Use of Lower-Cost Housing Types	Yes	Yes	Yes
	Comments: Tri- and Quad-Plexes Townhomes, Row Houses, Stacked Townhouses are permissible in Ashland's Medium Density zone (R-2), and Townhomes are further permitted in the R-1-3.5 zone or other residential zones (R-1-5, R-1-7.5, R-1-10) through planned unit developments.			
A - Zoning and Code Changes	A03 - FAR, Density, or Height Bonuses for Affordable Housing	Yes	Yes	Yes
	Comments: Ashland has four density bonuses, one of which is for development of affordable housing at higher densities and another for energy-efficient housing. ? Affordable housing projects meeting eligibility requirements (including rental or ownership housing affordable to households at 80% or less of AMI for a min. of 30 years) receive a density bonus of two units for each affordable unit provided, up to a max. of a 35% increase in density. ? The max. density bonus inclusive of other bonuses (open space, conservation) can be 60% over the base density within the zone. ? Ashland's Cottage Housing Development ordinance effectively provides a doubling of the allowable density in the zone for provision of the small cottage housing units. Ashland classifies small units, of 500 SF or less, as only 75% of a unit for the purposes of density calculations. A greater number of small units can be developed within existing density allowances without employing a density bonus.			
A - Zoning and Code Changes	A05 - Code Provisions for ADUs	Yes	Yes	No
	Comments: Ashland allows Duplexes and Accessory Residential Units wherever a single-family dwelling unit is permitted per the requirements of HB2001. Code amendments were enacted in June 2021.			

A - Zoning and Code Changes	A08 - Promote Cottage Cluster Housing	Yes	Yes	No
Comments:	Ashland adopted cottage housing ordinance in November 2017 which allows cottage housing developments within single family zones. Following adoption Ashland has approved a number of cottage housing developments.			
A - Zoning and Code Changes	A08 - Promote Cottage Cluster Housing	Yes	Yes	Yes
Comments:	The Cottage Housing Ordinance adopted allows cottage housing in single family residential zones (R-1-5, R-1-7.5, and NN-1-5) and established the following provisions: ? A minimum of 3, and a maximum of 12, cottages can be provided in a cottage housing development depending on lot size. ? Cottages shall be no larger than 1000sq.ft., and at least 75% of the cottages shall be less than 800sq.ft. The parking requirements for cottage housing units was reduced to be as follows: Units less than 800 sq. ft. - 1 space/unit; Units greater than 800 square feet and less than 1000 square feet -1.5 spaces/unit.			
A - Zoning and Code Changes	A10 - Inclusionary Zoning	Yes	Yes	Yes
Comments:	Ashland requires a percentage of affordable housing (25% of the base density exclusive of unbuildable areas) as part of residential annexations, as well as for zone changes that increase residential density by 4 units or more: https://ashland.municipal.codes/LandUse/18.5.8.050.G			
A - Zoning and Code Changes	A13 - FAR & Density Transfer Provisions	Yes	Yes	No
Comments:	Ashland permits Planned Unit Developments in SFR and MFR zones which allows clustering of units and transfer of density from naturally constrained areas to the developable portion of the site.			
A - Zoning and Code Changes	A14 - Re-examine Requirements for Ground-floor Retail/Commercial	Yes	No	No
Comments:	Mixed use projects are permitted and encouraged in Ashland Commercial, and Employment zoned.			
A - Zoning and Code Changes	A15 - Encourage Diverse Housing Types in High-Opportunity Neighborhoods	Yes	Yes	Yes
Comments:	Ashland recently removed the maximum residential densities within the Transit Triangle Overlay area (Ashland Street, portions of Siskiyou Blvd, and Tolman Creek Road). A form-based approach is used where limitations on height, lot coverage, and setback requirements create the 3D envelope in which units can be developed. This allows for many smaller units within the same space when compared to a base density approach which can produce fewer, large apartments or condominiums.			
A - Zoning and Code Changes	A15 - Encourage Diverse Housing Types in High-Opportunity Neighborhoods	Yes	Yes	Yes
Comments:	Live-work housing and mixed-development would be a permitted use within commercial zones although not specifically listed in the allowable use table for either commercial or residential zones. Home Occupations are special permitted in all zoning designations except for industrial (M-1).			

A - Zoning and Code Changes	A17 - Small Dwelling Unit Developments	Yes	Yes	Yes
Comments:	Planned Unit Developments in all SFR and MFR zones will allow for small lots (up to zero lot line and no minimum lot size) at allowable Densities for the zone. Additionally, cottage housing developments in SFR zones (R-1-5 & R-1-7.5) allow lots			
A - Zoning and Code Changes	A18 - Increase Density near Transit Stations and Regional Multi-use Trails	Yes	Yes	Yes
Comments:	Implements recommendations of an infill strategy to promote more housing within an area surrounding the bus route in the southeastern part of Ashland that circulates on Ashland St., Tolman Creek Rd., and Siskiyou Blvd. The approved Ordinance creates a Zoning Overlay, known as the Transit Triangle, that allows for a reduced amount of required commercial or employment uses from 65% to 35% of the ground floor in mixed-use buildings, a reduced parking requirement for small units, elimination of housing density maximums, and a requirement to provide rental housing in exchange for utilizing the optional Transit Triangle Overlay provisions.			
B - Reduce Regulatory Impediments	B01 - Remove or Reduce Minimum Parking Requirements	Yes	Yes	No
Comments:	Ashland allows Accessory Residential Units (ARU or ADU) as an accessory use to single-family homes throughout the City with only Building Permit approval. Ashland further provides reduced SDCs for small units of less than 500 SF. No additional parking is required for ARUs in Ashland, and there has never been any owner-occupied requirement for the development of an ARU within the City.			
B - Reduce Regulatory Impediments	B01 - Remove or Reduce Minimum Parking Requirements	Yes	Yes	No
Comments:	Ashland provides parking reductions for small units city-wide (one space per unit for units 500 SF or less). Within the Transit Triangle Overlay parking requirements are reduced to one space per unit for units 800 SF or less. Cottages of 800 SF or less within approved cottage housing developments require one space per unit. Many parking credits may be allocated to projects including: ? Off-street parking credit (1 for 1) for each on-street space along the property's frontage; ? joint use and mixed-use development credits (sharing the same space between a commercial use and residential use when demonstrated their time of use is not in conflict); ? off-site shared parking; ? transit facilities credit; ? Transportation Demand Management plan implementation.			
B - Reduce Regulatory Impediments	B10 - Public Facility Planning	No	Yes	No
Comments:	Ashland has long implemented a "Narrow Street" standard through the Street Standards and Transportation System Plan. The narrow street and interconnected grid pattern promoted by Ashland's Street Standards both reduces development costs associated with new streets in subdivisions and retains developable land for new housing.			
C - Financial Incentives	C01 - Reduce or Exempt SDCs for Needed Housing	Yes	Yes	Yes

Comments:				
C - Financial Incentives	C03 - Reduce or Exempt SDCs for ADUs	Yes	Yes	Yes
Comments: for a unit less than 800 sqft we charge .75 SDC's, and for units under 500 sqft we charge .50 SDC's				
C - Financial Incentives	C03 - Reduce or Exempt SDCs for ADUs	Yes	Yes	No
Comments: Allow a deferment in the payment of SDC's to occur at Certificate of Occupancy, or one year at 0% interest, or up to 10 years with an indexed interest rate. For multifamily units can utilize an installment loan of up to 20 years with a 0% interest. AMC 4.20				
C - Financial Incentives	C06 - Publicly Funded Infrastructure Improvements	Yes	Yes	Yes
Comments: Through CDBG and the City's Affordable Housing Trust Funds				
D - Financial Resources	D01 - Community Development Block Grant (CDBG)	Yes	Yes	Yes
Comments: Ashland is a direct Community Development Block Grant (CDBG) entitlement community and receives HUD allocations of approx. \$175,000/year. The 5-year Consolidated Plan for use of CDBG funds prioritizes capital restricted CDBG funds toward affordable housing and shelter and 15% of the award is typically provided to service providers benefiting extremely low-income individuals.				
D - Financial Resources	D03 - Housing Trust Funds	Yes	Yes	Yes
Comments: Ashland's Affordable Housing Trust Fund is part of the General Fund and is used to support the development of affordable housing. The City has not issued a bond to generate revenue for affordable housing				
E - Tax Exemption and Abatement	E03 - Vertical Housing Development Zone Tax Abatement	Yes	Yes	Yes
Comments: A Vertical Housing Development Zone has been established for designated Commercially zoned properties within the Transit Triangle to promote the development of mixed-use projects that incorporate multiple floors of housing.				
F - Land, Acquisition, Lease, and Partnerships	F03 - Community Land Trusts	Yes	Yes	No
Comments: A land trust is typically a nonprofit organization that owns land and sells or leases the housing on the land to income-qualified buyers. There are 49 units within Ashland that are operated under the land Trust model. The Ashland Community Land Trust operated in Ashland from 2000 until 2015 when the non-profit organization formally dissolved. And transferred their 18 affordable land trusted housing units to ACCESS Inc. Rogue Valley Community Development Corporation developed 31 units under the land trust model which were transferred to NeighborWorks Umpqua for administration.				

F - Land, Acquisition, Lease, and Partnerships	F05 - Preserving Low-Cost Rental Housing to Mitigate Displacement	Yes	No	No
Comments:	Ashland has an ordinance that regulates conversion of apartments into condominiums, providing for preservation of multi-family rentals and providing for longer notice periods prior to tenant displacement and relocation assistance can be required. Ashland's demolition ordinance does regulate demolitions of housing, requiring replacement dwellings be provide as part of the demolition proposal. Further, the demolition of a house (over 45 years old) must demonstrate it is not financially viable to retain the structure versus replacement, thus promoting renovation as opposed to removal.			
F - Land, Acquisition, Lease, and Partnerships	F12 - Surplus Land for Affordable Housing	Yes	Yes	Yes
Comments:	Ashland has dedicated surplus City property for the development of affordable housing or sold surplus City property and directed the proceeds into the Ashland Housing Trust Fund to support affordable housing development.			

Sunstone Housing Collaborative

Request for Proposal for
Development Team
for the
Ashland Attainable Housing Project
79 Lincoln Street,
Ashland, OR 97520

Issue Date: November 6, 2024

Mandatory Pre-proposal Meeting: November 12th, 2024,
3:00PM (local time)

Questions Due: November 25th, 2024, 2:00PM

Due Date/Time: December 2, 2024, 10:00AM

LATE PROPOSALS WILL NOT BE ACCEPTED

INTRODUCTION

Sunstone Housing Collaborative (“Sunstone”) is a nonprofit organization assembled to develop the Ashland Attainable Housing Project (“Project”). Sunstone Housing Collaborative was established in December 2023 to support the educational mission of Ashland School District and the associated Housing Production Strategy of Ashland by creating community partnerships to develop mixed-income housing targeted to district staff as well as families with children. Sunstone is committed to providing housing and services for low-median income households of the Ashland community.

Sunstone Housing Collaborative issues this Development Team Request for Proposal (“RFP”) to obtain funding, design, permit, and construct a residential community that provides attainable, income-restricted rental and homeownership options. The selected development team will be expected to participate in an integrated process including but not limited to the assembly of funding applications, architectural plans (schematic designs, bid sets and final construction plans and specifications), project scheduling, value analysis, construction sequencing and the procurement of subcontractors, suppliers, project architect, engineers and inspectors. The development team will include a project architect, project manager, construction manager and general contractor at minimum.

Interested parties should provide a response as indicated below by **10:00 AM local time on Monday December 2, 2024**. This RFP includes a brief project description, prequalification requirements, as well as submission information below. We understand that this is a complex project and welcome any questions to assist interested parties in submitting a qualified proposal.

Project Goals

Sunstone is seeking a developer who will generate a Development Team to create an attainable housing project that meets the goals Sunstone has for Ashland’s community. Sunstone is looking for a developer with a vision for the project, and that understands or is interested in integrating a community, uplifting low-moderate income teachers, and families with children. We want our Developer to be experienced, open to answering questions and be collaborative as this is our first housing project. We want to keep our residents at the top of mind in all the work that we will do to create and build this project and having a Developer that understands that is important to us. The Developer will advise the team during the pre-development phases and coordinate and manage the construction of the project as a member of the Project Development Team. The Developer should be familiar with teacher or other occupationally-preference housing.

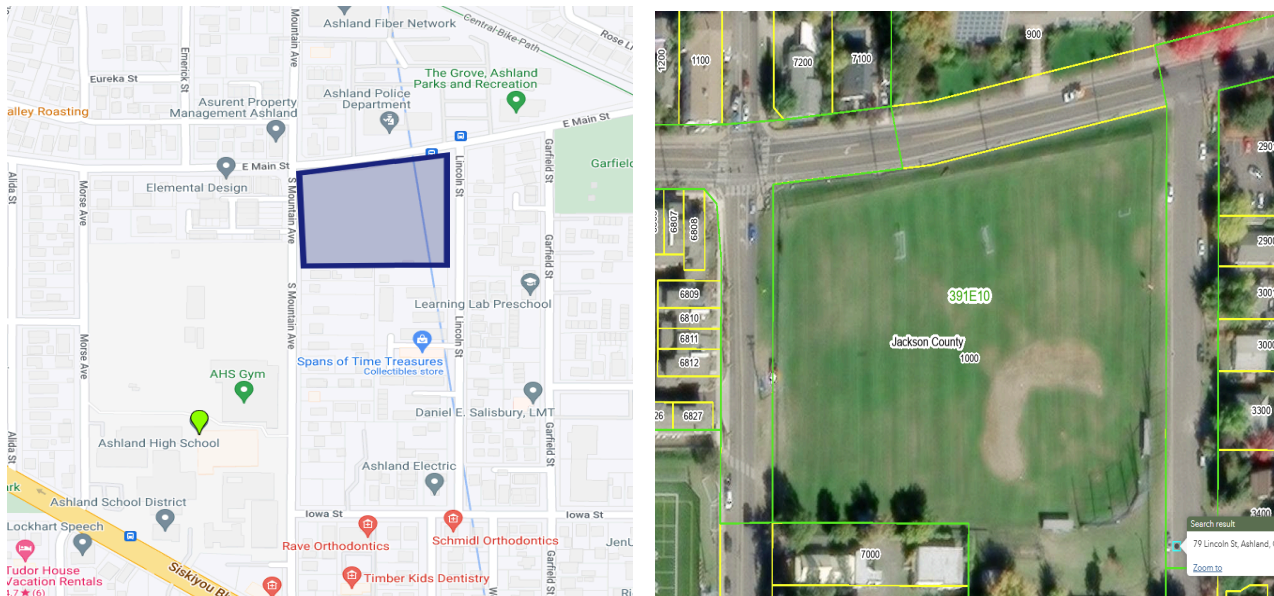
This unique project is intended to serve multiple purposes, including, but not limited to developing ninety units minimum of varying multi-family housing types (apartments, townhouses, cottages), sized from studio to three bedrooms. The Project intends to serve residents with income restrictions and families. Unit affordability will be split with <80% AMI

(area median income) and 80-120% AMI. The Project will offer community spaces as presented in the Master Plan to include, but are not limited to childcare, playground, classrooms/community space, community garden, offices, resident services, and rooftop gardening. The development will be fully fire sprinklered. Site and landscape work will include keeping as many trees as possible.

Project Background

The proposed building site located between Mountain Avenue and Lincoln Avenue has historically been used as the Ashland High School athletic field. Due to the intermittent nature of its use, a potential opportunity to address the growing needs for community and District housing is being discussed. This innovative and important project is intended to be a public-private partnership wherein Sunstone and the selected developer shall collaborate to develop a residential project that provides much needed attainable housing for prospective year-round residents. Imbalanced housing costs limit the options for households with children, our local workforce, and Ashland residents are often marginalized. As a result, Sunstone, supported by the Ashland School District, seeks to partner with a developer and other local government entities to develop an innovative model of housing that meets the needs of those impacted by the attainable housing void.

SITE INFORMATION



Basic Property Information

Client/Owner: Ashland School District 885 Siskiyou Boulevard, Ashland, OR 97520

Map & Tax lot: 39-1E-10-1000

Authorities Having Jurisdiction (AHJ): City of Ashland

Acreage: 4.18 AC (182,081 SF)

Zoning: R-3 (Multiple Family)

Notable Overlay Zones: Hillside lands – slopes >25%

Land

The District owns 4.18 acres of land along Main Street, between South Mountain Avenue and Lincoln Street near Ashland High School, located at 79 Lincoln Street. This is one lot but could be divided into any combination that would mix housing of 80-120% AMI and 80% and below.

Development

Located at 79 Lincoln Street, Ashland, the Ashland Attainable Housing Project will develop safe and attainable housing and support to individuals and families in Jackson County. On 4.18 acres, the proposed development will be located on an underutilized athletic field and will include housing, community spaces, offices, and parking. The integration and continuity of the community is important to Sunstone in developing a welcoming inclusive space that addresses multiple needs.

Attached in the addendum is the Master Plan created by Ashland Architect, Chris Brown from Arkitek. Our intention is to find a partner(s) that can follow, as closely as possible, the general plan outlined in the plan.

Additional Project Objectives

- Property can be developed by one or more developers at mixed income for the entire four acres, or in part according to Master Plan requirements.
- Phased implementation plan
- Innovative models given preferential consideration such as land trust homeownership, co-housing, long-term lease and other suggested forms of housing from the [City of Ashland Housing Production Strategy](#).
- Project is required to meet Oregon sustainability standards. Innovative building methods and other sustainability upgrades and features should all be explored (LEED, Earth Advantage, solar, stormwater, greywater, local materials, climate readiness).
- Options for community spaces on site as presented in the Master Plan (childcare, playground, classrooms/community space, community garden, offices, resident services, rooftop gardening).
- Ashland Attainable Housing development will include various housing types, community spaces, playground, childcare center, and gardening plots.

- Site improvements such as utility extensions, new sidewalks, parking, driveways, greenspace, courtyard, on-site storm detention and additional landscape work are included in this development.
-

SCOPE OF SERVICES

Developer

Ashland Attainable Housing Project seeks a developer to provide full services including concept development, recruitment, and coordination of the design team; securing project funding; and project management during construction through close out. There is flexibility regarding when work needs to start, but Sunstone wants the project to be ready to submit competitive funding applications in early 2025.

A successful Development Team, either through in-house or sub-consultants, shall provide Sunstone with professional services in the following areas:

- Architecture
- Civil Engineering
- Cost Estimating
- Construction Administration
- Electrical Engineering
- Geotechnical
- Landscape Architecture
- Mechanical and Plumbing Engineering
- Site Planning
- Structural Engineering
- Survey

The sale of the property is expected to be conducted using a Disposition and Development Agreement negotiated with Ashland School District through Sunstone, which will describe the conditions for releasing the Property for construction of the proposed housing. It is envisioned that the Project will purchase the entire property from the Ashland School District at Fair Market Value, although Developer(s) may propose alternate sale conditions for Sunstone and Ashland School District consideration.

Overview of Required Services

The Developer(s) will procure a development team that will include, but is not limited to, a construction project manager (CM), general contractor (GC), project architect (PA), finance project manager (FM), and other consultants as necessary (collective, "Development Team").

Construction Project Manager/General Contractor (CM/GC)

The CM/GC will be skilled in developing schedules, preparing construction cost estimates at the schematic design, design development and construction document stages, performing value engineering, analyzing alternative designs, costs and constructability issues, studying labor conditions, understanding construction methods and techniques, and coordinating and communicating these activities throughout the design and construction phases to all members of the Development Team. In addition, the CM/GC shall be familiar with the local labor and subcontracting market. Depending on the funding sources obtained, the Project may be subject to prevailing wages and/or workforce hiring, apprenticeship, and training requirements. The CM/GC should be familiar with BOLI, Davis-Bacon and other prevailing wage requirements and procedures. Union labor may also be applicable to this project.

The following provides an outline of services to be provided by the CM/GC:

Pre-Construction Services: Pre-Construction services will be performed by the selected CM/GC anticipated to be under an AIA-based agreement to be negotiated with the Owner utilizing an AIA A133 Contract Form including AIA A201. During the Pre-Construction Phase, the CM/GC will work with the Development Team to analyze the design and recommend modifications for improving constructability and saving construction time and cost. It is anticipated that the CM/GC will join the Development Team at the Schematic Design phase.

The CM/GC will review the design and construction documents for constructability and prepare a formal list of comments to be reviewed and coordinated with Sunstone and the Development Team. The sequence of construction and efficient use of construction materials and labor will be considered. The CM/GC will enlist Subcontractor participation to determine material lead times and tolerances. As the CM/GC will review the documents for constructability, conformance to the estimate and readiness for bid, efforts should be made to identify potential errors and omissions, and to communicate these concerns to the Project Architect.

A problem resolution procedure with clear responsibility assignments must be developed by the Development Team. Review of documents by the CM/GC as they evolve is a highly valuable means of detecting design errors. Since the CM/GC will be reviewing the documents for constructability, conformance with the estimate, and readiness for bid packaging, design errors and/or omissions should also be caught during these reviews.

Scheduling: The Development Team, led by PA, will produce an initial Scope of Work which will include a preliminary design and development schedule. This schedule will show each of the programming and design phases, identify critical milestone dates, and note what decisions are needed to be made by Sunstone. The CM/GC will work closely with the Development Team to finalize the schedule to show activities necessary to complete all aspects of the design requirements and all construction activities through the issuance of a final certificate of occupancy. The CM/GC will utilize their experience and available Subcontractor input to determine long lead items and critical path tasks for completion of the Project in the allotted time frame. The CM/GC will implement a computerized, cost-loaded scheduling system for use during the pre-construction and construction phases.

Cost Estimating: At a minimum, the CM/GC will provide full Project cost estimates at the end of the Schematic Design, Design Development phase, and at 50% Construction Document completion. The CM/GC will provide recommendations to the Development Team for keeping costs within the Project budget, value engineering recommendations, life cycle costs, and periodic updates to the cost estimate throughout the pre-construction phase. The CM/GC will utilize their experience and available Subcontractor input to verify the CM/GC's estimates for major building systems and will establish budget line items for portions of Work for which the design is not complete.

Constructability Review: The CM/GC will review the design and construction documents for constructability and prepare a formal list of comments to be reviewed and coordinated with Sunstone and the Development Team.

Bidding and Contract Negotiation: In cooperation with Sunstone and the Development Team, the CM/GC will establish a GMP for the construction contract. The CM/GC will establish and implement a process to solicit competitive Subcontractor bids for all the Work in conformance with local and state requirements. Any savings the CM/GC realizes in performing the public improvement contract will accrue to Sunstone unless the contract provides otherwise. The bid process will be designed to encourage maximum participation by Minority-, Women-owned, and Emerging Small Businesses (MWESBs), Service Disabled Veteran Business Enterprises (SDVBEs), or local business enterprises, subcontractors, vendors, and labor resources. The CM/GC is expected to meet or exceed funding requirements for MWESB/SDVBE participation, such as goals included in Oregon Housing and Community Services' MWESB Compliance Manual.

Construction Period: The CM/GC will complete the Work according to the construction documents. The schedule for the Project will be guaranteed by the contract between Sunstone and the CM/GC. The subcontracts will be between the CM/GC and the subcontractors. The contract and/or subcontracts will contain liquidated damages provisions, in the event of late completion. The CM/GC shall be required to document and track construction waste management, CM/GC will be responsible for ensuring that Subcontractors document and track the required information.

The CM/GC shall hold construction meetings and shall prepare Progress reports, including but not limited to photos, construction schedule, and financial summaries that are to be distributed to all recipients on a schedule agreed upon by Sunstone and Development Team.

The CM/GC shall prepare a comprehensive permitting management schedule to support the administration of the project's "critical path" schedule. The CM/GC shall also be responsible for obtaining and administering necessary Permits and Testing and Inspections for project Work outlined in the Scope of Work.

Project Close-Out: Before final inspections, Sunstone and Project Architect will create a punch list that will be provided to CM/GC. The CM/GC will maintain all relevant Project archive records on behalf of Sunstone including but not limited to, as-built drawings, specifications, submittals, inspection reports and related information. Upon completion of construction, the CM/GC will provide Project record drawings, field order, and change order records, technical submittals,

testing and inspection reports and operating manuals to Sunstone. The CM/GC's submittals will be assembled in an organized fashion and turned over to the appropriate Sunstone representative. Where commissioning requires operating performance of the completed facility to specified levels, these shall be measured and documented with Sunstone and appropriate Development Team members present.

The CM/GC will prepare an Operations and Maintenance Manual that outlines the Owner's responsibilities to ensure that the Warranty remains valid. The Maintenance Manual is an invaluable asset to the property's maintenance personnel and will assist in the development of a preventive maintenance program. It is also an opportunity to clarify manufacturer and vendor warranty provisions as well as the CM/GC's responsibilities.

The GC will be expected to:

- Be skilled in developing schedules.
- Provide pre-construction cost estimating services. Cost estimates are anticipated due at 100% Schematic Design for funding submittals, 100% Design Development, 50% Construction Documents, and an update at 100% Construction Documents.
- Perform value engineering.
- Analyze alternative designs, costs, and constructability issues.
- Be familiar with the labor laws, the local labor and subcontracting market and prevailing wage requirements.
- Understand construction methods and techniques.
- Coordinate and communicate these activities to the Project Team through the entire project.
- Coordinate with Owner's consultants, such as Geotech, fenestration testing, structural special inspections, etc.
- Ensure public safety throughout construction.
- Be familiar with and understand funding requirements during all phases of a project.
- Meet or exceed MWESB/COBID and Workforce training, apprenticeship, and training goals, as determined by funding sources.
- Participate in weekly or bi-weekly meetings, in person and remote.

Additional Requirements

- No Proposal for CM/GC services related to this Project shall be received or considered by Sunstone unless the Proposer has a current, valid certificate of registration issued by the Construction Contractors Board.
- Contract format is anticipated to be:
 - The pre development phase will be an agreement between the general contractor and Sunstone.
 - A (modified by agreement) A101-2017 / A201-2017 for the remainder of the project.

Project Architect

Experience and Expertise

The successful Project Team, with a preference for in-house or sub-consultants with a physical presence in the Ashland and/or Jackson County area, shall exhibit recent and relevant experience and expertise in the following areas:

- Multi-family and/or single-family new construction
- Assessment of existing conditions for the site.
- Working in a team configuration with Sunstone's Developer, the Construction Manager/General Contractor, and Owner.
- Mechanical and electrical design.
- Green building and sustainable practices with a focus on building and energy performance.
- Experience with completing work in phases.
- Expert knowledge of current applicable codes, including, and not limited to:
 - Oregon Residential, Structural, Energy, Mechanical and Plumbing Specialty Codes
 - Jackson County requirements.
- Cost estimating.
- Preparation of necessary design and construction documentation to facilitate the cost estimating by the Construction Management/General Contractor
- Construction Administration.

Specific Services Requested

Project Architect will be responsible for providing the following services, while ensuring the project stays on schedule and within budget. Typical services include, but are not limited to:

A. Programming Phase

The Project Architect will confirm the project program, scope of work and schedule for Sunstone's approval. In addition, the Project Architect will advise Sunstone of the scope and nature of any laboratory or field tests, inspections, or investigations which the Project Architect recommends for proper planning and design of the project. Sunstone will work in conjunction with the Developer and Project Architect to procure the necessary services to complete the agreed upon tests, inspections, and investigations. After written approval from Sunstone of the project design and Schedule, the Project Architect will commence the development of the Schematic Design package.

B. Schematic Design Phase

Upon written approval of the Programming Phase, the Project Architect will provide a Schematic Design package including but not limited to:

- Site Plan showing existing site and infrastructure, parking, circulation (both pedestrian and vehicular), site drainage and landscaping.
- Analysis of existing conditions including infrastructure systems, landscape, and drainage.
- Summary of all tests, inspection, and investigation reports.
- Outline specifications sufficient to define quality of materials intended.
- Preliminary cost estimates covering all work designed or specified by the Development Team.
- Code and regulation analysis.

- Necessary documentation required by Sunstone to facilitate applications for funding.

C. Design Development Phase

Upon written approval from Sunstone of the Schematic Design package, the Project Architect will commence with the preparation of a Design Development package including but not limited to:

- Drawings and specifications sufficient to illustrate project scope including site, building, landscape, and engineering drawings.
- Additional documentation required for cost estimate analysis by Construction Management/General Contractor.
- Preliminary recommendations for construction phasing.

D. Construction and Contract Documents Phase

After written approval from Sunstone of the Design Development Documents, the Project Architect shall prepare Construction and Contract Documents. These documents shall include but not limited to:

- Plans and drawings
- General Conditions
- Technical Specifications
- Additional documentation as required by the CM/GC to update cost estimation.

E. Construction Administration and Post Completion and Warranty Phase

After written approval from Sunstone of the Construction and Contract Documents, the Project Architect will review schedules, product submittals, shop drawings for conformance with the Construction Documents, monitor quality, progress of the work, and advise Sunstone on project related issues. After execution of the Certificate of Completion by Sunstone, the Project Architect shall consult with and make recommendations to Sunstone during the warranties period and perform inspections as scheduled after construction is complete.

F. Capital Replacement Planning

Project Architect may be asked to work with Sunstone to prepare a capital replacement plan, including design and specifications for future replacements and improvements to the property.

Minimum Requirements

To be qualified to respond, firms must possess at least five (5) years of recent and relevant experience. In addition, the selected firms must not be debarred, suspended, or otherwise ineligible to contract with Sunstone, and must not be included on the General Services Administration's "List of Parties Excluded From Federal Procurement and Non-Procurement

Programs” or the Department of Housing and Urban Development’s “Limited Denial of Participation” list.

DEVELOPMENT PROCESS

Sunstone, subject to approval of the Ashland School District Board, will be the sole judge in determining award of contract and reserves the right to reject any or all Proposals including the requirements and will access applications based on requirements outlined in this RFP. Upon selection of a qualified developer, Sunstone intends to negotiate a development agreement within 45 days of developer selection based on approval of the Ashland School Board of Directors. Although the final scope of work will be negotiated in the executed development agreement, the selected developer shall be responsible for performing the following scope of work which shall include, but not be limited to:

- Develop a plan for the acquisition, at fair market value, of the subject property from the District.
- With the assistance of Sunstone, acquire grants and funding for the development of the Project.
- Obtain all required approvals, permits and entitlements necessary to design, construct, and develop the Project, including necessary infrastructure, in line with the goals described by Sunstone and presented in the Master Plan.
- Develop the design of scope, structural design, design documents as required, design coordination, vendor solicitation, sequencing, scheduling, budgets, including value engineering, and communication for the Project.
- Report to Sunstone on Project status on a regular basis throughout the course of the Project. Prepare and present status reports to Sunstone, any committees, and the District, as applicable.
- Retain architects, construction managers, program managers, project inspectors, and other specialty technical consultants as needed.
- Manage compliance with environmental and other regulatory requirements, as well as with applications for grant or funding sources available for development of affordable housing.
- Develop and maintain an overall cost and schedule reporting system for the Project.
- Review the Project with Sunstone to define and refine the Project scope with Sunstone staff and consultants. Sequence and schedule construction work for the Project with design architects, construction managers, project managers, and Sunstone staff.
- Submit necessary reports to funders, as well as federal, state, and local authorities. Ensure that all other Project participants submit necessary documentation.
- Coordinate and maintain schedules that document the sequence and time frame for the Project.
- Work with Sunstone to develop criteria for residential occupancy, in accordance with applicable law.

SUBMISSION REQUIREMENTS

Developer Prequalification Requirements

It is expected that an interested developer or development team shall meet the following minimum requirements and provide proof of satisfaction of such requirements:

- Developer(s) must have a minimum of five (5) years of experience with single-family and multi-family residential development.
- Developer(s) must have experience negotiating development agreements and navigating through municipal entitlements and incentives, including:
 - Zoning Modifications
 - Planned Unit Developments
 - Tax, grant, and other incentive programs
 - Restrictions on assignment and transfer
- Developer(s) must illustrate recent experience with development of successful residential projects, which include affordable housing projects.
- Developer(s) must demonstrate financial resources and capital accessibility.
 - Developer(s) should provide enough information so Sunstone can determine that the developer has the financial ability to develop the proposed project. The precise information provided should be determined by the developer.
- Developer(s) must indicate experience partnering with public entities on development projects.
- Developer(s) must demonstrate the capacity to meet the overall deadline for the Project considering permitting, marketing and sale/rental of the properties.
- As part of the proposal, the Developer should clearly identify the developer(s), including all members of a team, roles, and background experience of members, including identification of comparable successful projects completed by team members.

Proposal Requirements

Cover Letter:

- Expression of interest in the project. Describe your understanding of the project, public-private partnership and why your firm is interested in participating in the Development Team.
- Statement that the construction team members are licensed and registered in the State of Oregon. That your company will comply with all applicable federal, state, and local laws and regulations.
- Contact information including name, address, phone number and email address of the responsible party.

Comparable Project Experience:

- Descriptions and/or photos of at least three comparable completed projects (completed within the last five years). Describe why these projects are relevant to the work described in this RFP (which could include but is not limited to information regarding size, scope, project complexity, property type, etc.).
- Describe experience working on projects that include aspects of low- and median income housing. Provide experience in constructing preferences housing models
- Describe experience working within local or similarly sized jurisdictions.
- Discuss experience as CM/CG on a team that includes the owner, developer, and architect.

Firm Background:

- Describe your firm's history, including the number of years in continuous operation. Include information regarding size and organizational structure. Include names of all persons with ownership interest in the company and their titles/roles. Include MWESB certification, if available.
- Describe your firm's capabilities, identifying the firm's strengths and special capabilities with regards to scope of work.
- Include information identifying annual volume, financial/bonding capabilities, and stability in the marketplace.
- Indicate whether an ownership or significant leadership position in the organization is currently or has been recently vacant (within the last 10 years).

Key Personnel Experience and Capacity:

- Resumes and anticipated roles of staff likely to be assigned to this project. Describe their relevant experience, responsibilities, and approximate amount of time each will devote to this project during each phase.
- Include a list of other current projects and anticipated timeline that each person is responsible for.
- Provide an organizational structure chart that identifies key personnel and their positions.

Inclusionary Practices:

- Describe the process your company will utilize to meet project requirements for COBID and MWESB/SDVE participation. Describe processes your company utilizes to encourage participation by minority, women, and veteran owned businesses.
- Describe your company's experience in establishing, implementing, and administering an apprenticeship program, training programs, or educational opportunities such as those for Ashland School District students.

Project Approach, including

- Public-Private Partnership Arrangement
- Entitlement Strategy, through Final Planned Unit Development
- Project Financing Plan - See Addendum C
- Relevant data if using a phased approach to the project
- Incentive Requirements, such as any tax, permitting, zoning, financing or other incentives provided by public jurisdiction(s)

- Sales Approach for homeownership including any proposed or anticipated partnership with an established community land trust
- Rental Management, Asset Management and Resident Services Strategy
- Estimated all-inclusive cost range for a development meeting the parameters of the example project provided in this document, see Addendum C
- Concept drawings for proposed project at proposed cost with proposed materials

Average Cost for General Conditions and Overhead and Profit

- Provide a range for cost of General Conditions for similar projects. Include the scope of what is included in general conditions and if they are calculated by project size or duration.
- Provide typical Overhead and profit for comparable projects.

Administration of Work, Project Scheduling and Coordination

- Description of your approach to cost estimating: Provide examples from past projects, including explanation of any major variations in estimates on past projects.
- Briefly describe your strategies to provide constructability and value analysis suggestions to the Project Development Team.

References

- Provide a minimum of three references, preferably from clients on comparable projects. Include a reference from an architect.

Discussion of Project Goals

- Be prepared to discuss project goals as outlined in the RFP and how as the Developer you will support the team in the development of the goals.

RFP PROCEDURES

Schedule for Review and Selection

RFP Issued	November 6th, 2024
Mandatory Pre-proposal Meeting (see note below)	November 12th, 2024 3-5pm
Deadline for Questions/Clarifications (see note below)	November 25th, 2024, 2:00PM
Deadline for Proposals (see note below)	December 2nd, 2024, 10:00AM
Scoring of Proposals	December 2nd- 4th,2024

Interviews (see note below)	December 7th, 2024
Notification of Intent to Award	December 20th, 2024

A MANDATORY Pre-Proposal Meeting and Project Orientation will be held at 3:00 PM on November 12, 2024, at the **Rogue Valley Metaphysical Library Meeting Room, 1757 Ashland Street, Ashland Oregon 97520**. Statements made at the Pre-proposal Meeting will not be binding on Sunstone unless confirmed by written addenda. Potential Developers may obtain additional information about the Project and overall Project goals at this time. ATTENDEES MUST BE SIGNED IN AND PRESENT AT THE PRE-PROPOSAL MEETING BY 3:00 PM TO BE CONSIDERED A PROSPECTIVE DEVELOPER. NO EXCEPTION WILL BE MADE. ACCOMODATIONS CAN BE MADE FOR OUT-OF-TOWN RESPONDERS TO JOIN VIA VIDEO CONFERENCE.

Inquiries for clarification or additional information, if any, must be received by 2:00 PM on November 25, 2024.

Responses must be received by Sunstone no later than 10AM, December 2nd, 2024. Responses submitted after this time will be subject to rejection at Sunstone's discretion.

Developers shall be available for interviews (at Sunstone's sole discretion) on December 7, 2024. No other dates will be held. Interview format is TBD.

Submission Procedure

Proposers shall provide five (5) paper submissions of their response and one (1) electronic copy of their proposal on a flash drive in a sealed envelope. Share file link will also be an acceptable electronic version. Proposers are responsible for confirming receipt of proposals. The following must be marked in the lower right-hand corner of the envelope:

ASHLAND ATTAINABLE HOUSING PROJECT

[PROPOSER'S NAME]

PROPOSER'S ADDRESS]

[PROPOSER'S TELEPHONE NUMBER]

Proposals shall be addressed to:
Sunstone Housing Collaborative (SHC)
1467 Siskiyou Blvd. #79
Ashland, Or 97520

For questions, please contact: Krista Palmer, krista@sunstonehc.org

Each Proposal must be an original copy and signed by an authorized member of the Proposer's firm. Faxed responses will NOT be accepted. Each Proposer is responsible for submission of their Proposal. Proposals or revisions to Proposals received after 10:00 AM local time on Monday, December 2, 2024 may be rejected for consideration by Sunstone. Sunstone is not liable for any delivery delays.

Each Proposer is responsible for all costs incurred (or incurred by others on its behalf) in the preparing or submitting of the Proposal, in otherwise responding to this RFP, or in any negotiation incidental to its Proposal or this RFP.

Proposals submitted early may be modified or withdrawn prior to the submission deadline. Any modified or resubmitted Proposal shall be submitted in the same fashion as required by this RFP. Proposals submitted and not timely modified or withdrawn shall be irrevocable for a minimum period of ninety (90) calendar days following the submission deadline.

Selection Criteria

Eligible proposals will be reviewed by Sunstone Housing Collaborative and merit each of the proposals based on the development team's experience with similar projects, project approach, proposed schedule, and project viability.

Though Sunstone's goal with this Project is to provide affordable housing for the Ashland community, including its employees, Sunstone acknowledges that in compliance with the Educational Instruction Access Act, MCL 123.1041, et seq., NBAS shall not discriminate against educational institutions or private schools by refusing to sell or lease its property to a potential buyer solely because they intend to use the property for lawful educational purposes.

Sunstone will select three finalists, with one recommendation, based on the criteria listed in the selection process. Sunstone will present these finalists at a board meeting to the Ashland School District Board of Directors. The ASD Board of Directors shall vote to approve or deny the selection at the same or subsequent meeting. Upon selection of a successful developer, the Board and the project team will enter into a development agreement.

Appendix A – (PDF Insert) Master Plan

Draft Master Plan

79 Lincoln Street
Ashland, OR 97520



11.04.2024

11.04.2024

Draft Master Plan

Table of Contents:

- I. Introduction
- II. Site Analysis
- III. Community Needs Assessment
- IV. Priorities
- V. Climate Resiliency
- VI. Proposed Program
- VII. Design Overview

Attachments:

- A. Site Analysis
- B. 3D Rendering: Northwest View
- C. 3D Rendering: Northeast View
- D. Site Master Plan

I. Introduction

Ashland School District is experiencing a drop in enrollment, and staff is finding it increasingly difficult to afford to live where they work. Availability of affordable housing has become a primary driver in where people choose to live, particularly households with children. The proposed project at 79 Lincoln Street in Ashland is a housing development facilitated by Sunstone Housing Collaborative. This centrally located development will ensure education and opportunity for the next generation, while providing housing that is accessible and affordable to our neighbors.

Initial master planning efforts are dedicated to creating a welcoming and inclusive living environment that prioritizes accessibility and affordability. The designs described and illustrated in this document are conceptual in nature and are intended to guide future design phases, not dictate them. Furthermore, the timeline of the final master plan deliverable is dependent on additional feedback from user groups and project partners. Included in the draft master plan are approximately 91 dwelling units, offering a diverse range of living spaces from studios to three-bedroom units, catering to various household needs. The development will not only provide homes but also foster community through thoughtfully

planned amenities. These features will include energy-efficient appliances to promote sustainability, communal areas that encourage social interaction among residents, secure bike storage to support active lifestyles, gardens for recreation and education, and on-site childcare facilities to assist working families.

II. Site Analysis (See Exhibit A)

Subject Site: 79 Lincoln Street,
Ashland OR 97520

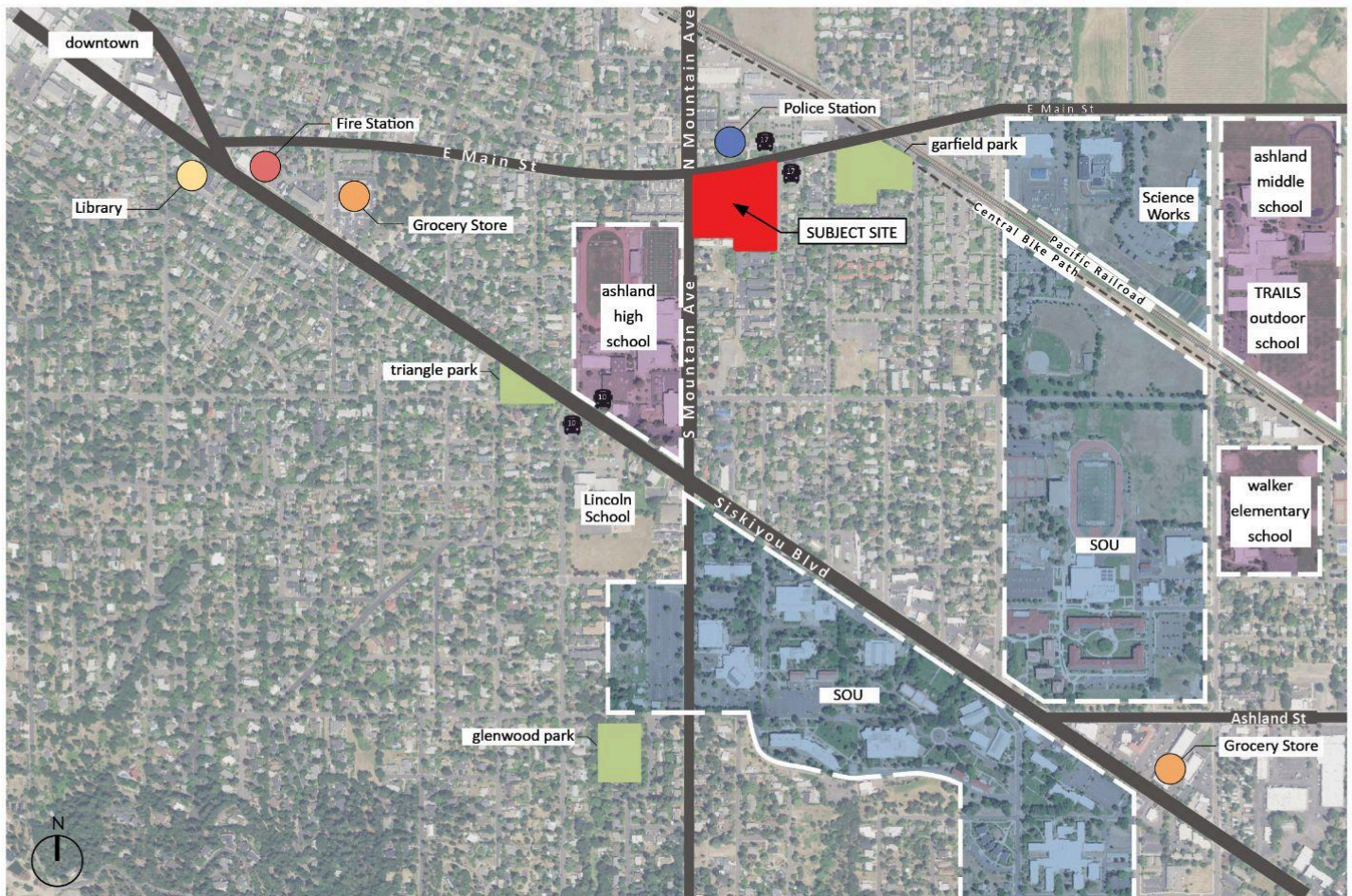
Owner: Ashland School District #5
885 Siskiyou Boulevard
Ashland, OR 97520

Map & Tax Lot #: 39-1E-10-1000

Zoning: R-3 (multiple family)

Overlay Zone: Hillside lands - slopes >25%

Total Acreage: 4.18 AC (182,081 SF)



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

The 4.18-acre property owned by the Ashland School District is located at 79 Lincoln Street within the City of Ashland limits, just 1.1 miles from the Ashland Plaza. The site is bounded by Lincoln Street to the east, N Main Street to the north, S Mountain Avenue to the west, and private residences to the south. Historically, the property has been utilized as a practice field for high school baseball and soccer. It falls under the jurisdiction of the City of Ashland and is zoned R-3, which allows for multiple-family housing. Hillside lands overlay zones exist along the northern and southern boundaries, where slopes exceed 25%, while the interior of the site remains relatively flat.

The property offers a quiet, safe neighborhood environment, with adjacency to the Ashland Police Department, RVTB bus stops, the central bike path, and public schools. The sensory experience of the site features picturesque views of Grizzly Peak and the surrounding foothills. However, it also contends with noise from nearby E Main Street and local sports events at Ashland High School. Mature trees provide some shade along the southern property boundary, while the rest of the site experiences full sun.

Infrastructure on the site includes perimeter fencing, a baseball field, dugouts, a restroom building, and a maintenance shed, along with on-street parking. Pedestrian and vehicle access to the site is primarily from S Mountain and Lincoln. There is a traffic signal located at the intersection of S Mountain and E Main due to high traffic volume. It should be noted that a traffic analysis has not been conducted and consultation with a traffic engineer is recommended to look at vehicle loading on existing roadways and potentially hazardous intersections.

Historically, a pond was located on the site which appears to have been filled to construct the current sports field. As such, the site likely has disturbed soils present of unknown origin given the prior infill construction. A complete geotechnical report and soil analysis with percolation testing is recommended for this project. The current soil composition influences hydrology and drainage patterns, directing sheet surface runoff northward toward the city storm drain system. A City storm drain currently travels beneath the site running south to north. Utilities on site include city of ashland electric, sewer, and water.

In terms of development standards, any new impervious areas will require stormwater treatment in accordance with the RVSS stormwater manual. The R-3 zoning permits a maximum density of 20 dwelling units per acre, with calculations factoring in both the project area and any public land dedicated. A density bonus of up to 60% may be available for features such as conservation housing, common open spaces, and affordable housing. Additional building requirements include a maximum lot coverage of 75% with a minimum of 25% landscape area, defined setbacks of 15 feet in the front, 6 feet on the sides, and 10 feet for corner and rear setbacks, and a maximum allowable building height of 35 feet or 2.5 stories, which can increase to 50 feet with a conditional use permit. This property presents a

significant opportunity for developing accessible, affordable housing that meets community needs while adhering to local regulations and environmental considerations.



Above: Thumbnail view of the attached 'Exhibit A: Site Analysis'

III. Community Needs Assessment: Sunstone User Group Surveys

Prioritizing community engagement and cohesion enriches the planning process and lays the foundation for a successful development that genuinely reflects and serves the needs of its residents. The following data has been collected by Sunstone Housing Collaborative via online surveys distributed to key target user groups. This summary offers some design insights to inform the final master plan document, although additional input will be sought from the community during future phases of master planning and design.

Sunstone Survey #1: Ashland School District Staff

The survey conducted among Ashland School District (ASD) staff gathered input from 55 respondents regarding their housing needs and preferences. The survey revealed that the staff is nearly evenly divided between those living in Ashland and those commuting from outside the city, with all indicating a desire for housing assistance to live comfortably in town.

Walkability and universal access were significant themes, as respondents expressed the desire to walk to work or have convenient commuting options. Proximity to parks and bike paths was mentioned,

along with a need for ADA accessibility, suggesting that ground level homes would be preferable for older staff members.

In terms of outdoor space and pet accommodations, survey respondents showed a strong preference for adequate private backyards or fenced lawns, with six individuals specifically noting this need. Additionally, twelve respondents indicated a desire for pet-friendly properties. Many expressed a preference towards houses with yards, opposed to apartments, if living with animals.

The survey also showed the importance of family-sized housing and diverse layout options, highlighting the importance of spaciousness for families with children. A preference for single-family homes was expressed with a desire for privacy and quality amenities like in-unit laundry, dishwashers, and reliable maintenance. Overall, the feedback showed a preference for high-quality, family-oriented housing solutions that cater to the unique needs of the ASD staff.

Sunstone Survey #2: ODHS Disability Services Advisory Council

The Oregon Department of Human Services (ODHS) Disability Services Advisory Council Housing Survey gathered insight from six respondents, all of whom live with a physical disability. Among the key findings, respondents noted that wheelchair dimensions typically range from 26 to 28 inches in width and 40 to 53 inches in length, with additional length required when seated with feet extended. Five of the six respondents reside outside of Ashland, coming from areas such as Josephine County, Medford, White City, Klamath Falls, and Central Point, while one participant lives in Ashland.

Half of the respondents reported that their current housing costs 30% or less of their monthly income, while the other half indicated otherwise. Similarly, the responses were evenly divided regarding whether their current housing meets their accessibility needs and whether it comfortably accommodates live-in caregivers, roommates, or family members.

When asked about essential qualities in housing, the top priorities identified were affordability, meeting accessibility requirements, being family-friendly, and having reliable utilities. Additionally, desired features in newly constructed housing included adequately sized bathrooms, wider hallways and doorways, and zero-step home entry. Overall, the survey shows the need for affordable, accessible, and family-friendly housing options for individuals living with disabilities.

Sunstone Survey #3: OCDC Participant Families

A survey has gone out to The Oregon Child Development Coalition (OCDC), and responses will be included in the updated master plan.

IV. Priorities

The members of Sunstone Housing Collaborative have articulated a comprehensive set of goals and priorities for the success of the proposed multi-family housing development, highlighting a strong commitment to inclusivity and sustainability.

Most Important:

- Universal Design
- ECE/Infant + Toddler Care Onsite in collaboration with Oregon Child Development Coalition (OCDC)
- Guaranteed Affordability in Perpetuity - Rentals & Homeownership

Important:

- Outdoor Play Area
- Covered Bike Parking
- All Electric Utilities
- Storage/Garage Space
- Truly Mixed Income (Avoiding Siloed Affordable Units)
- Rental Units 60-80% AMI (School Staff, Service Workers)
- Affordable Ownership via Community Land Trust 60-80% AMI & 80-120% AMI

Moderate Importance:

- All Ground Units VISIBLE
- Certain Percentage of Ground Units Max Accessible
- Certain Number of Family-Sized Units Max Accessible
- Reservation of $\pm$ 5 Units (Studio/1BR) for Ashland Supportive Housing for Adults with developmental disabilities (DD)
- Green/Sustainable Building Methods
- Maximum Longevity for Construction Materials
- Community Garden
- Common Indoor Space for Events and Community Resources
- Solar Power
- Rental Units < 60% AMI (Apartments/Cottages for Single Disabled Residents)
- Rental Units 80-120+ AMI (Teachers, Nurses, Dual-Income Families)
- Housing Types: Apartments, Townhomes, Condos, Cottages, Single Family Homes

Lower Importance

- Onsite Property Management

Least Important Goals

- Market Rate Rentals and/or Ownership

V. Climate Resiliency: Design Insights from Ashland's 2017 Climate Energy Action Plan (CEAP)

Noted Ashland School District ("ASD") priorities: improve health and safety, prioritize flexibility and adaptability, standardize facility systems, plan for the future, and be more sustainable and energy efficient.

CEAP Buildings + Energy Section:

- **Building energy efficiency (Strategy BE-2):** improve buildings' energy use through passive heating and cooling
 - Incorporate shade study into building and site design to ensure adequate shade for outdoor common spaces and strategic building design to encourage passive cooling, heat reduction
 - Provide energy-efficient appliances and lighting fixtures for interior design
 - Reduce heat absorption through the use of light-colored materials in hardscape and building design
 - Research solar-powered landscape lighting options
 - Review proposed CEAP strategies to reduce energy efficiency barriers in rent/lease properties as relates to potential Sunstone user demographic (BE-2-3)
 - Work with Ashland's Affordable Housing Program to identify incentives around minimum energy efficiency standards for affordable housing developments. (BE-2-4)
- **Prepare and adapt buildings for a changing climate (Strategy BE-5):** adapt buildings to better withstand climate impacts such as extreme heat and wildfire and protect residents through improved design and functionality
 - Design heat tolerant building approaches such as cool roofs, green roofs, and passive air circulation breezeways. (BE-5-1)
 - Incorporate fire-resilient building materials and landscape design

CEAP Urban Form, Land Use + Transportation Section

- **Support better public transit and ridesharing (Strategy ULT-1):** expand current transportation network for more efficient and convenient rider options
 - Review current bus routes along Main. St and Mountain Ave. for existing bus stop locations and consider commuter access for circulation design.
- **Make Ashland more bike and pedestrian friendly (Strategy ULT-2)**
 - Consider safe biking designations in on-site roadway design
- **Support more efficient vehicles (Strategy ULT-3)**

- Review potential for revised land use codes requiring electric vehicle (EV) charging infrastructure at multifamily developments (Strategy ULT-3-2)
- Consider providing electric charging stations for vehicles, motorized scooters, and wheelchairs on site
- **Support more climate-ready development and land use (Strategy ULT-4)**
 - Review new development regulations as part of the Wildfire Lands Overlay addition to urban growth boundary as the updated overlay may include more urban parts of the city based on recent risk assessments (Strategy ULT-4-3)
 - Promote walkable neighborhoods and infill density in community development plans (Strategy ULT-4-2).
 - Specific features to consider: walking, biking, transit, parking management, and climate adaptation features which support affordable housing and do not increase housing costs.

CEAP Natural Systems Section:

- **Water conservation (Strategy NS-2):** look for opportunities to reuse water and conserve water on-site
 - Provide water-efficient appliances for interior design
 - Optimize drip irrigation for landscaping (NS 2-2) and consider opportunities to reuse greywater on site (NS 2-1)

CEAP Consumption + Materials Management Section:

- **Support sustainable and accessible local production and consumptions (Strategy CM-2):** reduce GHG emissions from shipping in imported goods
 - Expand community garden and urban agriculture (Strategy CM-2-2)
 - Consider opportunities for on-site gardening as well as possible School District and/or SOU Sustainability Department partnership where foods grown on campuses are shared with Sunstone housing development
- **Expand community recycling and composting (Strategy CM-3)**
 - If the multi-family recycling ordinance is updated to encourage more diversion (Strategy CM-3-2), consider sufficient recycling space and universal access on site.

VI. Proposed Program

*As feasible without affecting affordability

**As feasible without affecting the total number of target units on site

Housing:

- approximately 91 dwelling units
- Studio & 1 br units
- 2 & 3 br units (highest target percentage)
- **Shop / storage space (bikes, house projects, equipment, toys)
- *In-unit laundry
- Flexible spaces
- Accessible
- Climate-resilient housing
- Innovative building methods and other sustainability upgrades and features should all be explored (LEED, Earth Advantage, solar, stormwater, greywater, local materials, CEAP standards, Rogue Re-Imagined, Energy Trust)

Shared use and site features:

- Child care, with outdoor play area
- Social services
- Property management adjacent to community space
- Event / meeting space
- Co-working space / open copy-print kiosks
- 25% min. Landscaped area (per City of Ashland Municipal Code)
- Community garden
- Integrated outdoor play areas
- Lawn/Open space
- Dog relief zone
- Stormwater detention
- Flexible Pavilion(s)
- Wildlife considerations
- Open outdoor gym
- Clothes lines

Infrastructure:

- Trash / recycle services
- Solar panels
- Electric car charging
- Electric wheelchair charging
- Technology amenities - landscape light sensitive sensor lights, smart locks and access controls (might help with property management)
- Streamlined access to internet and technology

Vehicles:

- Visitor Car Parking
- Resident Car parking (Approx. 1.25 spaces per unit)
 - *Covered
 - Uncovered

- *Garage
- Bike parking
 - Storage facility
 - Covered
- Emergency vehicle access



Above: Thumbnail view of the attached 'Exhibit D: Site Master Plan'

VII. Design Overview (See Exhibits B, C, D)

This design overview reflects current goals and priorities, however it is not a complete guide. The general ideas are important, but there is room to adapt and shift with specifics.

Housing Types

Unit sizes and types

- Studio Unit
 - minimum 350 Square feet
 - 1 full bathroom

- One Bedroom Unit
 - Minimum 500 Square Feet
 - 1 full bathroom
- Two Bedroom Unit
 - Minimum 900 Square Feet
 - 1 full bath/1 half bath
- Three Bedroom Unit
 - Minimum 1250 Square Feet
 - 1 full bath/1 half bath

Inclusion and equity in design of units

To create a sense of belonging, a study of housing layouts from various cultures that potential users have come from should be performed and incorporated into the proposed designs. Accessible and adaptable units are to be included at ground level of each building based on community need, not minimum regulatory requirements.

Privacy

Careful consideration of window and door placement is an important aspect of the interior design which creates visual privacy between units and common spaces while emphasizing positive viewsheds. Wall thickness, insulation, and window thickness are to be reviewed thoroughly to reduce sound transfer as much as possible.



Above: sample visuals of adaptable floor plan and interior wall concept

Source: Women's Property Initiative Older Women's Housing Project by Studio Bright



Above: Accessible route from parking to front door and from front door to street

Accessibility

As part of a comprehensive approach to accessible circulation, well-marked interior and exterior routes will be provided to meet users' mobility needs. A universal design focus will be implemented in parking, site circulation, shared community spaces, interior circulation areas, and within the dwelling unit floor plans to ensure all residents can comfortably and safely access amenities across the site.

Travel Throughout the Site and Beyond

Multi-modal access should be integrated into the site to encourage walking, bike use, and public transit use. There is potential for shared bike parking, a covered bus stop with a bench, a multi-use path with integrated exercise stations, and accessible pet-walking pathways throughout the site.

Per code, the fire truck hose is a maximum of 150' in length and needs to be able to reach each home and building. A U-shaped driveway has been included to accommodate emergency vehicle access so that all homes can be reached during emergencies. The U-shaped driveway can accommodate an aerial fire apparatus and is 24' in width, to allow for both perpendicular parking and for cars to have enough space to back up. Sidewalks and crosswalks have been considered for pedestrian safety.

Wayfinding throughout the site should include intuitive, legible signage and indicators. This can be done by increased text size, translation in multiple languages, and consistent color coding. Buildings are placed on the perimeter of the site to increase safety and sense of ownership within the core of the site, where open space is prioritized for community use.

Parking

The number of parking spaces is not dictated by local or regional codes, but determined by the number of units proposed, with the goal of having approximately 1.25 parking spaces for every unit. Additional user input, consultation with the City community development department, and a traffic engineer is recommended to determine the appropriate number of parking spaces.



Above: Integrated recreation & play in the landscape

Community Outdoor Space

Accessible landscaping and recreation areas are to be included throughout the site. These amenities could include shaded pavilions with outdoor lighting features, a fenced space for community gardening, expansive turf lawn for sports and community events, an inclusive play space for children of all ages, exercise and wellness zones, an area for dog use, and a flexible outdoor meeting space adjacent to the community room.

Childcare Facilities

Daycare facilities have specific requirements that will need to be met on this project in order to meet local and state regulations.



Above: Pergola with lighting for after-work evening assembly, accessible wheelchair space and a few seating options.



Above: Private patio and balcony standards

Personal Outdoor Space

As noted in the current user survey feedback, access to personal outdoor space is valued by many when considering desired housing attributes. A designated enclosed patio/yard for level 1 units allows residents to enjoy a private space to customize their outdoor needs based on their personal interests. Private balconies should be included for units on levels 2 and 3 for the same intended purpose. Patios and balconies are intended to be at minimum 6' wide and 8' long to allow for a variety of uses.

Technology

To maximize Wifi usage and access throughout the development, Wifi and Data should be installed during construction, before residents move in. Smart home technology can be considered for ground level universally accessible units. Smart plugs, lighting, and locks can be helpful to residents with disabilities or mobility challenges. Electrically operated doors can also be considered for universally accessible units and common spaces. Along outdoor pathways and parking areas, dark sky lighting should be used with automatic dimming settings to reduce light pollution and energy use, while maintaining a safe and inviting environment at night. Within the landscape, smart irrigation systems should be considered with a controller that can adjust watering times based on weather conditions and with the added capacity to identify watering inefficiencies.

Renewable Energy Sources

To lower electric bills and provide a sustainable source of energy, solar panels should be installed on the roofs of residential buildings. Electric-only power is proposed throughout for heating & cooling, hot water heating, and cooking, without the use of natural gas. The concept of zero energy construction could be considered as a way to lower living costs for residents and increase sustainability on site. Zero energy construction proposes an innovative approach to designing for and constructing enough renewable energy on site to be able to meet all on-site energy needs annually.

Stormwater Management

When planning for stormwater management, several effective techniques can enhance water quality and manage runoff. Rain gardens absorb and filter stormwater, while retention ponds provide storage and wildlife habitat. Water quality swales act as natural drainage channels that filter pollutants, and detention areas temporarily hold water to reduce flooding. Proper soil preparation and application of fire-resilient mulch improve infiltration and moisture retention. Incorporating native plants improves biodiversity and reduces maintenance, while permeable pavers allow water to seep through, decreasing runoff. Filtered vegetated parking strips further treat water as it flows, promoting healthier ecosystems.

Efficient and Mindful Design

Holistic design aims to create integrated, sustainable environments by viewing all project elements—buildings, landscaping, water management, and energy systems—as interconnected parts of a larger ecosystem. A user-centric approach ensures the design supports both social and

environmental goals. Additionally, holistic design considers long-term implications, promoting resilience and adaptability to future climate conditions and community needs.

Sustainable Material Choices

- Using locally sourced materials helps decrease transportation-related pollution because these materials don't have to be transported over long distances. Shorter transportation routes mean less fuel consumption and fewer emissions, contributing to a lower overall environmental impact.
- Sustainable insulation materials to consider include:
 - Cellulose: made from recycled materials and requires minimal energy to produce
 - Sheep's wool: a 100% natural product
 - Cork: harvested from cork oak trees without harming the tree
- Identify building materials, paints, and sealants that are low VOC (volatile organic compounds) and non-toxic.
- Incorporate recycled materials such as recycled concrete or brick to use as a fill material or as a base for hardscaping. Reclaimed wood can be used for building finishes and garden beds.
- Utilize renewable building materials, such as bamboo.
- Permeable pavement could be considered to reduce stormwater runoff and increase percolation on site into the groundwater, thus benefiting the plants on site, reducing the need for detention basins, and reducing the impact that the development will have on the City's stormwater system and the Bear Creek watershed.
- Selecting native, firewise, and climate adapted plant varieties in the landscape will reduce the need for excessive irrigation, improve resilient habitat for local wildlife and pollinator species, and reduce long term maintenance costs.

Sustainable Construction Techniques

- Sediment and erosion control measures shall be well planned and implemented.
- Depending on how funding sources come together, the construction process can be broken up into phases. Each phase would be functional on its own, with the idea that it would be part of the whole plan and system once all phases are completed. Project phasing should be chosen based on site access and existing infrastructure.
- Prefabricated or modular buildings are typically more affordable, and create efficiency in the construction process.
- Establish the proposed finish floor elevations of each structure approximate to existing grade to avoid major site grading. This reduces site disturbance, the amount of fuel and labor required, and reduces the addition or removal of earth that goes into grading a site.

Sustainable building design considerations

- Passive solar design can be created by increasing windows on the south side of the units, and creating an overhang of a specific depth to foster an environment where sunlight helps heat the unit in the winter, while shading from sunlight in the summer to reduce heat gain.
- Solar tube skylights are a strategic way to bring in more natural light into the units, and may reduce electricity usage.

Water conservation techniques

- Select plumbing fixtures that maximize water pressure while limiting water usage.
- Utilize a drip irrigation method for plant watering on site.
- Water conservation in the landscape can be improved through identifying drought tolerant planting materials, reducing the size of traditional lawn areas, and providing adequate soil preparation for landscaped areas to reduce the amount of irrigation plants rely on to survive during summer months.

Waste management and Recycling Solutions

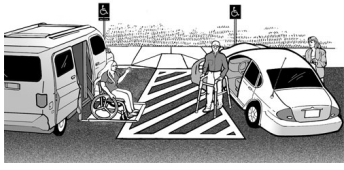
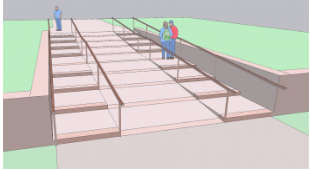
Recology, the local waste management provider, does not have a preference for dumpster versus individual bins. Individual bins should be an option for townhome units, and dumpsters will likely be the primary trash and recycling solution. To promote reuse of materials before recycling, a reuse station could be incorporated into the site, where items like plastic shopping bags, packaging materials, and more could be stored and shared within the community. Additionally, a community-run composting program may be considered either on site or in partnership with an outside organization.

Universal Design

Universal design is an approach for architecture and landscape architecture that creates environments that are accessible and usable for people regardless of their age, ability, cultural background, or status. The resulting design creates spaces that accommodate a wide range of needs, making them universally inclusive. As the proposed Sunstone community is intended to meet the housing needs of a wide range of future residents, adopting a universal design approach to building and site design will help ensure residents are comfortable in both their homes and in accessing the shared site amenities.

Universal design is a priority on level 1, but is not expected to be applied to all levels. The images and parameters included in this section are examples of universal design, not explicit requirements.

Exterior Circulation Design

Parking	Elevation changes	Sidewalks	Entry
			
Min. 96" wide accessible parking spaces with access aisle min. 60" wide, no more than 2.08% slope in all directions with firm, slip resistant surface, and international accessibility symbol sign mounted at least 60" above the ground.	Offer options for different user options. Min. 48" wide ramps and stairs.	Min 6' Sidewalk width. Smooth surface. color and texture guides for directions.	Minimum of 5'x5' clear space in front of exterior door. Covered Entry.
image and text source: https://www.ada.gov/topics/parking/	image and text source: theintertwine.org	image source: flickr.com/photos/8232914@N02/8128451184 information source: planning.org	image source: columbusdesignremodeling.com

Interior Circulation Design

Thresholds	Hallways	Doors	Windows
			
Exterior door threshold no greater than .5". Interior thresholds to be no greater than 0".	Minimum hallway width of 42".	Minimum door width of 36". Hardware that requires minimal effort, lowest cost option is lever handles. To be located 30" - 44" above floor finish grade.	Awning or casement window with crank system to open and close.
image source: udll.com information source: universaldesign.org	image source: homestolove.co information source: simsbuilders.com	image source: kolbewindows.com information source: universaldesign.org INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS	image source: hmota.net information source: hmota.net

Typical Details

Cabinet Hardware	Counter height
	
pull style hardware with more than 13/16" inner projection and more than 3.2" inner length, and no overhangs.	The top of the counter to be between 28" - 34" above finish floor
image source: amerock.com information source: theknobshop.net	information source: ICC_A117.1-09

Kitchen

Sink - Stove - Oven	Fridge - Freezer
	
Kitchen sink and stove to have a 27" minimum clearance in height finish floor surface, and 30" minimum clearance in width. Built in wall type oven with side swinging door to be installed at 27" above finish floor surface.	under the counter pull-out style fridge and freezer.
image source: conceptmobility.co.us information source: ICC_A117.1-09	image source: homedepot.com

Bathroom

Shower	Toilet	Sink
		
Roll-in shower minimum of 36" wide and 60" long. Folding seat and grab bars included. Shower head fixture doubles as a grab bar.	grab bars on either side. toilet/bidet combo.	27" minimum clearance in height from finish floor surface. facing the sink, 48" long x 30" wide clear floor space.
image source: bathing solutions.co.uk information source: INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS	image source: information source: INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS	image source: information source: INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS

Laundry**HVAC**

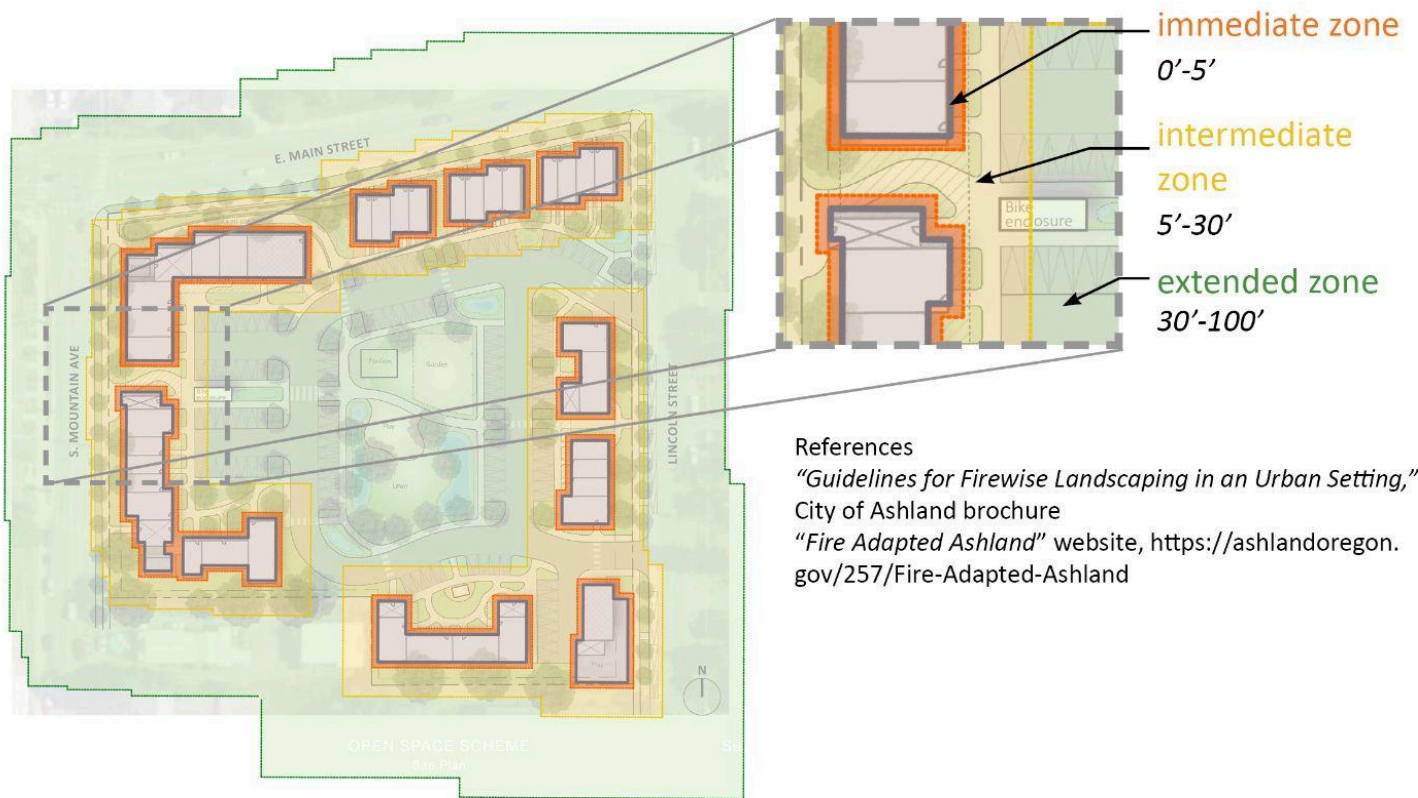
Washer - Dryer	Vent	Heat AC Controls
		
Front loading washer and dryer. raised 6-10" to increase ease of use.	wall mounted return vent for ease of changing vent filter. no taller than 42".	control panel no taller than 42".
image source: pcrichard.com	image source: americanwoodvents.com/	image source: bedbathandbeyond.com

FireWise best practices in site design

The units on site are accessible by fire trucks and emergency vehicles via the proposed 24 ft driveway that also serves as the fire apparatus road running through the site with access from Lincoln Street. This allows for the 150 ft hose line access to the proposed buildings. In addition to meeting all fire and life safety building codes and requirements for emergency egress, best practices for hardening the site and proposed buildings to be more resilient against the future potential of wildfires will be addressed as part of the design's approach to climate adaptation and risk mitigation. As identified in the City of Ashland's CEAP and noted on the site analysis exhibit, the city faces an increased risk of future wildfires encroaching upon urban areas of town, along with an increase in extreme temperatures and flooding. The proposed site design has been adapted to illustrate currently recommended Firewise fuel mitigation zones within 100' of a built structure. The first five feet around a building structure should be maintained as a non-combustible zone designed with resilient landscape materials such as stone, decomposed granite, hardscaping, and fire-resilient groundcovers and shrubs. Strategic landscape design incorporating more fire-resilient plant material will be provided in the intermediate and extended zones on site with proposed trees located to maintain necessary clearance from building eaves and avoid creating ladder fuel conditions with understory planting.



Above: Firewise zones example on site, based on CEAP wildfire planning guidance and Firewise USA best practices



Above: Fuel zone representations indicated on current site layout for further design implementation.

References:

- *The Americans with Disabilities Act (ADA)*. <https://www.ada.gov/>. (n.d.).
- 2017 ICC A117.1 Accessibility Standards
<https://codes.iccsafe.org/content/icca117-12017P4>
- 2010 ADA Standards for Accessible Design
<https://www.ada.gov/assets/pdfs/2010-design-standards.pdf>
- *Ashland Climate and Energy Action Plan*. (2017). City of Ashland.
<https://ashlandoregon.gov/DocumentCenter/View/1735/Climate-and-Energy-Action-Plan-CEAP->
- *Best Practices for Fire Resistant Landscaping*. Fire Adapted Ashland. (n.d.).
<https://ashlandoregon.gov/919/Best-Practices-for-Fire-Resistant-Landsc>
- National Fire Protection Association. (n.d.). *Preparing Homes for Wildfire*. Firewise USA .
<https://www.nfpa.org/education-and-research/wildfire/firewise-usa#preparing-homes-for-wildfire>
- <https://www.earthadvantage.org/climate-friendly-housing/building-certifications.html>
- Oregon Fire Code, 2022 ED. <https://codes.iccsafe.org/content/ORFC2022P1>
- <https://www.usgbc.org/leed/rating-systems/neighborhood-development>
- Rogue Valley Stormwater Quality Design Manual
<https://www.rvss-or.gov/sites/default/files/uploads/rvsqdm-revised-july-2024.pdf>

Appendix B – Demographic Data

Demographic Data

Useful demographic and household data has been included below. This information is based on independent research and US Census data and should be validated by the developer, as needed.

AFFORDABLE HOUSING GUIDELINES								
Income Limits by Family Size: \$/year								
May 2024 - May 2025								
Number of Persons in Family/Anticipated Unit Size								
% AMI	1 Person	2 Persons	3 Persons	4 Persons	5	6	7	8
	Studio/1BR	Studio/1BR/ 2BR	1BR/2BR	2BR/3BR	3BR/4BR			
Extremely Low Income (30%)	\$ 18,450	\$ 21,100	\$ 25,820	\$ 31,200	\$ 36,580	\$ 41,960	\$ 47,340	\$ 52,728
Low Income (50%)	\$ 30,750	\$ 35,150	\$ 39,550	\$ 43,900	\$ 47,450	\$ 50,950	\$ 54,450	\$ 57,958
Income at 60% of Median	\$ 36,400	\$ 41,600	\$ 46,800	\$ 52,000	\$ 56,200	\$ 60,300	\$ 64,500	\$ 68,658
Moderate Income (80%)	\$ 49,200	\$ 56,200	\$ 63,250	\$ 70,250	\$ 75,900	\$ 81,500	\$ 87,150	\$ 92,758
Median Income (100%)	\$ 61,450	\$ 70,200	\$ 79,000	\$ 87,800	\$ 94,800	\$ 101,800	\$ 108,850	\$ 115,908
Income at 120% of Median	\$ 73,750	\$ 84,300	\$ 94,800	\$ 105,350	\$ 113,800	\$ 122,200	\$ 130,650	\$ 139,108

Appendix C – Finance Data

SOURCES & USES OF FINANCING		Residential	Commercial/ Community	TOTAL
SOURCES				
LIHTC Equity				
Permanent Loan				
Public Source A (TBD)				
Public Source B (TBD)				
Developer Equity				
Total Sources		-	-	-
USES				
Acquisition				-
Construction				
Soft Costs				
Financing and Other Costs				
Total Uses		-		-

**ASHLAND CITY COUNCIL
BUSINESS MEETING MINUTES
April 16, 2024.**

I. CALL TO ORDER

Mayor Tonya Graham called the meeting to order at 6:00 pm.

1. Land Acknowledgement**

Councilor Bloom read the land acknowledgement.

II. PLEDGE OF ALLEGIANCE

Councilor Dahle led the pledge of allegiance.

III. ROLL CALL

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

IV. MAYOR'S/CHAIR OF THE COUNCIL ANNOUNCEMENTS/PROCLAMATIONS

Mayor Graham reviewed speaker requests process: to speak at a Council Meeting, please fill out a Speaker Request Form and give to Recorder. Indicate if you wish to speak during the public forum regarding topics not included in the agenda, or to speak regarding an agenda item so you may be brought up at the appropriate time.

V. APPROVAL OF MINUTES ***

- 1.** Minutes of the April 1, 2024 – Study Session Meeting
- 2.** Minutes of April 2, 2024 – Business Meeting

Councilor Bloom/Dahle m/s to approve the minutes.

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

VI. SPECIAL PRESENTATIONS

None

VII. CITY MANAGER REPORT

Lighting near the overpass on Ashland Street will go in next week and related fencing also going in soon. The Timberline Logging project has begun. Utility billing phone lines are open M-F during business hours and the April newsletter is published.

VIII. PUBLIC FORUM (15 minutes – Public input or comment on City business not included on the agenda)

Sitka Moss/Trail – Read words from journalist Bisan Owda regarding her experience in Gaza.

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Amanda Morehouse/Central Point – Referred to the organization Veterans for Peace in articulating violations of human rights in Gaza according to: Foreign Assistance Act; Arms Export Control Act; US War Crimes Act; and Leahy Law. Advocated for a ceasefire in Gaza.

Kira Petiz/Ashland – Urged Council to support the Climate and Clean Air Policy Package.

Piper Banks/Ashland – Urged Council to pass the Climate and Clean Air Policy Package now, and not later, and brought a letter of support from over 30 local and statewide organizations.

Sam Inada/Ashland – Asked for City of Ashland to draft and pass a Resolution for a Ceasefire in Gaza that he read into the record.

Brent Thompson/Ashland–Urged council to consider his last request for a plaque to describe the origins of Siskiyou Blvd acknowledging those that donated the land for it. Recalled past council discussions to defer annexation until 2040/50 and focus on in-fill until then.

Thompson urged the Council to focus on Additional Dwelling Units in existing City boundaries.

Paul Mozina/Ashland – Disagreed with how the 5G Chapter 16 Ordinance process unfolded, and expressed frustration that it did not include public recommendations.

IX. **CONSENT AGENDA**

2. Resolution 2024-09 A Resolution of the City Council of the City of Ashland, Oregon Declaring the Month of April- Distracted Driver Awareness Month
3. Approval of a Sewer Service Connection Use Outside of City Limits, 1348 Ashland Mine Road
4. Liquor License Approval for AJ's Smoke and Grocery Store at 258 A St. Ste. 2
5. Liquor License Approval for The Columbia Hotel at 262 E Main St

Kaplan requested to postpone item one until the next meeting, as he would like to discuss the rate increase and franchise extension separately. McGeary said the resolution could be split into two sections in the council communications to reflect available actions and motions. McGeary said there was a change in ownership at Recology which delayed this discussion. The previous agreement had a start date of April 1, which is why that date was used, and Cotta added the rate increase was implemented April 1, 2024.

Councilor Hyatt/DuQuenne m/s to approve consent agenda with the exception item #1.

Discussion: No Discussion

Roll Call Councilors Hyatt, Bloom, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

1. Resolution 2024-11 Annual Renewal of City's Franchise Agreement with Recology Ashland

Kaplan/Dahle m/s to postpone this item to the next meeting in May.

Discussion: Kaplan spoke he received the terms of the franchise agreement the day prior and would like time to review. Dahle agreed. Hyatt and McGeary clarified contract term language: annual renewals over the next seven years and then re-negotiating the contract, not a seven-year term. Hyatt asked if the City would be in breach of contract if this item was postponed, and McGeary responded not if they wanted to review in good faith rather than

expecting to reject the contract. Kaplan stated that was not his intention. Graham also requested more time.

Roll Call Councilors Hyatt, Bloom, Kaplan, DuQuenne, Dahle, and Hansen, YES. Motion passed.

II. PUBLIC HEARINGS AND ORDINANCES

1. CDBG Awards and Action Plan Development

Brandon Goldman Community Development Director and Linda Reid Housing Program Manager introduced the allocation of the Community Development Block Grants (CDBG), a Housing and Urban Development (HUD) program. Goldman spoke that the City is an Entitlement Community which receives these funds each year for eligible services. The Housing and Human Services Advisory Committee (HHSAC) review the applications and makes recommendations to Council. Reid anticipated an allocation of \$179,575 based on the prior year's allocation. The City received two applications this year: Sunstone Housing Collaborative (SHC) for a capital project, and Maslow Project for a public services funding project. The HHSAC met on March 28, 2024, to review these proposals, and recommended an award to the Maslow Project of \$20,000 with the remaining funds, approximately \$123,660, as a provisional award to SHC. Reid stated that if the funds are not utilized as reserved, then the City may reallocate them in the next fiscal year.

Kaplan asked for clarity on the provisional award for Sunstone. Reid responded that Sunstone still needs to go through the RFP process and select a developer then the City will know what the project is and if it will qualify for CDBG funding. Kaplan asked if this would mean the contract would be awarded and land transferred by February 1, 2025. Reid responded that yes, that is when the City would want to reallocate the funds if the project was not moving forward and there were new applicants. Hyatt asked Reid for affirmation that the various partners involved with the Sunstone project including the Ashland School District, City, and HUD are all on the same page. Reid added that the City is not under contract now, and this provisional process would allow the City time to secure a contract that meets the CDBG requirements before the funds are awarded. Bloom asked for an explanation for the difference between committee recommendation of \$20,000 and the requested amount of \$18,000 for the Maslow award. Reid responded that the Maslow Project has been serving the Ashland community with good outcomes in Ashland schools and could have asked for more funding. The recommendation reflects a desire by the HHSAC to fund this project more fully. Hansen asked if the provisional award to SHC would delay the CBDG funds. Reid spoke it would not. DuQuenne commended Reid on her work, expressed support for both projects discussed, and noted she is no longer on the board of Maslow Project. Graham asked about the 2024 Action Plan included in the packet. Reid responded that the Action Plan is a one-year plan that includes desired outcomes from allocated activities, and ties back to the 5-year Consolidated Plan. As the City approaches the last year of this funding cycle, a Consolidated Annual Performance Evaluation Report outlining what was done each year within the 5-year Consolidated Plan can be utilized to assess any reallocation decisions.

Councilor Hyatt/Bloom m/s to award the competitively available 2024 Community Development Block Grant funds as follows:

\$ 18,000 to the Maslow Project Public Service Project; and

\$125, 660 in a provisional award to Sunstone Housing Collaborative.

Discussion: Hyatt thanked the HHSAC and community partners. Bloom stated he liked the balance between the current need addressed by front line housing and security from Maslow, and long-term housing need addressed with Sunstone.

Councilor Kaplan moved to amend the motion to award Maslow \$2,000 more and Sunstone \$2,000 less.

Hyatt asked if awarding Maslow \$2,000 more would necessitate awarding Sunstone \$2,000 less. Reid responded that it did. Kaplan stated he wanted to acknowledge the Housing and Human Services Advisory Committee's recommendation and move to award those amounts.

No second. Motion to amend the motion fails.

Graham asked for public comment. There was no public comment, and no more discussion.

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

III. UNFINISHED BUSINESS

1. Contract for 2024 Briscoe Floor Replacement & Grant Budget Review

Scott Fleury, Public Works Director, spoke to the Council requesting approval for a contract with Vitus Construction to replace and mitigate about 10,900 square feet of asbestos flooring at Briscoe School in phase one of the project. Fleury also requested to review the grant budget received from the State to discuss next steps. During the public solicitation phase of this project, Vitus Construction was the only responder with a bid of about \$180,000. This leaves approximately \$430,000 of grant funding for a potential phase two of the flooring project and heating ventilation and air conditioning (HVAC) improvements. Fleury reviewed previous discussions about solar panels and the need for significant structural and seismic enhancements to support any installation of solar panels. A structural engineer provided a recommendation for improvement that would support this additional load. Hoag Roofing, the roofing contractor for the roof replacement portion of this project, estimated it would be about an additional \$107,000. Fleury clarified this was not included in the approval Council gave for the roofing portion of this project. Fleury suggested consideration of future facility use and the life of the roof in deciding. Fleury stated most of the HVAC system is at the end of its useful life. Replacement of the HVAC would also require significant upgrades to the electrical system in the building as well as to the City's electrical distribution system to accommodate the additional electrical loads.

Bloom asked about grant compliance in utilizing these grant funds to upgrade the building if later the City wanted to sell the building. Fleury replied that the grant requirements outlined what the funds could be used for, not the duration of occupancy afterwards. The grant does not account for infrastructure changes in the road and electrical distribution. Graham added that Representative Pam Marsh helped bring in the funding for this project and recalled the

intent is to preserve this historic space and to keep it as a school. The roof repair was a clear priority, as was asbestos flooring mitigation, and the HVAC system also. Those estimates were done before the cost escalation over the past few years. DuQuenne asked if the HVAC improvements would be farther down the line. Fleury explained what the HVAC improvement project would include. DuQuenne asked if the \$107,000 for roofing was in preparation for solar panels. Fleury spoke that the expense is to bring the roofing up to current seismic code, which would also be able to support solar panels. DuQuenne stated the importance of bringing the building up to code, while solar panels could be discussed later. Hansen wanted assurance that the asbestos removal would be done in a safe way. Fleury responded that the project manager is working with the Oregon Child Development Coalition (OCDC) who is occupying the building and the contractor to minimize the impact. Based on the initial schedule, work could begin in July and finish mid-September. This includes complete construction phase: floor removal, mitigation, floor and fixture installation, and having all furniture moved back into place. The law requires that a certified asbestos abatement contractor do that work, which Vitus can perform. Hansen asked Fleury how he suggested to incorporate the \$107,000 addition to the roofing project. Fleury responded it could come from the grant by reducing funding for the other upgrades. Hansen asked what the usable life of the roof is, and Fleury recalled it was a 35- or 50-year membrane. Hyatt asked about the current conditions of the flooring tile, and Fleury stated that certain sections have already been replaced by OCDC. He mentioned they are seeing more and more tiles reach the friable stage where mitigation is required. Bloom asked if there was a delay in the project that affects the school, where could the occupants go. Fleury responded that they have had conversations with OCDC and their partners regarding this. Graham mentioned there are discussions underway with Tom McBartlett, Electric Utility Director, regarding other electrical system upgrades needed to supply this specific area and asked if Fleury had discussed addressing the electrical infrastructure needs for this project through that broader Electric Utility Master Planning process. Fleury responded that he would have that conversation with McBartlett. Hansen asked if the plywood addition to the roof would be required regardless of whether solar was added or not. Fleury responded that the improvement needed to meet seismic code would also accommodate the solar array. Fleury spoke that changes in the occupation and use of the building could trigger those code requirements. Hansen asked why this wasn't included in the original bid conversation, and Fleury replied there was not a structural analysis at the time. Bloom asked if the roof upgrade would meet code requirements. Fleury said if additional code requirements are triggered, only wall strength improvements would be needed if the roof is properly done now. Graham clarified the council would take up the two items separately starting with the floor contract.

Councilor Bloom/Hyatt m/s to award a public improvement contract to Vitus Construction for Project No. 2019-27 Briscoe Flooring Replacement in the amount of \$180,990.00.

Discussion: Hyatt spoke she thinks it's important for the health and safety of the people in the building and it is in line with the discussion Council had when the grant was awarded.

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

Fleury asked for staff direction regarding the roof and the added costs. Graham brought up the original intention to improve the building first, and then take up conversations about future use. Fleury said that the Facility Condition Assessment (FCA) being conducted would also provide additional information. Hansen wanted to assure OCDC that the City does not have any plans to change the use of the building in the near future. DuQuenne received clarification from Fleury that the added \$107,000 portion of the roof would bring the roofing portion up to code and would be funded by the grant. Kaplan expressed appreciation for catching the additional need before a 35–50-year roof was put on that might need to be re-done in the future. Graham expressed support for the added sheeting, especially since this is for a seismic upgrade in a school. Graham asked Council for a nod of heads and confirmed that staff direction is to move forward with the roofing improvement. Fleury asked for staff direction regarding the HVAC portion, as well as electrical upgrades including in the street. Hyatt suggested that after the roofing, flooring and related mitigation are complete, that the remaining \$380,000 goes towards the HVAC. Graham confirmed with Fleury that his team would report back after learning more from the Facilities Condition Assessment and Facilities Planning Study.

IV. NEW BUSINESS

2. “If I Were Mayor” Student Contest Winners

Graham spoke about the request for applicants for the “If I Were Mayor” contest last Fall. The Oregon Mayors Association holds this contest every year. Mayors in their localities put out a call that encourages all ages to enter, and winners move on to the State contest. Graham sent our winners on to the State contest, whose awards will be in July. The two winners for 2024 were invited to come up for introduction and try out the Mayor’s chair and gavel.

Avalon Gerk is the middle school winner from Willow Wind. Her submission was an essay that included how to tackle a variety of challenges: from how to best support our unhoused population, to economic development, maintaining parks, and boosting the City’s revenue stream all in one essay. Graham spoke how impressed she was with Gerk’s ability to balance between what is an individual’s responsibility, and what is the community’s responsibility. Ember Richards is the fourth-grade winner from Trails Outdoor School. Richard’s submission was a poster she created. Graham said Richards was able to bring in public safety through reducing wildfire risk, infrastructure improvements including bike lanes and pedestrian safety, and livability improvement with community gardens in new housing developments. Graham spoke about how Richard’s poster portrayed a vibrant, wonderful, and friendly Ashland.

Recess from 7:32 to 7:40.

3. 2023–25 BN Supplement Budget & Resolution–Revenue Recognition & Budget Appropriations for Fire Department

Finance Director Mariane Berry presented a supplemental budget to recognize revenue for the 2023–25 biennium. Berry recognized \$500,000 of interest income earned beyond what was forecasted. This amount was requested to be appropriated towards Ashland Forestlands Climate Adaptation Project for Wildfire Mitigation through the logging project that was

approved at the March 19, 2024, regular business meeting. Berry then recognized \$174,000 as part of the larger Oregon State University grant of \$284,000 awarded to Ashland Fire and Rescue. Schools and childcare centers will receive air quality monitoring technical assistance, training, and interventions for better smoke preparedness. The grant is for \$284,000, but the City is recognizing what it anticipates to expend in the current biennium.

Hansen asked if the remaining balance of \$109,695 could be utilized in the next biennium. Berry confirmed that amount was not expected to be expended this biennium and could be utilized in the next. Graham asked Berry where the interest increase came from, and Berry spoke it was from the accumulation of funds from the previous biennium, and investments in the local government investment pool.

Councilor Dahle/Hansen m/s adopt Resolution 2024-10 authorizing a 2023-25 BN supplemental budget.

Discussion: Dahle and Hansen thanked Berry and her team for their fiscal responsibility.

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

4. Agreement between City of Ashland & Ashland Police Association July 1, 2023-June 30, 2026

Human Resources Director Molly Taylor and Chief of Police Tighe O'Meara presented the agreement, which the Police Association voted unanimously to approve.

DuQuenne asked about the expiration of June 2023 and why it was only now brought to Council. Taylor responded that negotiations take time. O'Meara added that it is typical for contracts to be retroactive. DuQuenne spoke that being proactive is important and inquired further about the specific dollar amount increase. Cotta spoke that the \$72,000 increase in amount was for all positions under the contract for the year. Cotta reminded Council that the City received the Ashland Police Association (APA) letter while under negotiations with the Fire contract. O'Meara explained the negotiations are inherently dependent on both parties and therefore outside of the City's control.

Councilor Bloom/Dahle m/s to approve the three-year contract, ratifying the tentative agreements reached in negotiations with the Ashland Police Association, and authorize the Interim City Manager and Mayor to sign the three-year contract.

Discussion: Bloom expressed appreciation for the hard work of the City's officers who face increasing responsibilities. Dahle wanted O'Meara and the APA to know how proud the Council is regarding the professionalism shown by the department. Dahle spoke about his ride along with the Police and said the empathy the officers showed was astounding. The City of Ashland's Police department is to be commended.

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

Graham asked O'Meara to pass along to his team that the Council appreciates their work.

Graham recused herself from proceedings due to a potential conflict of interest and Hyatt took over as Chair.

5. Affordable Housing Trust Fund Awards

Linda Reid and Echo Fields, HHSAC Chair, presented the item. This year the City offered \$350,000 in Affordable Housing Trust Fund grants. The HHSAC received four applications totaling \$440,000. On March 25, 2024, the HHSAC conducted a public hearing, evaluated the grant applications, and made award recommendations. HHSAC and staff recommendations are consistent. The applicants were:

- Ashland Community Land Trust Organizing Committee (ACLTOC) to establish a community land trust in Ashland for \$40,000.
- Habitat for Humanity of Rogue Valley (HHRV) for land acquisition to development affordable home ownership units for \$100,000.
- Opportunities for Housing Resources and Assistance (OHRA) for resource navigation to assist homeless population to attain housing for \$200,000.
- Sunstone Housing Collaborative (SHC) towards land acquisition for \$100,000.

Reid said HHSAC and staff recommendation is: \$40,000 to ACLTOC, \$100,000 to HHRV, \$155,000 to OHRA, and \$55,000 to SHC.

Bloom asked why SHC was awarded half of what was requested. Fields said SHC did not yet have a letter of agreement with the school district about the property, nor had they selected a developer. The committee also considered that the SHC applied for three funding sources and received funding from all three. Bloom asked if there was a representative from SHC present. Kristal Palmer, the Executive Director of SHC approached the Council. She spoke SHC is in the final stages of developing an RFP in conjunction with the school district's contractor. Bloom asked about previous discussions regarding earlier projected timelines, and Palmer clarified those were hopeful timelines based on RFPs going out early Spring. Hansen thanked Palmer and asked for a quick description of the project. Palmer responded that SHC looked at best practices from other developments in other states which included school districts. One important criterion is to have an integrated community of mixed income units that are indistinguishable from one another. Palmer expects a combination of townhomes, single family units, and apartments. Bloom asked Palmer whether a higher award amount would assist SHC in maintaining projected timelines, and Palmer indicated no. Kaplan asked Reid about the lack of provisional wording in this award and Reid confirmed that wording was not needed. Hansen asked about the source of this funding, and Reid responded it was from the marijuana tax funding dedicated in 2018 to the Housing Trust Fund account which is in the general fund.

Councilor Hansen/Kaplan m/s to award the 2024 Affordable Housing Trust funds as follows:

- **\$40,000 to Ashland Community Land Trust Organizing Committee**
- **\$100,000 to Habitat Housing Proposal**
- **\$155,000 to OHRA**
- **\$55,000 to Sunstone Housing Collective**

Discussion: Hansen spoke that all the awards represent one of the council's highest priorities of affordable housing and livability. Kaplan thanked the HHSAC for their work.

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

Mayor Graham rejoined the meeting.

6. Social Service Grant Awards

Reid mentioned the City has traditionally granted social service grant funding every other year. Two years ago, it was changed to once for the biennium. For the biennium, an award total of \$134,000 was offered either in full, or to be split, with half given each year. The Committee received 12 applications totaling over \$300,000 for this funding stream. HHSAC reviewed the applications on February 22, 2024, and made their recommendation. Hyatt asked if the recommended award structure allows the awarded organizations the ability to meet their missions. Fields spoke the recommended awards are meaningful amounts for small organizations and those with additional income streams. Reid added that smaller grants with less restrictions are better able to help community organizations. Hyatt spoke about the mental health and substance use treatment services that La Clinica will bring online. Graham asked about streamlining the process moving forward to reduce administration costs. Reid reviewed the history of the process which is now more streamlined, and Reid can more actively assist applicants.

Councilor DuQuenne/Kaplan m/s to accept the Housing and Human Services Advisory Committee's award recommendations allocating the social service grant funds as follows:

- Ashland Emergency Food Bank \$4,333
- Ashland Food Angels \$10,667
- Community Works Inc. (Dunn House) \$8,000
- RVCOC- Food and Friends \$6,333
- Jackson County SART \$6,667
- La Clinica \$13,333
- OHRA \$34,333
- Peace House \$12,500
- Southern Oregon Jobs with Justice \$11,667
- Sunstone Housing Collaborative \$7,500
- St. Vincent De Paul \$13,333
- United Way \$5,333

Discussion: DuQuenne, Kaplan, and Graham thanked the HHSAC

Roll Call: DuQuenne, Hansen, Dahle, Bloom, Kaplan, and Hyatt. **YES. Motion passed.**

V. RESOLUTIONS AND CONTRACTS

7. Resolution 2024-12 Approving a Jackson County Order to Initiate Formation of Jackson County Animal Control Service District

Dave Dotterer, Jackson County Commissioner and Ashland resident asked for support to enable the citizens of Ashland to participate in the new Jackson County Animal Control Service District. The request is to pass a resolution to include the City in the territory of the district if the voters approve of the measure in November. Dotterer emphasized the animal control program is primarily for the safety and well-being of the citizens. The shelter has been using one-time funding, but without long-term stable funding they will need to reduce the Animal Control Program. Stacy Brubaker, Director of Jackson County Health and Human Services provided a power point presentation (see attached).

City Council Business Meeting

April 16, 2024

Page 9 of 11

Bloom asked for clarification that the request is for capital funding rather than operational funds. Joel Benton Senior Deputy County Administrator and County Counsel clarified the request is for both. Bloom asked about funding services that taxpayers already expect to receive, and about the County's contingency fund. Benton spoke that citizens are used to a level of service above what is required by the County, but funds to do so are depleted. Long-term stable funding afforded by a tax district would allow the current level of service to continue. If the measure fails, there are short-term options such a 5- or 10-year levy for capital improvements, but this would not help with long-term operational needs. Benton spoke about the County's contingency fund and articulated the various ways it was already provisionally allocated which left about 20 million unallocated. Hyatt asked if there was a schedule for public engagement and why a service district where the control remains with the County was selected instead of a special district which would have its own board. Benton spoke that the presentation to municipalities is the beginning of the community engagement piece. He added the County currently has the obligation as the dog control authority which cannot be passed onto a special district, even if a special district to run an animal shelter was formed. Hyatt asked if it was possible to contract with a third-party entity to provide the extra services needed. Benton responded that while it is possible to contract with a third party, the county would still be under obligation as the dog control authority. Dahle asked how the public was involved if they were already bringing a proposal. Benton spoke the responsibility of the County was to come up with a funding plan to put to voters, who would then be able to weigh in. Kaplan asked about financials, specifically the debt service and interest rate for the bond. Benton would reach out to finance for an answer. Kaplan asked for clarification regarding the County's contribution that he did not see on the pro forma kicking in until year six. Benton clarified if this measure passes the county contribution would continue to support the program as it is already running, while the financials were about funding the capital project. Benton spoke if the measure passed in November of 2024, the County would not collect revenue until November of 2025. Kaplan inquired further and Benton could bring back a clearer financial picture to Council. DuQuenne spoke this has been on the County's Capital Improvement Program (CIP) list for the past 18 years and asked if they had presented to all 11 municipalities during this time. Benton responded that Ashland is the sixth and listed off the other presentations. DuQuenne asked about public input in formulating options such as the service district vs special district and any alternatives for transparency. Brubaker spoke that during the two years in her position, she has had ongoing conversations with multiple individuals and agencies to bring a feasibility study to the Board of Commissioners. The Board decided they wanted to put forward a service district. DuQuenne inquired further about County obligation, and Benton clarified the obligation is dog control, and having an animal shelter allows them to serve that function when dogs need to be impounded.

Public Comment

Denise Krause/Ashland – Krause stated on February 29, 2024, the Jackson County Administrator updated Commissioners on overdue capital projects and stated many of those projects were not public facing including the animal shelter. On March 26, 2024, the County

Administrator unveiled a proposal for a perpetual service district. There was no public involvement in the planning process. Krause asked that alternatives be considered and publicly discussed. There is a public forum scheduled to discuss this and other options at the Medford library on April 23, 2024, and urged Councilors to wait.

Jeanne Chouard/Ashland – Chouard spoke that the County skipped the public input portion of this and was pushing a service district on the taxpayers. Chouard urged the Council to table this resolution and asked the County to engage participation from all stakeholders.

Hyatt asked about current capacity and the responsibility the County has for Animal Control and how often the shelter is faced with the need to euthanize animals. Brubaker spoke in her two years in the position, the last two weeks were the first time that the County reached capacity and had to make decisions regarding euthanasia. Graham asked about the more expensive facility without additional capacity. Brubaker clarified there would be increased capacity but that was not the primary aim and did not know what the additional capacity would be until funding was secured. Kapan asked what would happen if Ashland voters said no, and Benton clarified that the process of presenting to municipalities will help the County Commissioners know if they will have enough tax dollars to for a service district. Graham opened the floor for a motion. No motion was made. Graham thanked the County representatives for coming. Cotta inquired if there was interest in taking this item back up at a date certain in the future. Graham polled the Councilors, and none had interest in taking this item back up in its current format.

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

Council liaison discussion was tabled until the next meeting due to time.

VII. ADJOURNMENT OF BUSINESS MEETING

Meeting adjourned at 9:30 pm.

Respectfully Submitted by:



City Recorder Alissa Kolodzinski

Attest:



Mayor Tonya Graham

Jackson County Animal Control Service District



2024

1

Only Publicly Operated Animal Shelter in Jackson County



- Operated by Jackson County
- Animal Control for dogs is a function of Jackson County pursuant to Chapter 609 of the Oregon Revised Statutes
- At times, authorized to impound a dog
- Impounding a dog requires an animal shelter which meets the needs of the community and the animals in the care of the County at the animal shelter
- There is no provision that requires the County to provide services for cats or other animals

2

Current Facility:

Located at 5595 South Pacific Hwy, Talent



3

Current Facility:

- Built prior to 1975
- Original capacity for 14 dogs
- Expanded to an additional 16 dogs and office space in 1975
- In 1991, current space was expanded again adding capacity for 25 additional dogs, bringing total to 55
- Today the current kennel capacity at the shelter is 86 , with dogs having to be housed in crates along hallways when shelter exceeds capacity



4



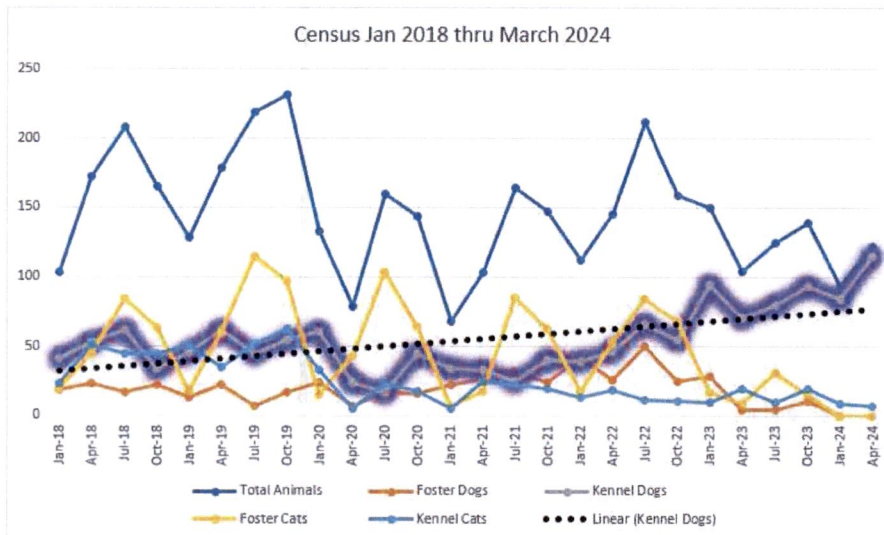
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When Over Capacity

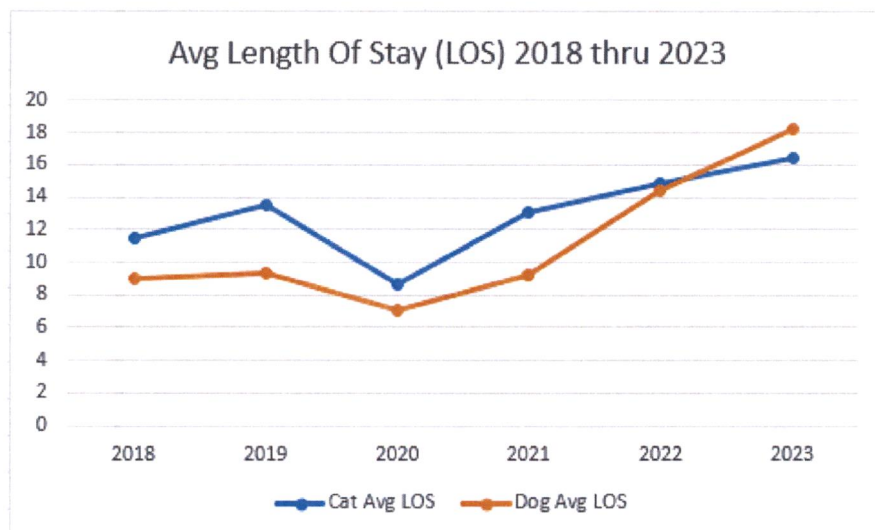


6

Statistics



7



8

Animals Held as Evidence:

- Jackson County currently receives and holds both dogs and cats for various jurisdictions when they are seized as evidence for a criminal matter
- These animals often remain at the shelter for long periods of time for a variety of reasons:
- The cost of care for these animals is covered by the County currently as the defendants do not typically have the means to pay, even when it is put in as part of court findings



9

"WHY NOW?"



- The current Animal Shelter has no longer meets the needs of Jackson County and the public for the care and custody of dogs and other animals, including cats
- The current shelter has reached its capacity to be renovated, remodeled, and expanded to accommodate the needs for the housing and care of dogs and other animals, including cats
- After a deep review and revamping of the program over the past two years, County Administration is ready to move forward, with the building of a new shelter that is able to meet the current needs of our county population and allows for the implementation of best practices for shelter operations and animal care

10

This is not “new” or “all of a sudden”

Jackson County officially started a conceptual design with a signed contract with a local architect on August 31, 2021.

The current conceptual drawing is one of many as we have continued to learn more about running an up to date shelter, and there will many more iterations to come.

Eventually, if we move forward with the building of a new shelter, there will be an entire design team and an effort to reach out for public and partner input.

In the past year there have been more than ten articles in the Rogue Valley Times in relation to the feasibility study and the building of a new shelter. A few quotes are listed on the next slides

11

This is not “new” or “all of a sudden”

February 3, 2023

"Jordan said he has been working on plans to build a new animal shelter since he started as administrator in 2006, and he said plans are in the works for a new facility as part of a feasibility study."

March 24, 2023 – OUR VIEW

"As the study into what a future shelter will look like is conducted, we suggest it's time to rein in the rhetoric and remember that all parties involved have the same priorities."

12

This is not “new” or “all of a sudden”

June 13, 2023

“County officials made a handful of changes at the animal shelter last year, including a volunteer-free day so shelter staff could deep clean, complete evaluations and work on a feasibility study to determine future changes to the aging shelter.”

December 12, 2023 –

“A study is underway to determine the cost of doing business and the feasibility of replacing the shelter originally built in 1961.”

13

Current Cost of the Animal Shelter

- Revenue currently received from performing dog control functions is insufficient to properly construct, maintain and operate animal control services
- Revenue currently generated \$636,255 per year, as of fiscal year 2022-2023 through various fees
- Expenses of \$2,194,219 per year, as of fiscal year 2022-2023
- 2014-2015 and prior the shelter was funded through a bequest from the Beebee Funds
- 2014-2015 \$0 from GF, as of 2024-2025 \$1,200,000 GF
- Additional revenue is received from other sources, including temporarily supplemental, one-time general fund, non-operating reserves
- These existing sources of revenue are simply insufficient and not sustainable over time

14

What has changed?

- Changes in laws related to the use of criminal justice individuals for manual labor
- Creation of new positions and the hiring, training and retaining of additional staff
- Consistently being over capacity has limited ability for accepting and caring for cats



15

"The Ask" of Cities/Municipalities

- Jackson County Board of Commissioners are asking that the eleven cities/ municipalities support the creation of the Jackson County Animal Service District under the authority of Oregon Revised Statute (ORS) 451.010(1)(q) by passing resolutions approving the inclusion of the city in the "District"
- The new district would have the authority to construct, maintain, and operate an animal care and control service facility
- Specifically a new Animal Shelter for the housing and care of dogs and other animals including cats
- Voters will be asked to establish a permanent property tax rate limit of 15 cents per \$1,000 of assessed value for the District
- The District will have the authority to levy and collect general property taxes up to the approved rate limit

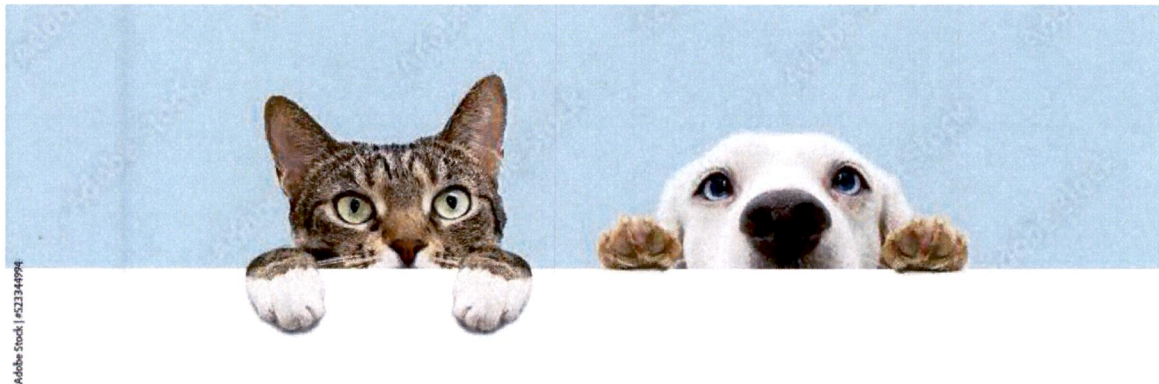
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Median Real Market Value and Assessed Value



Area	Median RMV	Median AV	Proposed \$.15 Per/1000 AV
Ashland	\$ 546,600	\$ 313,850	\$ 47.08
Butte Falls	\$ 212,430	\$ 104,410	\$ 15.66
Central Point	\$ 365,875	\$ 199,980	\$ 30.00
Eagle Point	\$ 420,200	\$ 215,445	\$ 32.32
Gold Hill	\$ 269,700	\$ 149,580	\$ 22.44
Jacksonville	\$ 622,710	\$ 330,230	\$ 49.53
Medford	\$ 384,550	\$ 212,000	\$ 31.80
Phoenix	\$ 369,350	\$ 199,240	\$ 29.89
Rogue River	\$ 332,075	\$ 178,595	\$ 26.79
Shady Cove	\$ 388,970	\$ 209,710	\$ 31.46
Talent	\$ 353,165	\$ 210,205	\$ 31.53
Unincorporated	\$ 420,545	\$ 229,750	\$ 34.46

17



Adobe Stock | #523344994

*The will of the
Jackson County Citizens
to fund an
Animal Control Service District
to pay for the new facility
and the cost of the ongoing services
will determine the scope of the project*

18

If the district is passes...

- Construction of the new facility, \$15 million (approx.)
- With an anticipated additional 3.5 million in revenue and combined with continued general fund support to provide for debt service, operations and maintenance of the shelter
- Should the effort pass than the County would build enough space and plan to serve both cats and dogs



19

Should the District fail...

- Consideration will be given to construct a reduced facility footprint with reduced operational and program offerings to the extent possible, with not guarantee that it can proceed.
- Shelter would be designed for dogs only
- County would relook at current fee structure and make recommended changes to fees for municipalities that are currently offered without cost

20

The Vision...



- Total Projected Capital Cost \$15 Million
- Total annual budget year four (built, open and operational) including debt service and operations is approximately \$6,347,849

Operations \$4,082,741
(includes \$400,000 for onsite vet services and \$600,000 for enforcement activities)

Debt Service \$2,265,108
(eliminated after year 10-general fund to fill the gap – which is not sustainable)

- Tax collected year four is approximately \$4,087,578

21

PROJECTIONS, PROJECTIONS, PROJECTIONS

- All you are about to see are projections, estimates, best guesses:
 - ✓ Not intended to necessarily increase a great deal of capacity
 - ✓ Increase efficiency so that we can better house and care for our current population
 - ✓ Example: Spay and neuter's currently move slowly which lowers our churn.
 - ✓ Find opportunities to increase the adoption rate to move animals through faster
- Once we have the go ahead for a new shelter we will start an official process of:
 - ✓ Hiring an architect
 - ✓ Creating a design team
 - ✓ Get input from professionals
 - ✓ Community partner participation
 - ✓ True numbers of kennels, based on the information we have at the time

22

New Location

SW Corner Grumman Drive and Kingsley Drive, Medford



23



24

Questions???



Council Business Meeting

Date: December 3, 2024

Agenda Item	Council Adoption of 2200 Ashland Street Master Plan
From	Sabrina Cotta
Contact	sabrina.cotta@ashland.or.us

SUMMARY

City Council appointed an Ad hoc Committee to develop a Master Plan. The Committee began its work in June 2024 and presented to City Council at the December 3, 2024 Study Session.

POLICIES, PLANS & GOALS SUPPORTED

Belonging through mutual respect and openness, inclusion and equity. Regional cooperation including support for public safety and homelessness. Respect for the citizens we serve, for each other and for the work we do. Excellence in governance and City services.

BACKGROUND AND ADDITIONAL INFORMATION

Mission: Create a long-term master plan for the building and surrounding property at 2200 Ashland Street that aligns with contractual obligations, furthers the community's goals regarding homeless services and affordable housing, and enhances the experience of the surrounding neighborhood.

Goal: Identify the best use(s) of this City-owned property to further the goals identified by the community and state funding partners.

- Regional cooperation, including in support for public safety and homelessness
- Community affordability, including in available housing and childcare
- Belonging through mutual respect and openness, inclusion and equity
- Quality of life that underpins the City's economic vibrancy
- Environmental resilience, including addressing climate change and ecosystem conservation

Committee Charge

Discovery Phase: Develop a shared understanding of:

- current needs regarding homeless services, transitional housing, and affordable
- housing related to regional efforts;
- current economic challenges related to workforce housing;
- existing conditions and challenges in the surrounding neighborhood;
- contractual obligations that must be met on the property;
- development limitations due to zoning or other land use regulations; and
- the City Council's commitment to climate change mitigation.

Options Development Phase: Investigate traditional and innovative solutions to the challenges identified in the Discovery Phase.

- Identify viable use options for the property and configurations of those options





Council Business Meeting

- Host two community engagement events - the first focused on possibilities for the site and the second focused on feedback regarding the initial draft master plan and host two online surveys through the City's website in conjunction with these events
- Develop a draft master plan

Final Recommendation Phase: Finalize the draft master plan and present to Council for approval

- Share draft master plan with the community and integrate feedback into final draft
- Present final master plan recommendations to City Council for consideration and possible approval

Scope of Authority: The 2200 Ashland Street Master Plan Ad Hoc Committee will develop a proposed Master Plan for the facility and site and deliver it to the Ashland City Council. It will follow all standard public meetings and ethics regulations.

Staff comments regarding the proposed master plan:

The proposed limitations within this report designed to mitigate impacts on the surrounding area ensuring a well-managed facility may have unintended consequences, such as limiting the flexibility of both the City and any potential service providers to adapt to evolving service needs, deterring potential providers and reducing future eligibility for State and Federal funding programs.

- The term shall indicates a requirement for the City to move forward to act on this plan, which is premature without identification of funding and service providers. (Staff recommendation: Remove the word shall).
- Prohibiting drop-in services and requiring appointments can limit access for individuals experiencing urgent needs, reducing flexibility to adapt to changing demand or emergency scenarios and can be viewed as discriminatory. (Staff recommendation: State a preference for appointment based services instead of a moratorium on drop-in services.)
- The restriction to serve only individuals moving toward self-sufficiency limits the ability of the site to adapt to crises requiring broader services. The stipulations, such as requiring that all clients take steps toward self-sufficiency and excluding high-needs individuals (e.g., those in active addiction or with severe mental health disorders), may disqualify service providers that typically cater to broader populations. (Staff recommendation: State a preference for services for those moving toward self-sufficiency.)
- Providers may need to comply with City imposed specific behavioral contracts, pre-registration requirements, and detailed evaluation protocols, which could deter smaller organizations or those with their own robust administrative requirements. (Staff recommendation: Remove this requirement and allow the City to develop contracts with standard requirements).
- State and Federal homeless assistance programs often require inclusivity of high-needs populations and low-barrier access. The site's restrictions on certain populations and uses may disqualify it from these funding sources. (Staff recommendation: Remove the restriction on high-needs populations and low-barrier access.)
- The requirement for all services to complement but not duplicate others may lead to underutilization if clear partnerships and boundaries with other providers are not established. (Staff recommendation: Remove the requirement of non-duplication).
- The call for planting of trees is cost prohibitive as a temporary measure, and most likely would need to be removed and new landscaping installed once housing is developed. Weekly maintenance is potentially excessive depending on the final utilization of the space as well as requires funding





Council Business Meeting

which potentially pulls funds away from needed repairs, upgrades or services. (Staff recommendation: Acknowledge the need for appropriate landscaping when all construction on the site is complete and remove weekly maintenance requirement).

- The requirement to provide visually appealing screening of outdoor recycling or garbage bins is a requirement outside the normal requirement of businesses and residents within the City limits. (Staff recommendation: Remove from report).
- Site management done by a group of citizens sets a precedent for the City moving forward that could prohibit the City from moving forward on needed initiatives. A more appropriate venue for site management or provider concerns would be to join a service provider board or volunteer with a service provider organization. (Staff recommendation: Remove from the report).

FISCAL IMPACTS

Cost for ad hoc report: \$26,000 (staff plus consultant time).

Additional costs: Unknown pending design and identification of funding. CDBG capital funds (5 years worth) have been allocated by the Council (November 19, 2024) to fund capital needs for converting the building to a severe weather shelter.

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move to adopt the 2200 Ashland Street Master Plan.

I move to adopt the 2200 Ashland Street Master Plan with the following edits.....

REFERENCES & ATTACHMENTS

1. 2200 Ashland St. Master Plan Ad hoc Committee Report - approved by committee 11.12.24

TO: Ashland City Council
FROM: 2200 Ashland St. Master Plan Ad hoc Committee
DATE: November 12, 2024
SUBJECT: **2200 Ashland St. Master Plan Recommendations**

The Committee

City Council appointed the 2200 Ashland St. Master Plan Ad hoc Committee to develop a Master Plan, which can serve as the basis for cost estimates and as a tool to leverage new funding for renovations and operations. The Committee was comprised of neighbors, people who have lived experienced with homelessness, advocates, and three non-voting members of City Council.

Jason Houk	Member
Rachel Jones	Member
Matthew McMillan	Member
Debbie Neisewander	Member
Avram Sacks	Member
Trina Sanford	Member
Allison Wildman	Member
Tonya Graham, Mayor	Non-voting Member
Gina DuQuenne, City Councilor	Non-voting Member
Bob Kaplan, City Councilor	Non-voting Member

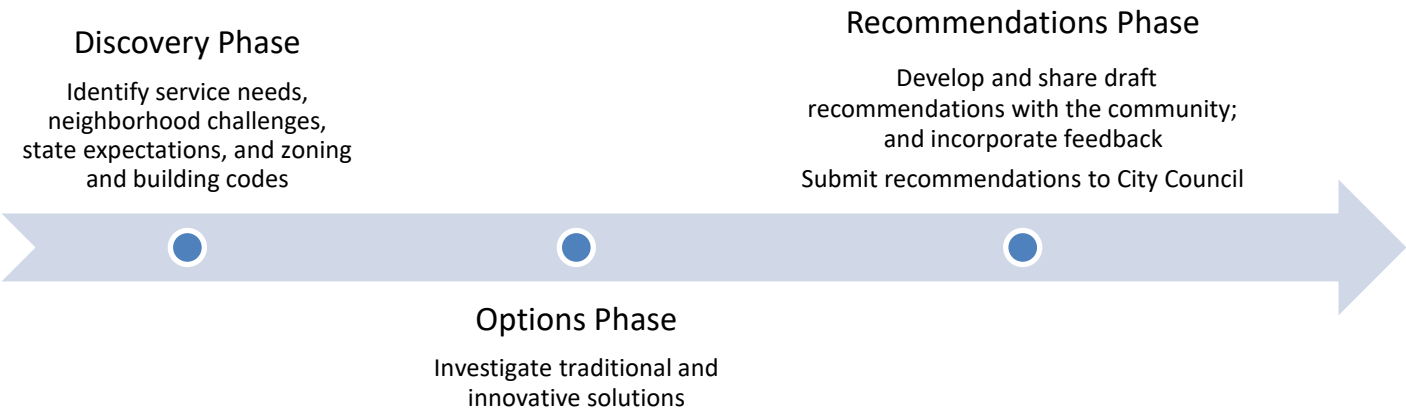
The Charge

The Committee’s charge was to develop a master plan for the use of the 2200 Ashland St. property that

- 1. provides services to people experiencing homelessness,
- 2. furthers the community’s goals regarding homeless services and affordable housing,
- 3. enhances the experience of the surrounding area.

The Timeline

The Committee began its work in June 2024 and concludes with this report presented for a City Council Study Session on November 18 and Council action on December 3, 2024.



The Role of the 2200 Ashland St. Master Plan

Having a property master plan is the foundation for

- Prioritizing site use
- Detailed facility design, for which cost estimates can be determined, and
- Seeking funding for site improvements and program operations.

All three steps above (prioritizing, designing, and funding) will take time, and thus mean a phased approach to implementing services.

Some components of the master plan will be immediate. For example, the site will continue to be used as a Severe Weather/Smoke Shelter, and it will be available as a community space in case of emergencies. These pre-determined uses are incorporated into the master plan and supported within the current City Budget.

The Limitations of the 2200 Ashland St. Master Plan

The 2200 Ashland St. Master Plan is only a small part of what is needed to address and prevent homelessness in Ashland and the surrounding region. **The need is much greater than can be met on this property.**

The services described in the 2200 Ashland St. Master Plan are intended to complement and not duplicate or compete with other services, as each plays a different role in addressing community needs.

Acknowledging the Challenges

As individuals, families, and interconnected sectors of the greater Ashland community, we recognize that the condition we call “homelessness” has many challenges. It is through the transparent examination of steps – and mis-steps – that the 2200 Ashland St. Master Plan Ad hoc Committee believes well-planned and well-managed efforts can create positive outcomes for everyone.

The Recommendations

The recommendations from the 2200 Ashland St. Master Plan Ad hoc Committee are based on the committee’s understanding of the directive to produce a Master Plan that

- Serves people experiencing homelessness, beyond just a severe weather shelter
- Does not foster negative impacts on the surrounding area

Attached, please find the Ad hoc Committee recommendations for 2200 Ashland St. **Site Use** (pgs. 3-4) and **Site Management** (pg. 5), as well as **Other Considerations** (pg. 6).

2200 Ashland St. Site Use

A. Severe Weather/Smoke Shelter

2200 Ashland St. shall be used to provide safe and secure shelter from severe weather and smoke, along with adequate storage for personal belongings. Persons shall abide by City-approved rules and be allowed to access the service without an appointment.

The Severe Weather/Smoke Shelter shall be prioritized for facility improvements to eliminate barriers to providing this essential service.

B. Indoor Day Services by Appointment

Except for the Severe Weather/Smoke Shelter, any services provided on site shall be by appointment or pre-registration. The following indoor, daytime, by-appointment services are appropriate to be provided at this property:

1. Offices for social service providers to meet with clients
2. Laundry
3. Showers
4. Day storage

C. Transitional Housing

The property is appropriate to help meet the need for Transitional Housing, including Bridge Housing, as defined below:

- Transitional Housing provides up to 24 months of training, counseling, and support for clients to then move into a subsidized housing program with ongoing case management or housing without subsidy.
- Bridge Housing provides short-term housing for individuals who can be self-sufficient (e.g., they have a housing voucher or are enrolled in a subsidized housing program) but are seeking a rental unit.

The following facilities are appropriate for Transitional/Bridge Housing at the site.

1. Boarding Rooms in the existing building.
2. Tiny Home Village, where individuals or couples can reside in self-contained tiny homes, complete with bathrooms and kitchens.
3. Multi-floor Efficiency Apartments, also for individuals or couples, but making for more efficient use of the space.



D. Space for Training and Meetings

The site shall allow scheduling of appropriate space for training and meetings related to housing and homeless services.

E. Administrative Offices

The site shall allow for a limited number of office spaces for administrative use by organizations addressing housing and homeless services.

F. Maintenance

The property shall be fenced and well-maintained. The detailed Facility Plan shall include placement of additional trees, as well as upgraded fire-safe landscaping. Continuous weed abatement and weekly maintenance shall ensure that the property is visually appealing, in keeping with the standards of other City buildings and properties.

G. Amenities

The property shall include a multipurpose space, that can be used for classes and meetings, as well as activities in response to a community emergency (e.g., flood, fire, earthquake).

The site shall include an adequate number of indoor restrooms to meet the needs for use, including the needs of participants at the Severe Weather/Smoke Shelter.

Other amenities shall include bicycle racks, visually appealing screening of any outdoor recycling or garbage bins (enclosed and locked), informational signage, and low-impact night lighting to be continuously illuminated. In addition, the City of Ashland shall improve or replace the dilapidated shed attached to the west side of the building.

H. Prohibited Uses

Except for the Severe Weather/Smoke Shelter, the 2200 Ashland St. Master Plan for Site Use shall not include:

1. Camping (including tents, cars, or other vehicles)
2. Low-barrier and/or congregate shelter
3. Porta-potties that are not fully screened and roofed
4. Service trailers
5. Drop-in services
6. Pallet houses

The Committee recognizes that exceptions may be made, particularly in response to a community emergency (e.g., flood, fire, earthquake).

2200 Ashland St. Site Management

Details regarding policies, rules, expectations, and responsibilities, referenced below are further discussed in "Other Considerations" on page 6.

- A. The City of Ashland shall provide strong and continuous contract management for program providers, with approval of **program and site management policies** before delivering services. Policies shall include standards for client services, security, exit planning, and staff training.
- B. All clients (residents and non-residents) shall be supported with best practices in social services and coordination with other community resources to help them achieve self-sufficiency. A **client bill of rights** shall be provided to each client.
- C. The City of Ashland shall establish an ongoing 2200 Ashland St. **Advisory Committee** with representatives from the surrounding area, as well as people with lived experience of homelessness. The advisory committee shall be integral in supporting strong management of the site.
- D. Expectations shall be laid out in seeking service providers who will work with the City and surrounding area to **deliver high-quality services and mitigate any concerns that arise**.
- E. Except for the Severe Weather/Smoke Shelter, any classes or services provided on site shall be by appointment or pre-registration. People served at this location must make an appointment and abide by **clearly communicated rules**.
- F. Clients must agree to a **code of conduct and sign a behavior contract** that describes expectations and protocols for completing or terminating services.
- G. This site is not suited to serve high-needs individuals (e.g., people in active addiction or with severe or persistent mental health disorders). The population to be served by providers at this site shall be taking steps toward self-sufficiency and identified as such through a provider evaluation. The evaluation will help ensure appropriate matching of needs and services.
- H. Residential stays shall be for a duration sufficient for individuals to prepare for self-sufficient living; likely no longer than 24 months.
- I. Residents shall be engaged in activities to increase their ability to be self-sufficient in stable housing.

Other Considerations

2200 Ashland St. is just one City-owned property, with a dedicated purpose to serve people experiencing homelessness. The location of this property and existence of a major homeless services center within one mile of the site were major factors in shaping these recommendations.

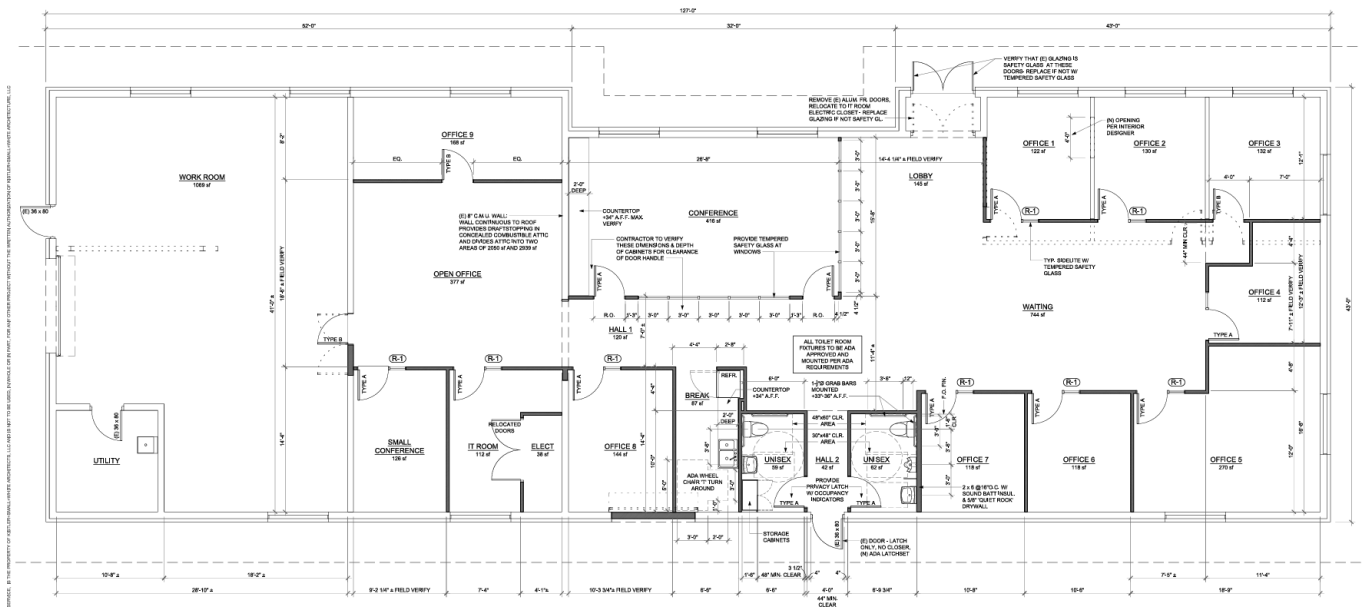
The site cannot meet all needs, or even the most critical needs of people experiencing homelessness. **Anything located at the site should be well designed and complement other services**, specifically:

- A. Services at 2200 Ashland St. shall be **coordinated with other resources** throughout the region to facilitate effective access to a network of homeless services.
- B. The City of Ashland shall use the action framework provided in the August 2024 Homeless Services Assessment Report to implement other viable and promising actions to help resolve and/or reduce homelessness, **without further concentrating homeless services in south Ashland**.
- C. The City of Ashland shall fill the **staff position** approved by Council to assist the City in advancing a coordinated and well-articulated approach to homelessness services, including supporting implementation of the recommendations within this document.
- D. The City of Ashland shall develop a **communications and engagement plan** for use with key stakeholders, including those in the surrounding area and potential clients to be served on the site.
- E. To expedite implementation, the City Council shall **extend or otherwise re-charter the Ad hoc Committee** to assist with the development of the following:
 - 1. A Site Plan Design that incorporates elements of these recommendations;
 - 2. A checklist for program and site management policies (e.g., standards for client services, security, exit planning, and staff training);
 - 3. A client “bill of rights,” code of conduct, and behavior contract;
 - 4. A set of site rules;
 - 5. The role of an ongoing 2200 Ashland St. Advisory Committee;
 - 6. Components of a communications and engagement plan for use with key stakeholders, including those in the surrounding area and potential clients to be served on site; and
 - 7. Interim uses for the site.

Attachment: 2200 Ashland St. site map and floor plan of existing building



Land: 52,272 sq. ft. (1.20 acres)



5,333 sq. ft. finished interior



Council Business Meeting

Date: December 3, 2024

Agenda Item	2200 Ashland Street Facility Plan Ad Hoc Committee
From	Sabrina Cotta
Contact	sabrina.cotta@ashland.or.us

SUMMARY

The Mayor is proposing an additional Ad Hoc Committee to assist in the development of a facility site plan, communications and engagement structure, guiding documents and the structure of a long-term advisory committee for the building and surrounding property at 2200 Ashland Street.

POLICIES, PLANS & GOALS SUPPORTED

BACKGROUND AND ADDITIONAL INFORMATION

Mission

Assist the City Council and city staff in developing a facility site plan, a communications and engagement structure, guiding documents, and the structure of a long-term advisory committee for the building and surrounding property at 2200 Ashland Street. These efforts will build on the Master Plan Recommendations for the site, align with contractual obligations, further the community's goals regarding homeless services and affordable housing, and enhance the experience of the surrounding neighborhood.

Goals

1. Develop siting and phasing plans for the optimal combination of appropriate services at this City-owned property as identified by the 2200 Ashland Street Master Plan Ad Hoc Committee.
2. Ensure that rules, management processes, a stated commitment to the dignity of those served by the facility, and engagement processes create a positive culture for the site and that interim uses are appropriate.

City of Ashland Value Statements Supported by this Ad Hoc Committee

- Regional cooperation, including in support for public safety and homelessness
- Community affordability, including in available housing and childcare
- Belonging through mutual respect and openness, inclusion and equity
- Quality of life that underpins the City's economic vibrancy
- Environmental resilience, including addressing climate change and ecosystem conservation

Committee Charge

To expedite implementation of the 2200 Ashland Street Master Plan Recommendations, the City Council creates the 2200 Ashland Street Facility Plan Ad hoc Committee to assist with the development of the following:

- a Site Plan Design that incorporates elements of the recommendations developed by the 2200 Ashland Street Master Plan Ad hoc Committee;
- a checklist for program and site management policies (e.g., standards for client services, security, exit planning, and staff training);
- a client "bill of rights," code of conduct, and behavior contract;
- a set of site rules;
- the role of an ongoing 2200 Ashland St. Advisory Committee;
- components of a communications and engagement plan for use with key

stakeholders, including those in the surrounding area and potential clients to be served on site; and





Council Business Meeting

- interim uses for the site.

Scope of Authority

The 2200 Ashland Street Facility Plan Ad Hoc Committee will propose management processes and documents to the City regarding this site, consider and provide recommendations to Council regarding interim uses at the site, assist city staff and council with public engagement regarding site planning, provide a final recommendation to Council regarding site planning, and recommend the structure and focus of an ongoing advisory committee. This committee will follow all standard public meeting and ethics regulations.

Membership

This ad hoc committee will be comprised of representatives from the following:

- Surrounding Neighborhood
 1. *Representatives from the surrounding neighborhood will bring the perspective of the site's neighbors related to both residential and commercial interests. Neighborhood representatives will have voting privileges.*
- Unhoused Community
 1. *Representatives who have experienced homelessness will provide first-hand knowledge of the lived experience of Ashland's unhoused residents and the effectiveness of a variety of possible options for the site. Unhoused community representatives will have voting privileges.*
- Service Providers
 1. *Representatives of local social service provider organizations will bring programmatic expertise to the planning process as well as a clear understanding of regional initiatives and how this property might address specific needs. Service provider representatives will have voting privileges.*
- City of Ashland
 1. *The City of Ashland will support the work of the Ad hoc Committee with a Staff Liaison as well as subject matter experts on homeless services, affordable housing, and building and fire code regulations, as appropriate. Up to two Council Liaisons will be assigned to the Ad hoc Committee. City members will be non-voting.*

The Committee will select co-chairs who will facilitate the Ad Hoc Committee process with assistance from the Staff Liaison.

Timeline

Members will be named to this Ad hoc Committee at the mid-December council business meeting following an open call for applicants. The Committee will sunset when the deliverables listed under Committee Charge above have been completed.

FISCAL IMPACTS

Estimated \$26,000 plus depending on timeline and staffing requirements (based on cost of last ad hoc process).

SUGGESTED ACTIONS, MOTIONS, AND/OR OPTIONS

I move the creation of an additional ad hoc for 2200 Ashland Street.

Staff recommendation: If council feels feedback and outside expertise is necessary for next steps, staff would propose a MAC to cut down on expenses and staff time.

REFERENCES & ATTACHMENTS

1. 2200 Ashland Street Facility Plan Ad Hoc Committee Charge - Draft 240225

2200 Ashland Street Facility Plan Ad Hoc Committee

Mission

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City Manager's Report

12.3.2024

CITY MANAGER'S OFFICE:

- **Jordan Rooklyn** is our new Deputy City Manager! We are excited for the opportunity to continue working with Jordan, who has been serving as our Economic Development Specialist on a contract basis.
- Staff is partnering with Lamar Advertising to launch a yearlong **advertising campaign on RVTD (Rogue Valley Transportation District) buses**. The campaign, which will begin in December, will feature four seasonal ads displayed on two Ultra King buses. The buses operate across all routes throughout Southern Oregon, from Ashland to Eagle Point and out to Jacksonville. The primary goal is to attract tourists to Ashland, and it will be funded by Transient Lodging Taxes (TLT).
- We've launched a new webpage titled **"Your Taxes at Work."** The page highlights the Food & Beverage Tax (F&B) and Transient Lodging Tax (TLT), providing a history of these taxes along with examples of projects that have been or will be funded. Visit it at ashlandoregon.gov/YourTaxesAtWork.
- The **December 2024 City Newsletter** is available at ashlandoregon.gov/CityNewsletters.
- Mark your calendar for the annual **Town Hall gathering on January 22** at the Rogue River Room in the Stevenson Union at Southern Oregon University. Upcoming details will be posted at ashlandoregon.gov/Townhall.

ELECTRIC:

- Our Electric Department continues to receive positive feedback for their thoughtful and professional service. One Ashland resident recently expressed appreciation for the careful tree trimming done around their sweet gum tree, highlighting the crew's attention to detail and communication throughout the process. The resident wrote:
*"Hi **Dave [Wood]**,
I wanted to thank you for the great care you and your crew did trimming my sweet gum tree away from the electric wires last week. We were afraid it was going to be butchered, and really appreciate that you took the time to talk to us about what you were doing, it looks great. Please extend my thanks to your crew, **Jon [Frey]**, **Lonnie [Maybin]** and **Ryan [Maddin]**."*

FINANCE:

- Finance plans on **moving all Finance Divisions to its new location at 2245 Ashland St in mid-December**. It will continue to keep its customer service hours at The Grove through December as it completes its move. More information about the Finance move in our January City Newsletter.
- **Applications for our Utility Assistance program are now available**. More information at ashlandoregon.gov/UtilityAssistance.
- **Bond Counsel is preparing the documentation to finalize the RESP (Rural Energy Savings Program) Loan Agreements** with the USDA.
- The **Annual Audit is underway**.
- Applications are being accepted **to serve on the Citizens' Budget Committee**.
- Finance and Public Works will **proceed with the EPA financing of the Water Treatment Plan** after the passage of Measure 15-234.





City Manager's Report

FIRE:

- In November, eight individuals came off their probationary status in the Fire Department with a celebration held at Fire Station No. 1 on November 7. Congratulations to Deputy Chief- Fire Marshal **Mark Shay**, Division Chief-Training/EMS Officer **Tom McGowan**, Single Role Paramedics **Lauren Fischer** and **Rob Marten**, Single Role EMTs **Kylar Tosh** and **Thomas Cermack** and Fire Fighter Paramedics **Jack McGuire** and **Gabriel Foltz**.
- Also in November, two new Single Role paramedics have also started with the Fire Department. Welcome **Daniel McLean** and **Jonathan Fabich**.
- **Fire District 5 has worked out an agreement with Fire District 3 for Chief Mike Hussey and his administrative team to assist District 5.**

HUMAN RESOURCES:

- **Recruitment for the City Attorney** is now [live](#).
- **Congratulations to Rod LaCoste** from Fire, who is retiring on December 20, 2024, after nearly 24 years of service. His last assignment was as an Engineer on B-Shift. His pursuit for perfection, hunting and storytelling, in addition to his love of woodworking will forever be enshrined in the history of Ashland Fire & Rescue, as evidenced by the Bell Stand that he designed and built. The stand is on display in the main lobby at Fire Station No. 1.



Rod LaCoste





City Manager's Report

- **Congratulations to Steve Burkhalter** from Electric, who is retiring after more than 36 years of service. Steve started with the City in the Street Division of the Public Works Department and quickly became one of the go-to people in the department. His unique skillset includes all the knowledge and skills necessary to maintain our city streets, and in addition to that, he has a unique gift with his ability to understand and operate technical software and equipment. That combination makes him so valuable in so many ways to the City, and on top of all that, he's a great person! He will be very missed, both for what he does for the City, and even more so just for who he is! Steve is definitely one of a kind, and we will miss him greatly!



Steve Burkhalter, second from right with our Street Division in 2006

INNOVATION & TECHNOLOGY (DoIT or Department of Innovation & Technology):

- The DoIT will be conducting a major **network switch upgrade** and will be coordinating with departments to minimize work disruptions.
- AFN (Ashland Fiber Network) has deployed a dedicated fiber line to the Goodwill building.

PARKS & RECREATION:

- **Kirsten Came** is Parks' new Environmental Education Program Manager. Her first day of work will be December 9. Kirsten has an extensive background in Environmental and Interpretive Education, which utilize the skills she developed working as a park ranger and high school teacher. Her office will be in the Nature Center and her work will include creating opportunities for Environmental Education throughout the Ashland parks system. Welcome Kirsten!
- **The Parks & Rec Draft 2026-2031 CIP** has been posted on the [City website to solicit public comment](#). Staff and Commissioners will also collect public comment on the draft plan at the December 4 APRC (Ashland Parks & Recreation Commission) regular business meeting.
- **The Trails Advisory Committee (TAC)** is accepting applications for members. The application process ends December 15. Interested people can [apply via the City website](#).
- **The Ashland Rotary Ice Rink is open for the season!** Ashlandoregon.gov/IceRink.





City Manager's Report

PUBLIC WORKS:

- In November, our **street sweepers** cleared every street in Ashland at least once, **collected 450 cubic yards of leaves**, and emptied the City B Street Yard. Crews are revisiting areas missed due to parked cars and overgrown vegetation. (This information was shared on our social media platforms – See comments below from Nextdoor.) The street sweeping schedule and map can be viewed at ashlandoregon.gov/Streets, in addition to the Snowplow Route map.



"The new street sweeper person in our neighborhood did a terrific job, very thorough and thoughtful about his work, much appreciated."

"Excellent job! It really makes a huge difference. We appreciate it on Beach Street. It's looking great!"

"I love living in a town that has street sweepers—thank you for keeping the streets clean. And thank you street sweepers for indulging my waves!"

"Good work! Thank you City of Ashland!"

– Comments from our residents on Nextdoor

WHAT'S COMING UP?

- Join expert birding volunteers for **Project FeederWatch** at North Mountain Park on alternate Saturdays this winter beginning **December 7** and continuing through March 15, 2025.
- Got Leaves?** Ashland Recology is offering a FREE leaf composting event on **December 8**. Information at recology.com/recology-ashland.
- CERT (Community Emergency Response Team) Trainings:**
 - Radio Communications on **December 11**
 - WRAP (Wildfire Risk Assessment Program) on **January 8**
- Watch for the Gala Community event, **FIRST FROST, on December 21, at the Ashland Rotary Centennial Ice Rink**. Information and schedule at ashlandoregon.gov/IceRink.
- Holiday Party for Seniors and their Families** at Ashland Senior Center on **December 20** – Information at AshlandSeniorServices.org.
- Medication Matters, What Matters to You? at Ashland Senior Center on **January 6** – Information at AshlandSeniorServices.org.
- Town Hall 2025**, on **January 22**. Information at ashlandoregon.gov/Townhall.

