

**Ashland Housing and Human
Services Commission**
Regular Meeting Agenda



September 24, 2020: 4:00 – 7:00pm
Siskiyou Room of the Community Development Building
51 Winburn Way

1. (4:00) **Approval of Minutes** (5 min)
July 23, 2020
2. (4:05) **Public Forum** (5 min)
3. (4:10) **Affordable Housing Trust Fund Review and Recommendation** (60 min)
Linda Reid, Housing Program Specialist
4. (5:10) **Affordable Housing Program Revisions Review and Recommendation** (60 min)
Brandon Goldman, Senior Planner and Linda Reid, Housing Program Specialist
5. (6:10) **Cohoots Program Update** (10 min)
Rich Rohde, Commission Chair
6. (6:20) **Utility Assistance Recommendation Updates** (10 min)
Linda Reid, Housing Program Specialist
7. (6:30) **General Announcements and Updates** (20 min)
8. (6:50) **Upcoming Events and Meetings**
Next Housing Commission Regular Meeting
September 24, 2020
9. (7:00) **Adjournment**

Written testimony from the public will be accepted via email to linda.reid@ashland.or.us for both general public forum items and agenda items. Written testimonies submitted by the public by 10:00a.m. on Wednesday September 23rd will be available to the Housing and Human Services Commission before the meeting and will be included in the meetings minutes.

In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the Community Development office at 541-488-5305 (TTY phone is 1-800-735-2900). Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to ensure accessibility to the



CITY OF ASHLAND

Ashland Housing and Human Services Commission

Draft Minutes

July 23, 2020

Call to Order

Commission Chair Rohde called the meeting to order at 4:00 pm in the Siskiyou Room at the Community Development and Engineering Offices located at 51 Winburn Way, Ashland, Oregon, 97520.

Commissioners Present:	Council Liaison
Rich Rohde	Dennis Slattery - ABS
Echo Fields	
Gina Duquenne	SOU Liaison
Tom Gunderson	None appointed at this time
Heidi Parker	
Chris Mann	Staff Present:
Jackie Bachman	Linda Reid, Housing Program Specialist
Linda Reppond	Brandon Goldman, Senior Planner
Commissioners Not In Attendance:	
Erin Crowley	

Approval of Minutes

**Commissioners Jackie Bachman / Gina Duquenne m/s to approve the minutes of May 28, 2020.
Voice Vote: All Ayes. Motion passed**

Public Forum - None

Affordable Housing Standards Land Use Ordinance Amendments

Linda Reid and Brandon Goldman presented the proposed changes for the Ordinance.

Commission discussion:

Heidi concerned that the new rental at 60% AMI is too high

Rich likes the Development Timing proposed amendment as he feels it promotes developers to partner with low income or non-profit projects.

Echo does not like the Housing Distribution proposed amendment, feels it adds to the stigma.

Jackie feels the opposite

Gina feels she does not see that in Snowberry

Heidi in regard to Term of Affordability, she is concerned about repairs needs after 30 years and how low income would handle that.

Rich feels the longer time frame is a selling point for Affordability. Wants more feed back from loaning institutions about the longer time frame

Heidi asks Brandon about an attachment on a bill of sale that city has the right of first refusal.

Analysis of Impediments to Fair Housing Choice-Public Hearing

Review by Linda Reid.

Commissioners Heidi Parker / Echo Fields m/s to approve the 2020-2024 Analysis of Impediment to Fair Housing Choice presented by Linda Reid. Voice Vote: All Ayes. Motion passed

COVID-19 Updates

Speaker Dr Jim Shames (Jackson County Public Health Officer) answers questions about COVID come winter shelter time and about testing for COVID in the homeless and elderly communities.

Commission discusses any money procured for COVID and housing issues.

Upcoming Events and Meetings

**Work Group for Hardesty property: Gina Duquette, Linda Reppond
Next Housing Commission Regular Meeting TBD**

Adjournment: Rich Rohde adjourned the meeting at 5:50p.m.

Respectfully submitted by Liz Hamilton

Staff Evaluation AHTF

To: Ashland Housing and Human Services Commission
Title: Affordable Housing Trust Fund (AHTF) Award Revisited
Date: September 24, 2020
Submitted by: Linda Reid, Housing Program Specialist

At a virtual meeting held on March 26th, the Housing and Human Services Commission reviewed Affordable Housing Trust Fund applications and made a funding recommendation to forward to the Council. At that time whether and when Affordable Housing Trust funds would be awarded was thrown into question by the onset of the Coronavirus Pandemic. Since that time, the City has received additional funding to address the needs created by the pandemic and has been working with area non-profit and service providers to address those needs as they arise with the funding available. Consequently, the City was able to maintain the Affordable Housing Trust fund, utilizing only a small portion to address urgent needs.

Resource	Total Amount Available	H&HSC Recommendation	Funds Committed	Remaining Balance
Affordable Housing Trust Fund	\$216,986	\$110,000-OHRA \$43,500-NWU	\$3,500-OHRA \$1,500-JxCo	\$211,986

The City of Ashland originally received three applications for \$216,986 in competitively available Affordable Housing Trust Funds (AHTF). The City of Ashland Housing and Human Services Commission held a public hearing on March 26, 2020 to review the grant requests and made a recommendation to forward to the City Council for consideration.

Commissioners Echo Fields / Jackie Bachman m/s to recommend funding immediately OHRA, the above proposed [\$110,000] amount with flexibility to direct those funds to match the emerging needs during this pandemic. Commission also recommends funding Neighbor-works Umpqua the above proposed amount [\$43,500].

This item has come back before the Commission to consider a revision to an earlier request and an additional request for funding. The original request from OHRA was with the expectation that the winter shelter program would continue in its current location. However, due to the need to practice social distancing to prevent the spread of the Coronavirus in congregate shelter settings OHRA has had to develop an alternative winter shelter plan to ensure the safety of the shelter guests and the shelter staff. Due to this change OHRA is resubmitting a funding request. This is a new request, not a request in addition to the original request. Similarly, Maslow Project is requesting funding to address the needs of the homeless youth population they serve while continuing to practice social distancing and ensure the health and safety of those populations and their employees.



Some or all of the non-congregate sheltering activities proposed by both OHRA and Maslow Project may be eligible to receive reimbursement through the Federal Emergency Management Agency (FEMA), but only if they are paid with City funds. Affordable Housing Trust funds would qualify for FEMA reimbursement, but CDBG funding would not because they are already a federal funding source and therefore would not be reimbursable by another federal funding source, in this instance, FEMA. Once the commission reviews the new information, staff would like the Commission to make a funding recommendation. Any recommendation, revised or not, will be forwarded to the Council. The City Council is scheduled to review applications and hear recommendations on October 6, 2020.

Because new information is being provided, staff has notified both new and previous applicants of the Commission’s intention to revisit and potentially revise the original recommendation. All applications have been invited to speak to the commission in support of their proposals and to make the Commissioners aware of any changes to the original proposals.

Original Proposals Received

Organization	Proposed Project	AHTF Funds Requested	Resolution 2008-34 Preferences	Consolidated Plan Goal and Rank*	Council Goals
Darrell Cottage Housing Proposal	Develop 1 unit of Affordable Housing targeted to ownership households earning 120% AMI or below. And one unit of market rate housing.	\$50,000	4.1a -New affordable housing units 4.1f -Green Building	High -Provision of Affordable Housing	5. Seek opportunities to enable all citizens to meet basic needs 5.2 Support and promote, through policy, programs that make the city affordable to live in. 5.3 Leverage partnerships with non-profit and private entities to build social equity programming.



Neighborworks Umpqua	Short Term: A proposal to build capacity and enhance, strengthen and expand existing housing programs. Long Term: Predevelopment costs for potential housing development.	\$43,500	4.1c -Utilizing a land trust model 4.1h -Long-term affordability 4.1i -Sponsored by a non-profit	High -Provision of Affordable Housing	5. Seek opportunities to enable all citizens to meet basic needs 5.3 Leverage partnerships with non-profit and private entities to build social equity programming
Options for Homeless Residents of Ashland	Funding to continue operating the winter shelter program and provide case management to remove barriers and assist in obtaining permanent housing	\$110,000	4.1i -Sponsored by a non-profit	High -Addressing issues of homelessness High -Services to Special Needs Populations	5. Seek opportunities to enable all citizens to meet basic needs 5.2.a Pursue affordable housing opportunities, especially workforce housing. Identify specific incentives for developers to build more affordable housing. 5.3 Leverage partnerships with non-profit and private entities to build social equity programming 5.4 Encourage the ongoing effectiveness of the resource center.

Revised/Additional Funding Requests

Organization	Proposed Project	AHTF Funds Requested
OHRA	Winter Shelter	\$190,223
Maslow Project	Emergency Housing	\$30,000

Attachments

Darrell Cottage Housing Proposal
Maslow Project Proposal
Neighbor Works Umpqua Proposal
OHRA Revised proposal



Sean Darrell
945 Tolman Creek Rd.
Ashland, Oregon

Linda Reid
Housing Program Specialist
City of Ashland
51 Winburn Way Street
Ashland, Oregon 97520

Subject: Sean Darrell - Ashland Housing Trust Fund Proposal

February 28th, 2020

Dear Linda:

Attached please find my proposal to the City of Ashland in request for funds from the City of Ashland's Affordable Housing Trust Fund. The funds will be used for the Construction and Conservation of new affordable housing. I am very excited to be able to submit my proposal, as the AHTF is a fund that has direct benefits of those in our community seeking affordable housing up to 120% of AMI. I look forward to presenting my proposal on March 26th, 2020 to the Housing and Human Services Commission.

Sincerely,



Sean Darrell
Tolman Creek Cottage Project Owner
541-274-0939

Sean Darrell - AHTF Proposal

1. Introduction

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

Hi, my name is Sean Darrell, and my family and I are proud homeowners in the Ashland community. I am grateful to be able to live and work in the community I love. But my story about getting to this point is like many stories you have heard before. That a large percentage of our workforce community struggles to own an affordable home in Ashland.

My Ashland Story:

In 2009, I began working for Coming Attractions Theatres in Aberdeen, Washington. In 2010 I had the opportunity to progress my career and move my wife and I to Ashland to further my career. Coming Attractions Theatres is headquartered in Ashland and operates the local movie theatres. We were warned when we moved, by several rental and real estate companies that living in Ashland was not as 'affordable' as living in the surrounding areas. We did not heed the warning but were determined to live in the city we worked in and had grown to cherish.

My wife and I suffer from MCS (multiple chemical sensitivities) which is a condition that makes renting more difficult for us. The environment we live in has to meet a certain criterion for us to stay healthy. As renters this was extremely difficult, and we found ourselves cost burden while living in Ashland many times to meet our basics needs. To name a few examples; no carpet, no pets, no smoking, no scented air fresheners. Renting over the years had been a leading contributor to our failing health. We were in rentals that had hidden toxins, black mold, unhealthy 'cheap' construction, and other conditions that affected our health.

By 2012 our health could no longer afford us to be living in rentals any longer. We also wanted to plant our roots in the City and Community of Ashland. We excitedly received preapproval to buy our first home. We were warned again by many friends that the affordability in Ashland was extremely competitive. And we soon found out that it was not only competitive but seemed nearly impossible to find a home in our approved price range. As homes became available, they were being bought at a high demand. Because we suffer from MCS buying an existing built home was not easy for us. But the pressure and demand on the market found us making offers on homes that did not meet our needs. By 2013 we gave up hope with home ownership in Ashland, as we continually were out bid. We began looking in the surrounding areas, and by summertime of 2013 decided to give up. We were devastated.

In 2017 we were able to acquire an off-market land parcel from a very good friend who also helped us in the financing of the construction of a small affordable home we dreamed about having. To our dismay we could not locate a builder willing to take on the project and pay close attention to our Non-Toxic requirements. After local interviews with local contractors, Asher Homes was the only one at the time to take on the project. So, from concept to final construction our family had the space we finally needed.

We know the struggles we went through to get an affordable home, and we are excited for the opportunity to allow others that are currently experiencing the same things to have an affordable and healthy home in Ashland.

Our Project Goals:

- Provide quality affordable workforce housing to the residence and future residence of Ashland.
- Introduce a “NON-TOXIC” affordable home to the affordable housing market. In which “Building Healthy” does not have to be sacrificed in the building of affordable housing. The same luxuries that are seen in the top dollar houses can be easily applied to affordable housing.
- Help educate the community that “Building Green” is not the same as “Building Healthy”.
- Help educate First Time Home Buyers wanting to remain in Ashland about the hurdles and programs I have been involved in, so they can be successful with their homeownership goals.
- After project completion continue to pursue opportunities and build developments that will benefit the community through affordability and health.

Objective: As we are considered in this proposal a for profit entity, our objective of the AHTF is for the funding support for construction of a One-Bedroom 360 Square-Foot single family residence. This home will be sold under the affordable housing guidelines of those in our community that want to live in Ashland, and do not exceed the 120% of Area Median income.

The final sell price of Unit#1 will be based on current market value, appraised value, and final expenses. The unit will be priced as to have as many 1 & 2 person households up to 120% AMI be able to qualify for it. Profits made from the sale of the home will then be used to build an additional One-bedroom 400 Square-Foot home in the rear of the property.

2. Project Description

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

Funding is being requested for the construction and conservation of a 360 square-foot one-bedroom cottage (Unit#1), which is part of a 3 Unit Cottage project. The full PA-T2-2019-00012 Proposal with Staff Notes are included with the proposal.

PLANNING ACTION: APPROVED PA-T2-2019-00012

SUBJECT PROPERTY: 945 Tolman Creek Road

DETAILS: The Tolman Creek Cottage Project is a three unit, four-lot, cottage housing development. Unit # 1 and Unit # 2 would be within the existing, 1,127-square foot single story, structure that was recently constructed in 2017 / 2018 (BD-2017-00754). The front portion of this structure is currently a guest house, and will become a 360 square foot, one-bedroom residence unit (Unit #1). The rear unit is a 767 square foot, two-bedroom residence (Unit#2). At the rear of the property, a 400-square foot unit (Unit #3) with an attached 200 square foot carport will be constructed.

There are two large areas of common open space provided and large private open spaces. There are two, large stature conifer trees on the property. A 41-inch diameter at breast height (DBH) Sequoia tree and a 20-inch (DBH) Ponderosa Pine tree. Both are preserved and will have tree protection in the final CC&Rs. The property is to be designated as a Chemical Free/ Pesticide Free Zone and the landscape is intended to have raised garden beds.

All units are energy star and earth advantage rated and are built with the top-quality products and energy saving solutions. The existing and proposed development has been built **beyond green standards** and designed for those individuals that live with Multiple Chemical Sensitivities (MCS). Every component in the building process was reviewed and then alternatives were selected when possible to create an extremely safe and healthy environment.

Milgard Vinyl Windows	ZERO VOC paints
Bryant Mini Split Heat/Air	ZERO VOC Flooring
Formaldehyde-Free plywood	LEAD & ASBESTOS FREE Tile
No Lead -NSF/ANSI 61	NON-TOXIC sealants & grouts

Castle Combe Wood Flooring:

- *Safe, non-toxic* — no added formaldehyde; zero VOC oil finish is healthy for you and your family; CARB2 compliant and Green Guard Gold third party certified
- *Sustainably-harvested* — 100% FSC Certified; sourced from certified forests whose owners demonstrate social, economic and environmental responsibility and stewardship

Eco Paints & Stains:

- Zero VOC - No Odor - Non-Toxic: The task of Eco Paint & Stains was to create a product that didn't contain the chemicals that give people headaches, nausea, and worse. They wanted to make a clean product that people with chemical sensitivities could use, and one that anyone who wants to protect their families and friends from harm could feel good about.

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

The target population expected to benefit from the project, are those families or individuals “needing” affordable workforce housing up to 120% of Area Median Income.

For consideration: A (2) Person family working “fulltime” at the current minimum wage of \$11.25 would exceed 80% AMI if each family member averaged 36 hours per week. If that family is awarded for there hard work and averages the “City of Ashland Living Wage” of \$15.39, they would exceed 100% AMI.

Based on the 2012 Housing Needs Analysis (HNA) the highest demand is for owner occupied units affordable to households making the 100% AMI to 120% AMI. This is approximately 1,332 households. The Housing Model in the 2012 HNA also shows:

- The City of Ashland will need approx. a total of **4,607** Owner Occupied Units by year 2040. Most of those ownership units needing to be targeted to those making up to the area median income of 120% AMI.
- Owner Occupied Units are in a higher demand than rental units. According to the same analysis the City of Ashland will need approx. a total of **2572** Rental Units by year 2040. Most of the rental units will need to be targeted to those households earning 50% AMI and below.

Definitions:

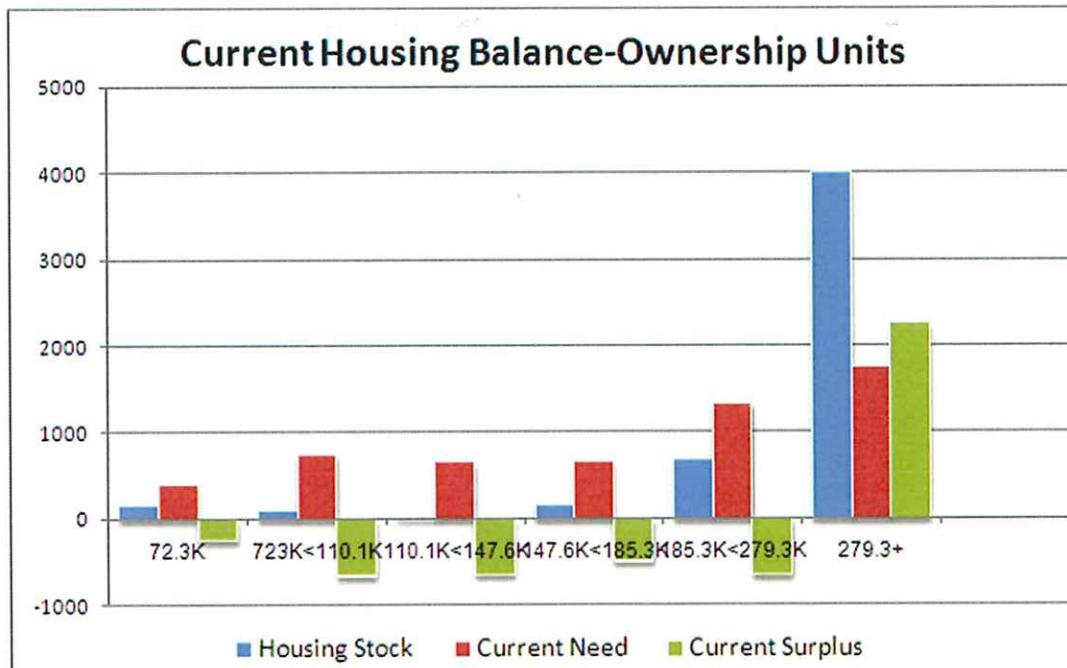
- **Workforce Housing:** the term “workforce housing” generally refers to housing for that segment of the population that earns too much to qualify for government assisted ownership and rental programs, but too little to purchase units without assistance or afford to rent without experiencing cost burden. This population often falls into the 80% to 120% of Area Median Income (AMI) category.

- **Affordable Housing:** This term refers to a household’s ability to find housing within their financial means. HUD defines housing affordability is housing costs that are 30% or less of a household’s income.
- **“Needed housing”:** As used in ORS 197.303, “needed housing” means all housing types determined to meet the need shown for housing within an urban growth boundary at price ranges and rent levels that are affordable to households within the county with a variety of incomes.

Housing Needs Analysis: (Source Adopted 2012 Housing Needs Analysis)

- **Housing Need versus Housing Demand:** Establishing the basis to evaluate Housing Need reflects the broad mandate of the Statewide Planning Goals and Guidelines, Goal 10 Housing that requires communities plan for housing that meets the needs of households at all income levels. Thus, Goal 10 implies that everyone has a housing need.
- **Housing Market Demand** is what households demonstrate they are willing to purchase or rent in the marketplace. Growth in population leads to a demand for housing units that is usually met primarily by the construction of new housing units by the private sector based on developer’s best judgments about the types of housing that will be absorbed by the market. It is the role of cities under Goal 10 to adopt and implement policies that will encourage the provision of housing units that meet the needs of all residents.
- **Median Income: (100% and 120% of Area Median Income):** Over 78% of the City’s ownership housing stock consists of units which cost \$279,300 and above, while the demand for housing units in that price range is only about 1,750 households. From Chart 3.4 below it is clear that the private market has provided a surplus of high cost housing, over 2,255 units, while the remaining 22% of the housing stock available for sale costing less than \$279,300 is in such demand that there is a housing gap of 3,147 units. The highest demand is for those units affordable to households making the 100% AMI to 120% AMI at approximately 1,332 households.

Chart 3.4



Housing Needs Model: *Owner Occupied*

- The Housing Needs Model estimates that the City will need; 402 housing units available under \$72.3k, 950 units with sale prices between \$72.3k-\$110.1k, 916 units with sale prices between \$110.1k-\$147.6k, 745 units with sale prices between \$147.6k-185.3k, and 1,594 units with sale prices between \$185.3k-\$279.3k. The majority of the ownership units will be targeted to those making the area median income to 120% of the AMI. The model assumes a surplus of units priced at \$279.3k and above.

Housing Needs Model: *Rental Occupied*

- The Housing Needs Model estimates that the City needs 1,163 units targeting those with the lowest incomes, with rents below \$195 a month, 1,166 units with rents between \$195-\$422, and 243 units with rents between \$423-\$655. It is expected that the City will have a surplus of all units with rents at \$656 and above. The Housing Needs Model shows that the majority of the rental units will need to be targeted to those households earning 50% AMI and below.

Current Market:

Currently the number of Listing on the Market as of February 21, 2020 that are only a single-family residence (1 or 2 Bedroom) are:

- # of Units Sold: 8 Median price \$317,250
- # of Units Pending: 1 Median Price \$314,000
- # of Units Active: 2 Median Price \$330,000

Currently the number of Listing on the Market as of 02/21/20 that include condos, townhomes, and single-family residence (1 or 2 Bedroom) are:

- # of Units Sold: 24 Median price \$310,000
- # of Units Pending: 4 Median Price \$301,450
- # of Units Active: 13 Median Price \$330,000

Current Housing Market Conditions: (source Southern Oregon MLS; data attached to proposal)

From November 1st, 2019 to Jan 31st, 2020 Jackson County *existing home sales* had a median sales price of \$299,925, with Ashland’s median sales price averaging \$434,438. The median *new home sales* for the same period show Jackson County at \$342,300 and Ashland at \$450,000.

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

The overall project will benefit 3 Households, 2 units indirectly with 1 unit (33.3% of the project) being the proposed unit in which funding would be used.

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

Three owner-occupied single-family residences will be created under this project. (2) one-bedroom residence under 400 square foot, and (1) two-bedroom residence under 800 square foot.

- **Provide a detailed timeline leading to the completion of the proposed program/activity.**
 - July 2020
 - Submittal to the City for approval of final plans and plat
 - August 2020
 - Obtain required permits
 - Installation of remaining infrastructure
 - Plumbing Installation
 - Electrical Installation
 - Tree protection in place
 - September 2020
 - Finish remaining Infrastructure Install
 - Begin landscaping/fencing
 - Install mini split/HVAC
 - Final finishing
 - Electrical
 - Shelving and Closet Doors
 - Touch up Paint/Stain
 - Blinds
 - Appliances (Range, Hood, Fridge, Washer/Dryer)
 - October 2020
 - Obtain Certificate of Occupancy
 - List on MLS for Sale

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

Map is included as an attachment in the proposal

3. **Project Experience**

- **Describe the respondent's organizational framework, special resources, and any other information to demonstrate that the respondent can effectively and efficiently complete the proposed program/activity.**
- **Describe the respondent's organizational experience in completing programs or activities similar to the proposal outlined in the RFP.**

Professional:

I am the Vice President, Director of Marketing and Concessions for Coming Attractions Theatres Inc. Coming Attractions is headquartered here in Ashland Oregon and has been locally owned and operated since 1985. My roles with Coming Attractions give me the responsibilities for the overall success of the food and beverage department, marketing programs, and implementation of programs for 22 locations across California, Oregon, Washington, and Alaska. I have been employed with Coming Attractions Theatres for over 9 years. In my tenure I have worked on many remodels and new construction projects.

Some recent construction projects include:

2019: New Construction – Commercial

Location: Kenai AK

Construction Duties: Kitchen Design & Implementation; Project Planning; IT Planning & Implementation.

2019: Remodel/Addition – Commercial

Location: Kenai AK

Construction Duties: Snack Bar Design & Implementation; Project Planning.

2016: New Construction – Commercial

Location: Wasilla AK

Construction Duties: Kitchen Design & Implementation; Project Planning; IT Planning & Implementation.

2016: Remodel– Commercial

Location: Aberdeen WA

Construction Duties: Kitchen Design & Implementation; Project Planning; IT Planning & Implementation.

Personal:

2018 – 2020: PA-T2-2019-00012 -Tolman Creek Cottages: The Tolman Creek Cottage land use approval was approved on February 11th, 2020. This approval took dedicated time to research as the cottage ordinance was very new to most planners, contractors, surveyors, and real estate brokers. I managed the project through the entire process from Pre-Application Conference to Final approval. Tackling any hurdles that presented themselves along the way.

2017-2018: BD-2017-00744 – Single Family Residential – Project Manager during the building process of the single-family resident at 945 Tolman Creek Rd. I worked very closely with the Steve Asher with Asher Homes from Initial Design to Certificate of Occupancy. I ensured that the build was not only to “Green” Standards but to “Non-Toxic” standards. Careful selection of materials used during every aspect of the building process was reviewed and approved.

- **Other organizations involved with this project and their level of involvement.**

Asher Homes is the selected contractor for the project. Steve Asher was the only contractor, out of many contractors in the private sector, that was willing to take on the construction of a small footprint home with focus on our family needs. Steve donated numerous hours and resources to help keep our costs low. This allowed us to build a Non-Toxic environment, that we will now be able to afford to share with others in our community.

About Asher Homes:

Asher Homes has over 35 Years in the business and have built a reputation as one of Southern Oregon’s premier custom home builders by focusing on the integrity, artistry, and quality craftsmanship.

Asher Homes is also recognized as the leader in Sustainable Building practices and “green” homes. Having built numerous “third party certified” green homes throughout the Rogue Valley, Steve Asher’s commitment and passion for sustainability is unrivaled. He is an Earth Advantage / Energy Star builder, an Energy Star Trade Ally, a Certified Green Professional with the National Association of Home Builders, a LEED AP, a Certified Sustainable Building Advisor, a member of both the Cascadia Region Green Building Council and the Jackson County Home Builders Association Green Building Council, a Dept. Of Energy

High Performance Home builder and the CEO of Eco – Solutions, a sustainable building consulting company. They build their homes at the Earth Advantage Platinum Standard.

Being one of the most experienced and knowledgeable sustainable green builders in Southern Oregon, Asher Homes offers third-party certification through several different verification programs. They offer LEED for Homes, Earth Advantage / Energy Star, NAHB National Green Building program and the DOE High Performance Homes program.

A sustainable green built home by Asher Homes will be more energy-efficient than a home built to current construction codes, easier on the planet and will provide a very healthy indoor environment while providing maximum durability and low maintenance.

4. Funding Request

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

The Funding request is for the completion of Unit#1 in the Tolman Creek Cottage project for the sum of \$50,000. Unit #1 is proposed to be kept as affordable for a period of 10 years. The 10 Year period was chosen as it aligns with the terms within the Oregon Bond Residential Loan program. This loan program is one of the few programs that assist buyers in a targeted rural boundary area like Ashland. Details of the Oregon Bond program are also included with this proposal.

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

No CDBG funds have been requested, as applications from the private sector would not be eligible. Applicants for CDBG fund must be a unit of government or a non-profit 501(C) (3) charitable organization. Also 51% of the targeted range for this fund is to be used on those that qualify between 30% AMI to 80% AMI.

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

The project budget is attached. The Ashland Affordable Housing Trust Fund is currently the only fund program that assists for-profit entities in creating affordable housing for our workforce up to 120% AMI.

Other City, State, and Federal programs have requirements that limit the awarding of funds to organizations that are not a unit of government or a non-profit 501(C) (3) charitable organization. These funds are also reserved for those qualifying that do not exceed 80% AMI.

- **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.**

The proposed matching funds is in the amount of \$177,900.81. This includes the land value, current construction costs, and predevelopment services. A detailed breakdown is included with the proposal.

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

A detailed breakdown is included with the proposal.

February 24, 2020

We are both long-time Ashland and Southern Oregon Real Estate Professionals. We also produce and co-host a weekly Real Estate YouTube and Radio KCMX 880 program, centering on housing issues facing buyers and sellers. Our interest and concern over the lack of workforce, affordable and lifestyle housing is something we devote hours of discussion on our program. We believe this to be the most serious housing issue facing Ashland and other communities – the need for alternative lifestyle housing.

When we visited Sean Darrell's proposed PUD at 945 Tolman Creek Rd in Ashland and saw his plans for development of a single-family lot into three units, we were extremely impressed and support his efforts to develop new lifestyle housing. We look forward to presenting them for sale to the public when they're completed and ready for occupancy.

Most new construction in our Valley continues to be standard 3 bedroom 2 – 2 1/2 bath homes averaging 1500 to 2000 sq feet of space on a .15 acre lot. Those dimensions leave out a large and growing portion of the population who wants to own and home but not a large one they cannot afford. Lifestyle housing takes up a much smaller footprint and the demand seems to be there. If the two are matched together, a significant portion of our housing shortages in new construction can be solved.

Current Ashland MLS statistics show 10 new lifestyle units for sale with average prices of \$365-\$375,000. Even though not completed, two additional units are pending. The listing agent says showings indicate a high demand for these units. They are all expected to sell once completed.

Sean Darren's project on Tolman Creek Rd, follows this same pattern of development in Ashland. Whether it's called workforce, affordable or lifestyle housing, these smaller, compact units on small private lots are the future of housing in Ashland and our Valley. We, as agents, look forward to more inventory in smaller units to meet this demand for alternative lifestyle housing.



Pete Belcastro
Principal Broker
John L Scott, Ashland



Alice Lema
JLS Top 1% Broker
John L Scott, Medford

Office (541) 488-1311 • Email ashlandoffice.johnlscott.com

 Some offices are independently owned and operated. 

Find your HOME on
www.JohnLScott.com

Current Unit#1 Constructed Costs

Plans/Arch/Surveying	\$ 847.60	Cabinets	\$ 1,643.52
Plan Check Fee & Permits	\$ 4,087.40	Countertops- Kitchen	\$ 1,593.42
Temp Utilities	\$ 681.81	Countertops - Bath	\$ -
Excavation	\$ 932.61	Bath Surrounds/Decks	\$ 3,418.07
Footing & Foundation	\$ 3,206.69	Flooring - Carpet	\$ 44.84
Utility Trenching	\$ 818.59	Flooring - Hardwood	\$ 2,180.04
Damproofing/Drains	\$ 282.57	Flooring - Tile	\$ 1,528.39
Framing Material	\$ 5,539.73	Plumbing Fixtures	\$ 3,454.14
Framing Labor	\$ 5,203.99	Electrical Fixtures	\$ 940.95
Exterior Wood Siding	\$ 1,629.84	Interior Doors/Trim/Railings	\$ 1,748.84
Siding Labor	\$ 1,112.03	Front Door/Sidelights	\$ 351.67
Roofing	\$ 1,335.15	Finish Labor	\$ 1,591.33
Windows/Sliders/Skylights	\$ 2,729.69	Finish Hardware	\$ 208.07
Plumbing	\$ 3,798.93	Appliances	\$ 834.50
Electrical	\$ 3,720.81	Decks/ Railings	\$ 1,243.37
Backfill/Labor & Materials	\$ 573.67	MISC Labor	\$ 7,910.23
Final Grading	\$ 272.24	Clean Up	\$ 514.35
Heating, Air Cond, Venting	\$ 3,487.82	Final Cleanup	\$ -
Insulation	\$ 1,024.56	HWT Platform	\$ 77.27
Drywall	\$ 2,562.28	Chain Down Spouts	\$ -
Gutters & Down Spouts	\$ 243.42	Misc. Infrastructure	\$ 2,301.40
Painting/Staining	\$ 2,887.76	Current Construction Costs	\$ 78,563.57

Budget to Complete

Surveying	\$ 5,000.00	Interior Doors/Trim/Railings	\$ 2,500.00
Legal Services	\$ 5,000.00	Appliances	\$ 3,500.00
Plans/Arch	\$ 5,000.00	Landscaping/Fencing/Irrigation	\$ 12,000.00
Utility Trenching	\$ 3,000.00	Finish Labor	\$ 5,000.00
Plumbing	\$ 4,000.00	HVAC/Mini Split	\$ 6,000.00
Electrical	\$ 5,000.00	Blinds	\$ 1,600.00
Tree Protection Fencing	\$ 480.00	Painting/Staining	\$ 2,000.00
Plan Check Fee & Permits	\$ 4,000.00	Estimated Cost to Complete	\$ 64,080.00

Matching Funds

Predevelopment Services	\$ 24,337.24
Estimated Land Value	\$ 75,000.00
Current Constructed Costs	\$ 78,563.57
Matching Funds	\$ 177,900.81

Project Budget Funding

Matching Funds	\$ 177,900.81
AHTF Funding	\$ 50,000.00
Personal Funding	\$ 14,080.00
Project Total	\$ 241,980.81

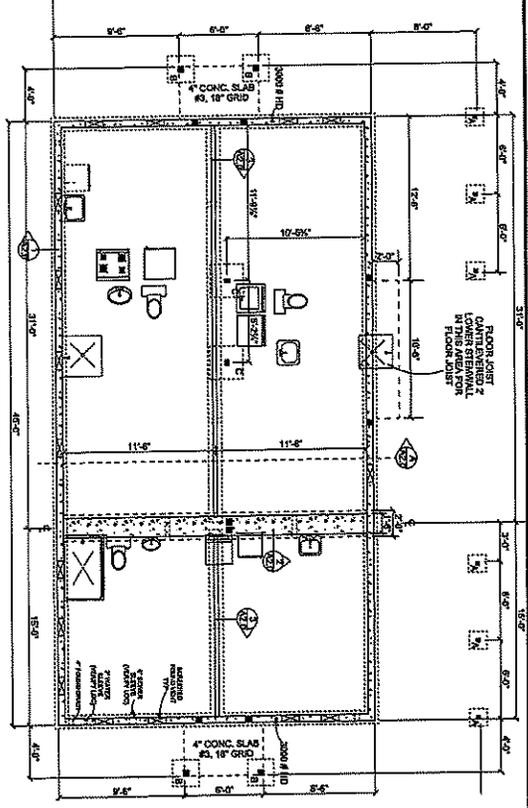
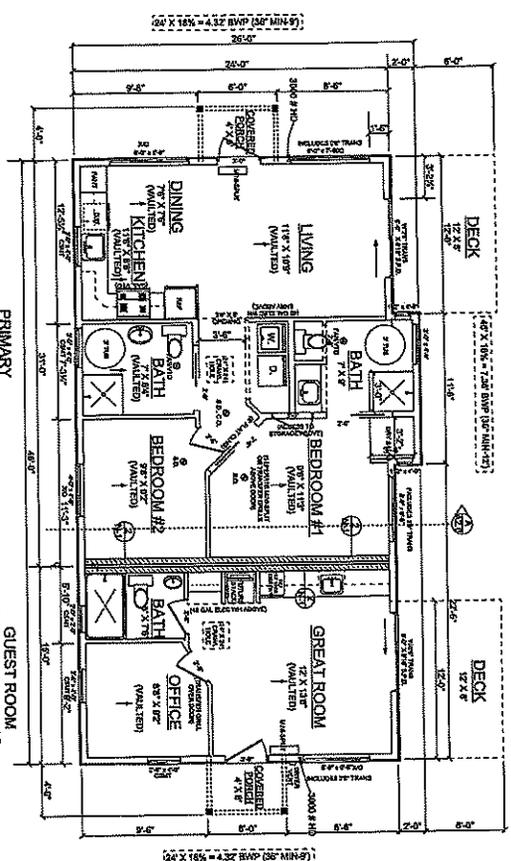
Project Owner Construction Expenses

Project Total	\$ 241,980.81
(-) Less AHTF Funds	\$ (50,000.00)
(-) Less Land Value	\$ (75,000.00)
Total Estimated Expenses	\$ 116,980.81

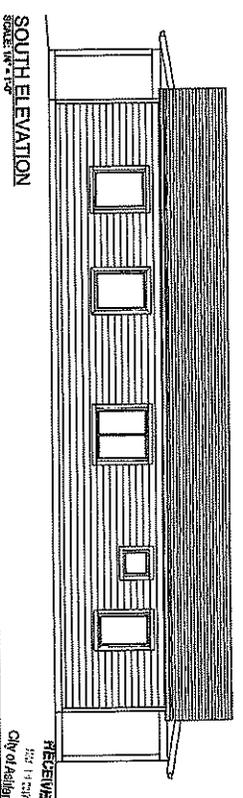
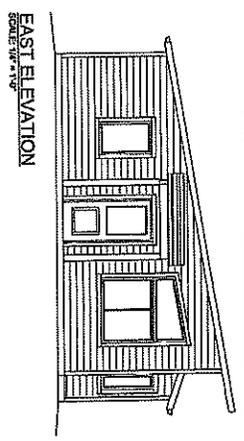
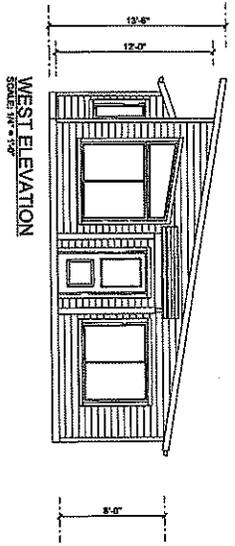
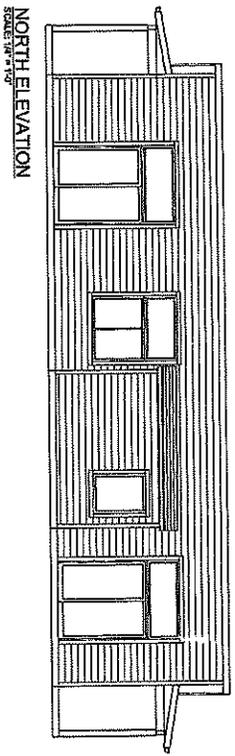
Estimated Expenses at Closing

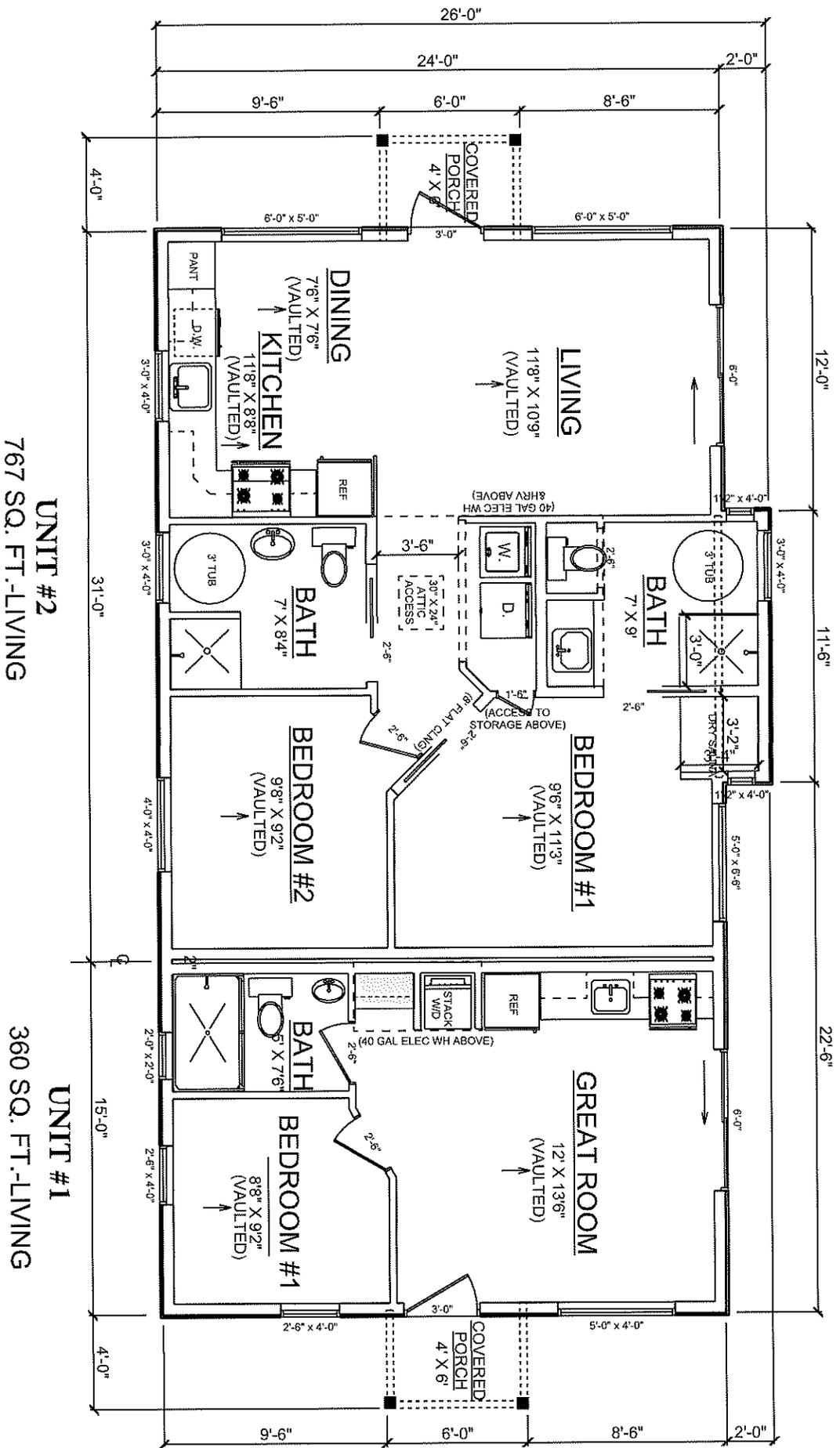
Appraisal Fees	\$ 1,600.00
Closing Cost Fees	\$ 2,000.00
Agent Listing Fees 3.0%/2.5%	\$ 13,308.94
Estimated additional Fees	\$ 16,908.94

*The final sell price of Unit#1 will be based on current market value, appraised value, and final expenses. Our objective is to be able to have as many 1 & 2 person households up to 120% AMI be able to qualify for the unit. And to afford our family the ability to construct Unit#3.



SYMBOL	SIZE	CONCRETE FOOTING TABLE	BAR	POST
A	16" X 16" X 6"	2 EA. W. EW.	2 EA. W. EW.	4 X 4
B	20" X 20" X 6"	2 EA. M. EW.	2 EA. M. EW.	4 X 4, 4 X 6, OR 6 X 6
C	30" X 30" X 12"	3 EA. M. EW.	3 EA. M. EW.	4 X 6, OR 6 X 6
D	36" X 36" X 12"	4 EA. M. EW.	4 EA. M. EW.	4 X 6, OR 6 X 6
E	42" X 42" X 12"	5 EA. M. EW.	5 EA. M. EW.	6 X 6, OR 6 X 6





UNIT #2
767 SQ. FT.-LIVING

UNIT #1
360 SQ. FT.-LIVING

APPROVALS
 EXAMINED AND APPROVED THIS 26th DAY OF MARCH, 2019
 ASHLAND PLANNING DEPARTMENT DATE 3.26.2019
 PLANNING FILE NO. A-2018-0028 (Map 19 1E 1CA, Lot 806 & 700)
 EXAMINED AND APPROVED THIS 14th DAY OF MARCH, 2019
 Sean Darrell
 CITY SURVEYOR

DECLARATION:

KNOW ALL PERSONS BY THESE PRESENTS, THAT SEAN DARRELL, SCOTT HANSEN AND JACOB HANSEN, THE SURVEYORS, HAVE BEEN THE OWNERS OF THE LANDS HEREBY DESCRIBED AND HAVE ADJUSTED THE PROPERTY LINES AS SHOWN HERON, AND THAT THE SIZE OF THE PARCELS AND THE LENGTHS OF ALL LINES ARE PLAINLY SET FORTH AND THAT THIS ADJUSTMENT IS A CORRECT ADJUSTMENT OF THE PROPERTY LINES AND THAT HEREBY CREATE A 1.60 FOOT WIDE PRIVATE UTILITY EASEMENT OVER AND ACROSS PARCEL 1 FOR THE BENEFIT OF PARCEL 2 AS SHOWN HERON.

Sean Darrell
 Scott Hansen
 Jacob Hansen
 CITY SURVEYORS

ACKNOWLEDGEMENT
 STATE OF OREGON } SS
 JACKSON COUNTY }
 PERSONALLY APPEARED THE ABOVE NAMED SEAN DARRELL, ON THIS 27th DAY OF MARCH, 2019, AND ACKNOWLEDGED THE FOREGOING TO BE HIS VOLUNTARY ACT AND DEED.

NOTARY SIGNATURE *James A. Miller*
 NOTARY PUBLIC - OREGON
 COMMISSION NO. 942342
 MY COMMISSION EXPIRES: July 26, 2019

ACKNOWLEDGEMENT
 STATE OF OREGON } SS
 JACKSON COUNTY }
 PERSONALLY APPEARED THE ABOVE NAMED GRAY HANSEN, ON THIS 27th DAY OF MARCH, 2019, AND ACKNOWLEDGED THE FOREGOING TO BE HER VOLUNTARY ACT AND DEED.

NOTARY SIGNATURE *James A. Miller*
 NOTARY PUBLIC - OREGON
 COMMISSION NO. 942342
 MY COMMISSION EXPIRES: July 26, 2019

ACKNOWLEDGEMENT
 STATE OF OREGON } SS
 JACKSON COUNTY }
 PERSONALLY APPEARED THE ABOVE NAMED SCOTT HANSEN, ON THIS 27th DAY OF MARCH, 2019, AND ACKNOWLEDGED THE FOREGOING TO BE HIS VOLUNTARY ACT AND DEED.

NOTARY SIGNATURE *James A. Miller*
 NOTARY PUBLIC - OREGON
 COMMISSION NO. 942342
 MY COMMISSION EXPIRES: July 26, 2019

Assessor's Map No. 39 1E 14 CA, Tax Lots 700 & 800

PROPERTY LINE ADJUSTMENT
PARTITION PLAT NO. P-11-2019
 LYING SITUATE WITHIN
 SOUTHWEST QUARTER OF SECTION 14
 TOWNSHIP 39 SOUTH RANGE 1 EAST, WILLAMETTE MERIDIAN
 CITY OF ASHLAND, JACKSON COUNTY, OREGON
 FOR
 Sean Darrell
 945 Tolman Creek Road
 Ashland, Oregon

SURVEYOR'S CERTIFICATE
 I, SEAN DARRELL, DO HEREBY CERTIFY THAT I HAVE CORRECTLY SURVEYED AND PLACED AND HEREIN SHOW, THIS SAID PLAT BEING A CORRECT REPRESENTATION OF THE SAID LAND AND THE FOLLOWING IS AN ACCURATE DESCRIPTION OF THE BOUNDARY LINES.

A PROPERTY LINE ADJUSTMENT BETWEEN THOSE TRACTS OF LAND DESCRIBED WITHIN DOCUMENT NO. 201801018 AND DOCUMENT NO. 201740291 OF THE OFFICIAL RECORDS IN JACKSON COUNTY, OREGON, BEING MORE PARTICULARLY DESCRIBED AND BOUNDED AS FOLLOWS, TO WIT:
 PARCELS 1 AND PARCEL 2 OF PARTITION PLAT NO. P-8-2004, RECORDED ON DECEMBER 10, 2004 IN VOLUME 15, PAGE 89 OF THE RECORDS OF PARTITION PLATS IN JACKSON COUNTY, OREGON, FILED AS SURVEY NO. 18561 IN THE OFFICE OF THE JACKSON COUNTY SURVEYOR.

SURVEY NOTES:

- THE FOLLOWING ENCUMBRANCES DENOTED IN FIRST AMERICAN TITLE INSURANCE COMPANY ORDER NO. 7169-117671, WITH AN EFFECTIVE DATE OF FEBRUARY 12, 2013, BEING DOES NOT AFFECT THE SUBJECT TRACT, AND THEREFORE NOT SHOWN GRAPHICALLY ON THIS PLAT.
- SUBJECT TO THE LEASES AND ASSIGNMENTS THEREOF, WATER AND IRRIGATION RIGHTS, EASEMENTS FOR DITCHES AND CANALS AND REGULATIONS CONCERNING THE SAME.
- EASEMENT FOR TRANSMISSION AND DISTRIBUTION OF ELECTRICITY, TO BERBETT CALIFORNIA OREGON POWER COMPANY - VOLUME 421, PAGE 342 OF THE DEED RECORDS OF JACKSON COUNTY, OREGON.
- DEFERRED IMPROVEMENT AGREEMENT FOR FUTURE IMPROVEMENT TO TOLMAN CREEK ROAD - INSTRUMENT NO. P-8-6921 OF THE OFFICIAL RECORDS OF JACKSON COUNTY, OREGON.
- DEFERRED IMPROVEMENT AGREEMENT FOR FUTURE IMPROVEMENT TO RECORDS OF JACKSON COUNTY, OREGON.

TAX COLLECTOR'S STATEMENT:

ALL TAXES, FEES, ASSIGNMENTS OR OTHER CHARGES REQUIRED BY O.R.S. 22.025 HAVE BEEN PAID AS OF 3-28-19, 2019.
 Tax Collector: *James Head* DATE: 03/28/2019
 Assessor: *James Head* DATE

SURVEY NARRATIVE

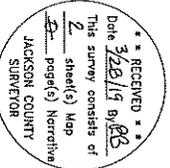
PURPOSE: TO SURVEY AND MONUMENT A PROPERTY LINE ADJUSTMENT OF THOSE TRACTS OF LAND DESCRIBED WITHIN INSTRUMENT NO. 201801018 AND DOCUMENT NO. 201740291 OF THE OFFICIAL RECORDS OF JACKSON COUNTY, OREGON, LYING SITUATE WITHIN THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 39 SOUTH, RANGE 1 EAST OF THE WILLAMETTE MERIDIAN, CITY OF ASHLAND, JACKSON COUNTY, OREGON.
 UTILIZING AN ELECTRONIC LEICA TS18 ROBOTIC TOTAL STATION WITH A SERIAL NUMBER OF THIS OFFICE DURING THE PERFORMANCE OF SURVEY NO. 18561, ON FILE IN THE OFFICE OF THE JACKSON COUNTY SURVEYOR. SURVEY AND MONUMENT THE PROPERTY LINE ADJUSTMENT AS SHOWN HERON AS APPROVED BY THE CITY OF ASHLAND PLANNING DEPARTMENT AND LOT 2 OF WHISTLE SUBDIVISION, A PROPERTY LINE ADJUSTMENT WAS PERFORMED BETWEEN SAID SAID LOTS 1 AND 2 IN 2004 AS DENOTED ON SURVEY NO. 18561 AND RE-ADJUSTED AGAIN HERON.

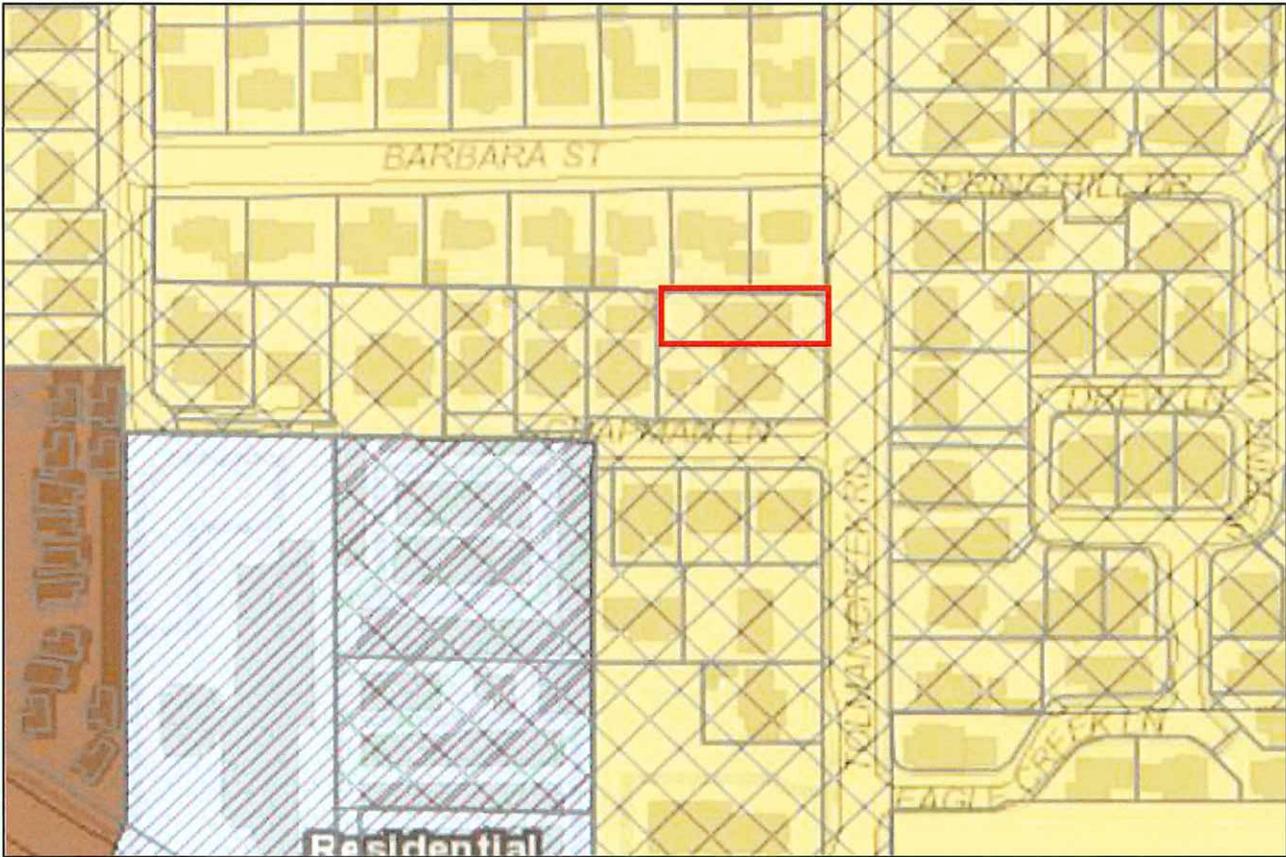
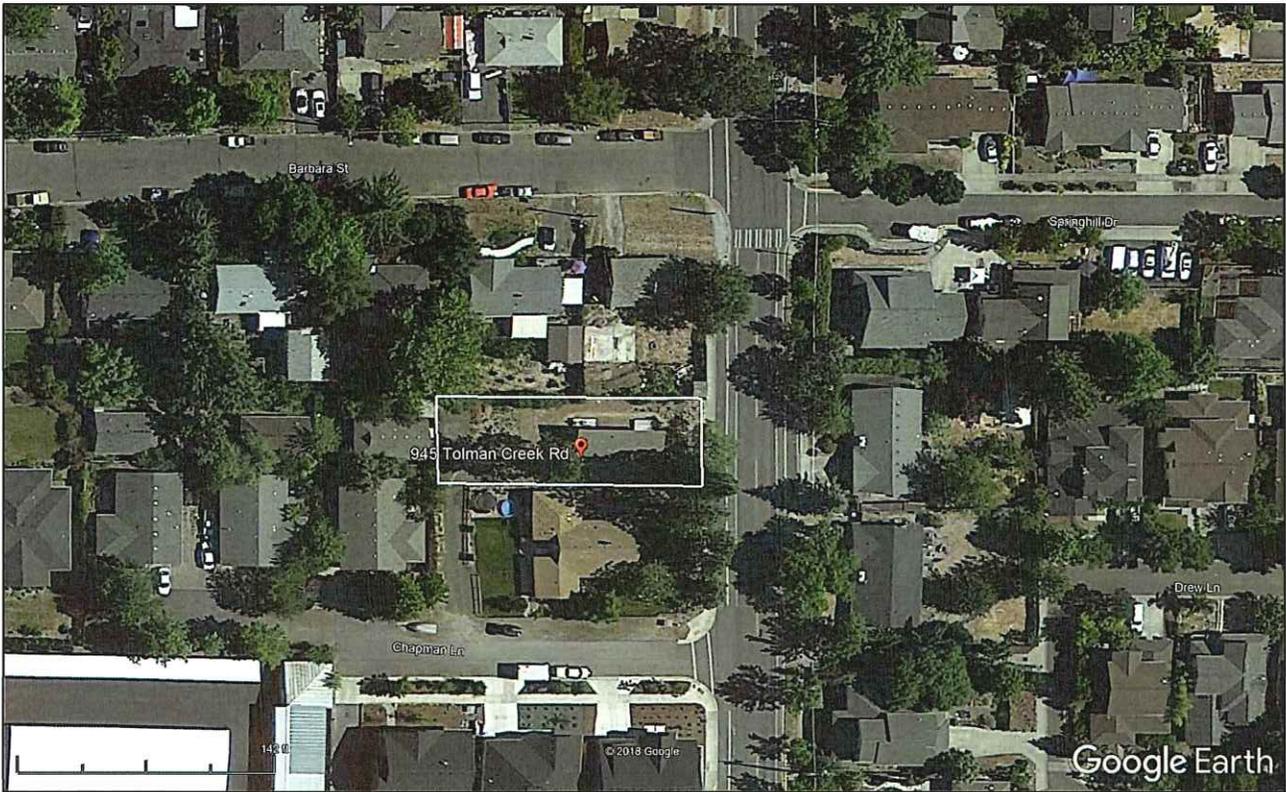
I HEREBY CERTIFY THAT THIS PLAT IS AN EXACT COPY OF THE ORIGINAL SURVEYOR

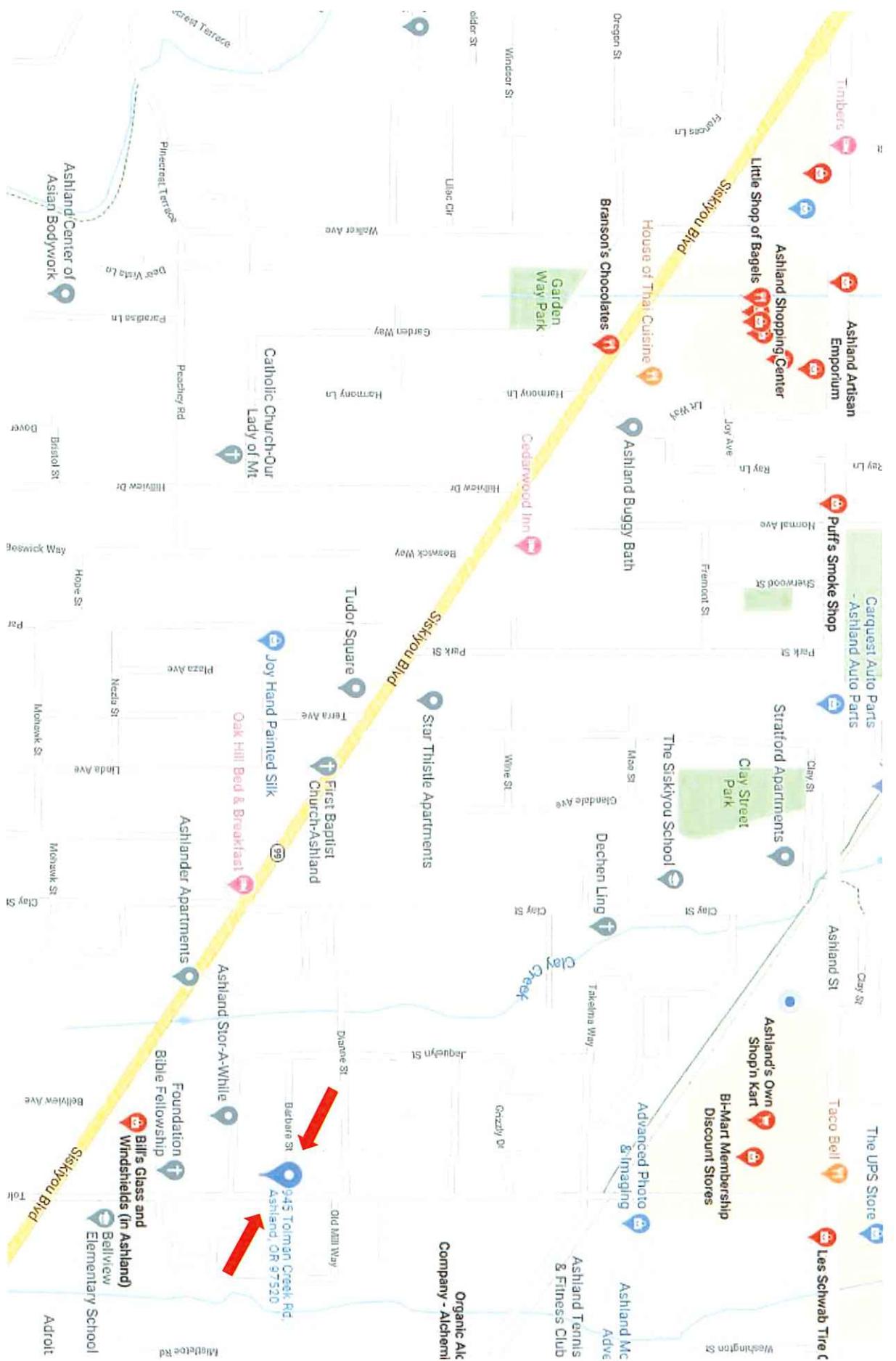
REGISTERED PROFESSIONAL LAND SURVEYOR
 SEAN DARRELL
 2008 1E

RENEWAL DATE: 6/30/2019

SURVEYED BY:
 POLARIS LAND SURVEYING LLC
 P.O. BOX 458
 ASHLAND, OREGON 97520
 (541) 482-5009
 DATE: FEBRUARY 11, 2019
 PROJECT NO. 1105-17







Timbers

Little Shop of Bagels

Ashland Shopping Center

Branson's Chocolates

House of Thai Cuisine

Ashland Buggy Bath

Cedarwood Inn

Puff's Smoke Shop

Carquest Auto Parts
Ashland Auto Parts

Stratford Apartments

Clay Street Park

The Siskiyou School

Dechen Ling

Ashland St

Ashland's Own Shop'n Kart

BI-Mart Membership Discount Stores

The UPS Store

Taco Bell

Les Schwab Tire C

Ashland Tennis & Fitness Club

Ashland Mc Advc

Advanced Photo & Imaging

Organic Alk Company - Alchemi

Catholic Church-Our Lady of Mt

Joy Hand Painted Silk

Oak Hill Bed & Breakfast

Ashlander Apartments

Bible Fellowship

Bill's Glass and Windshields (in Ashland)

Bellview Elementary School

Adroit

945 Tolman Creek Rd
Ashland, OR 97520

UNIT#1



UNIT#1



UNIT#1



UNIT#2 & Location of UNIT#3



UNIT#2 & Location of UNIT#3



Oregon Bond Residential Loan Program

Program Overview	<p>Oregon Housing and Community Services periodically issues tax exempt mortgage revenue bonds to be able to provide lower than market interest rate home loans to help first time homeowners in Oregon. The Oregon Bond Residential Loan Program provides below-market rates helping Oregon families achieve their home ownership goals while keeping their monthly payments affordable.</p> <p>The Program offers eligible borrowers a choice between Cash Advantage (Closing Cost) or Rate Advantage.</p> <ol style="list-style-type: none"> 1. Cash Advantage Borrowers will get a low fixed interest rate on their home loan along with cash assistance equal to 3% of their loan amount. The cash assistance will help reduce the total closing costs needed to purchase the home. Cash Advantage funds cannot be used for the minimum investment required for an FHA Loan. 2. Rate Advantage Eligible borrowers will get the lowest fixed rate possible to maximize their home purchasing power with an affordable payment. <p>Regardless of which pricing option they choose, the eligibility and program requirements are the same.</p>
Eligible Borrowers and Income	<p>The "annualized gross household income" cannot exceed the Program Limits established by Oregon Housing, governed by the Internal Revenue Service (IRS). The eligible income levels to qualify for this program are posted on our webpage here.</p> <p>An eligible borrower must be a first-time homebuyer or may not have held ownership in a principal residence during the three-year period prior to the date of the new mortgage. This requirement is waived if they are purchasing in a targeted area. A qualified homebuyer must be (or intend to be) an Oregon resident, and must agree to occupy the home being purchased as their primary residence. An applicant may not have been discharged from a bankruptcy within the past two years, or have had a real estate foreclosure within the last five years, prior to closing the program loan.</p>
Loan Types and Term	<p>The program consists of three (3) loan types: Federal Housing Administration (FHA insured), USDA Guaranteed Rural and Conventional Uninsured (loans that close with a loan-to-value of 80% or less). These funds may not be used to refinance an existing home loan.</p>
Eligible Property	<p>Program funds may be used to buy eligible housing anywhere in Oregon; for either newly constructed or existing homes. Eligible housing may include: site-built homes; qualified condominiums; units in a qualified Planned Unit Development; and manufactured housing permanently affixed to acceptable foundations. Manufactured housing must meet the appropriate insurers' requirements, which include a manufactured date after June 14, 1976, and have a living area of at least 400 square feet. Properties must meet the quality standards as determined by the mortgage insurer.</p>
Purchase Price Limits	<p>Depending on the location of the home being purchased, OHCS has established Purchase Price Limits which are governed by the IRS. Price limits are listed on our webpage here.</p>

Targeted Areas	The first-time homebuyer requirement is waived and there are higher Purchase Price Limits if the property being purchased is in a Targeted Area, and the borrower transfers any residential property previously owned prior to closing the Program Loan. Targeted and non-targeted areas are listed on our webpage here .
Recapture Fee	<p>The program is funded through the sale of federally authorized tax-exempt bonds. Borrowers who finance a home purchase with the program and then sell the home within nine years could be subject to a Recapture fee if both the borrower and the sale price exceed certain guidelines.</p> <p>The requirements for the fee are established by the Internal Revenue Service as described in IRS Form #8828. If a Recapture Fee is due when the house is sold, it is paid to the IRS, not the State of Oregon, when the borrower files their federal taxes. Borrowers who use the Oregon Bond Residential Loan Program receive a full notice of disclosure regarding the Recapture Fee at time of application with an approved lender. The Recapture fee is only relevant if the borrower’s annual income exceeds the applicable income limit for the year in which the home is sold and if there is a profit (“gain” for tax purposes) over their acquisition cost.</p> <p>For more details please see our “Notice to Borrowers Regarding Recapture Provision” at http://www.oregon.gov/ohcs/pages/oregon-bond-program-lender-manual-forms.aspx</p>
For More Information	Visit our website , or contact us at (503) 986-2000

Income Limits

About the Program

Oregon Housing and Community Services periodically issues tax exempt mortgage revenue bonds to be able to provide lower than market interest rate home loans to help first time homeowners in Oregon. The Oregon Bond Residential Loan Program provides below-market rates helping Oregon families achieve their home ownership goals while keeping their monthly payments affordable.

Income Limits

OHCS has established **Income Limits** (listed at right) for households that would qualify for the Oregon Bond Residential Loan program.

How to Qualify

To apply, simply contact one of our participating lenders and they will assist you in getting pre-qualified for one of our home loans.

Find a participating lender at:

<https://o.hcs.state.or.us/lenders/lenderlocator.jsp>

For more information, contact us at:

Oregon Housing and Community Services

725 Summer St. NE, Suite B, Salem, OR 97301-1266

PH (503) 986-2000

In Oregon, 1-877-788-2663

www.ohcs.oregon.gov

Revised 05-2018



County*	Income Limits Effective May 29, 2018			Targeted Area
	Non-Targeted Area		3 or More	
	1-2 Person	3 or More		
Baker	Non Applicable	Non Applicable	\$83,880	\$97,860
Benton	\$84,100	\$96,715	\$100,920	\$117,740
Clackamas,Columbia,Multnomah	\$97,680	\$112,460	\$97,680	\$113,960
Clatsop	Non Applicable	Non Applicable	\$83,880	\$97,860
Coos	Non Applicable	Non Applicable	\$83,880	\$97,860
Crook	Non Applicable	Non Applicable	\$83,880	\$97,860
Curry	\$69,900	\$80,385	\$83,880	\$97,860
Deschutes	\$81,139	\$93,310	Non Applicable	Non Applicable
Douglas	\$69,900	\$80,385	\$83,880	\$97,860
Gilliam	\$69,900	\$80,385	Non Applicable	Non Applicable
Grant	\$69,900	\$80,385	Non Applicable	Non Applicable
Harney	Non Applicable	Non Applicable	\$83,880	\$97,860
Hood River	\$82,560	\$96,320	Non Applicable	Non Applicable
Jackson	\$69,900	\$80,385	\$83,880	\$97,860
Jefferson	Non Applicable	Non Applicable	\$83,880	\$97,860
Josephine	Non Applicable	Non Applicable	\$83,880	\$97,860
Klamath	Non Applicable	Non Applicable	\$83,880	\$97,860
Lake	Non Applicable	Non Applicable	\$83,880	\$97,860
Lane	\$69,900	\$80,385	\$83,880	\$97,860
Lincoln	\$69,900	\$80,385	Non Applicable	Non Applicable
Linn	\$69,900	\$80,385	\$83,880	\$97,860
Malheur	Non Applicable	Non Applicable	\$83,880	\$97,860
Marion & Polk	\$69,900	\$80,385	\$83,880	\$97,860
Morrow	\$69,900	\$80,385	Non Applicable	Non Applicable
Sherman	\$69,900	\$80,385	Non Applicable	Non Applicable
Tillamook	\$69,900	\$80,385	Non Applicable	Non Applicable
Umatilla	\$69,900	\$80,385	\$83,880	\$97,860
Union	Non Applicable	Non Applicable	\$83,880	\$97,860
Wallowa	Non Applicable	Non Applicable	\$83,880	\$97,860
Wasco	\$69,900	\$80,385	Non Applicable	Non Applicable
Washington	\$97,680	\$112,460	Non Applicable	Non Applicable
Wheeler	Non Applicable	Non Applicable	\$83,880	\$97,860
Yamhill	\$97,680	\$112,460	Non Applicable	Non Applicable

Property Purchase Price Limits

About the Program

Oregon Housing and Community Services periodically issues tax exempt mortgage revenue bonds to be able to provide lower than market interest rate home loans to help first time homeowners in Oregon. The Oregon Bond Residential Loan Program provides below-market rates helping Oregon families achieve their home ownership goals while keeping their monthly payments affordable.

Property Purchase Price Limits

OHCS has established **Purchase Price Limits** (listed at right) which are governed by the Internal Revenue Service (IRS). Depending on the location of the home being purchased, the Purchase Price (acquisition cost) limits are effective May 3, 2018.

How to Qualify

To apply, simply contact one of our participating lenders and they will assist you in getting pre-qualified for one of our home loans.

Find a participating lender at:

<https://o.hcs.state.or.us/lenders/lenderlocator.jsp>

For more information, contact us at:

Oregon Housing and Community Services

725 Summer St. NE, Suite B, Salem, OR 97301-1266

PH (503) 986-2046

In Oregon, 1-877-788-2663

www.ohcs.oregon.gov

Revised 5/2018



County	Purchase Price Limits Effective May 3, 2018	
	Non-Targeted Area	Targeted-Area
Benton	\$328,235	\$401,177
Clackamas	\$412,942	\$504,706
Clatsop	Not Applicable	\$336,470
Columbia	\$412,942	\$504,706
Curry	\$301,765	\$368,823
Deschutes	\$344,118	Not Applicable
Hood River	\$418,235	Not Applicable
Jackson	\$278,471	\$340,353
Multnomah	\$412,942	\$504,706
Washington	\$412,942	Not Applicable
Yamhill	\$412,942	Not Applicable
All Other Counties	\$271,165	\$331,423

If the county is not specifically listed, use the "All Other Counties" figures.

Targeted Areas

The first-time homebuyer requirement is waived and there are higher Purchase Price Limits if the property being purchased is in a Targeted Area, and the borrower transfers any residential property previously owned prior to closing the Program Loan. Targeted Areas include Counties: Baker, Clatsop, Coos, Crook, Harney, Jefferson, Josephine, Klamath, Lake, Malheur, Union, Wallowa, and Wheeler; and Cities: (within the city limits of) Ashland, Milton-Freewater, Myrtle Creek, Port Orford, Silverton, Turner, and Vernonia; and portions of Albany, Corvallis, Eugene, Medford, Salem and Portland.

Sorted by Status (asc), Price (asc)

Listings as of 2/21/2020 11:35:40 AM

Property Type: Residential Include Property Subtype: Residential Area: Ashland Statuses: Active, Active-72HR Release, Active-Accepted SS, Pending, Sold (8/25/2019 or after) Price: 375,000 or less Bedrooms: 1.00 to 2.00 Total Bathrooms: 1.00 to 2.00 Page

Residential

Active

Address	City	Map	Bd	Bth	SqFt	LotSz	Year	Date	\$/SqFt	DOM/ CDOM	Orig Price	List Price
31 Clay Street	Ashland		2	2 (2 0)	789	0.1200 ac	1935	10/06/19	392.90	143/143	325,000	310,000
253 Quincy St	Ashland		2	1 (1 0)	1178	0.1100 ac	1913	02/19/20	297.11	2/2	350,000	350,000
Listings Count	2	Averages			984				345.01	72/72	337,500	330,000
					High	350,000			Low	310,000	Median	330,000

Pending

Address	City	Map	Bd	Bth	SqFt	LotSz	Year	Date	\$/SqFt	DOM/ CDOM	Orig Price	List Price
096 Creek Dr	Ashland		2	2 (2 0)	1206	0.0700 ac	2003	02/12/20	260.36	16/245	314,000	314,000
Listings Count	1	Averages			1206				260.36	16/245	314,000	314,000
					High	314,000			Low	314,000	Median	314,000

Sold

Address	City	Map	Bd	Bth	SqFt	LotSz	Year	Date	\$/SqFt	DOM/ CDOM	Orig Price	List Price	Sale Price	SP %
433 Old Siskiyou Hwy	Ashland		1	1 (1 0)	528	10.2400 ac	1991	11/20/19	549.24	28/28	300,000	300,000	290,000	96.
708 Parker St	Ashland		2	1 (1 0)	1014	0.1300 ac	1928	12/09/19	294.87	137/137	335,000	305,000	299,000	98.
95 Oak Knoll Dr	Ashland		2	2 (2 0)	1338	0.1600 ac	1976	02/06/20	224.14	115/115	319,900	299,900	299,900	100.
146 Ashland Mine Rd	Ashland		1	1 (1 0)	672	0.1800 ac	1950	09/20/19	468.01	99/99	365,000	319,000	314,500	98.
1301 Evan Ln	Ashland		2	1 (1 0)	908	0.1100 ac	1994	12/09/19	352.42	103/103	357,000	320,000	320,000	100.
1629 Parker St	Ashland		2	1 (1 0)	872	0.2200 ac	1951	12/23/19	366.97	9/9	319,950	319,950	320,000	100.
1639 Parker St	Ashland		2	1 (1 0)	858	0.1800 ac	1950	12/24/19	378.73	9/9	324,950	324,950	324,950	100.
150 C St	Ashland		2	1 (1 0)	1006	0.1000 ac	1978	02/14/20	357.63	137/137	400,000	375,000	359,780	95.
Listings Count	8	Averages			900				374	80/80	340,225	320,475	316,016	98.
					High	359,780			Low	290,000	Median	317,250		
Property Type Count	11	Averages			943				358.4	73/93	337,345	321,618	316,016	

Sorted by Status (asc), Price (asc)

Listings as of 2/21/2020 11:40:33 AM

Property Type: Residential Include Property Subtypes: Condominium, Residential, Townhouse Area: Ashland Statuses: Active, Active-72HR Release, Page
 Active-Accepted SS, Pending, Sold (8/25/2019 or after) Price: 375,000 or less Bedrooms: 1.00 to 2.00 Total Bathrooms: 1.00 to 2.00

Residential

Active

Address	City	Map	Bd	Bth	SqFt	LotSz	Year	Date	\$/SqFt	DOM/ CDOM	Orig Price	List Price	
131 Mountain Meadows	Ashland		1	1 (1 0)	736		ac 1999	12/07/18	237.77	441/441	210,000	175,000	
205 Ashland St #208	Ashland		1	1 (1 0)	915		ac 2008	10/28/19	207.65	65/65	190,000	190,000	
195 Tolman Creek Rd #	Ashland		2	2 (2 0)	988		ac 1990	01/27/20	253.04	25/25	250,000	250,000	
176 Golden Aspen Plac	Ashland		1	2 (1 1)	974		ac 2001	08/27/19	274.64	178/178	267,500	267,500	
128 Park St St	Ashland		2	2 (1 1)	1234	0.0200	ac 2000	01/06/20	224.07	46/46	279,000	276,500	
123 Pavilion Pl	Ashland		2	2 (2 0)	1075		ac 2002	07/03/19	260.37	234/234	299,900	279,900	
131 Clay Street	Ashland		2	2 (2 0)	789	0.1200	ac 1935	10/06/19	392.90	143/143	325,000	310,000	
124 Van Ness Ave	Ashland		2	2 (1 1)	1134		ac 1995	02/08/20	290.12	13/13	329,000	329,000	
1295 Siskiyou Blvd	Ashland		1	1 (1 0)	882		ac 2003	02/19/20	385.49	2/2	340,000	340,000	
124 Pavilion Pl	Ashland		2	2 (2 0)	1323		ac 2002	07/03/19	260.70	235/235	354,900	344,900	
1156 Birchwood Ln	Ashland		2	2 (2 0)	1359	0.0900	ac 2000	08/14/19	257.54	191/191	375,000	350,000	
1253 Quincy St	Ashland		2	1 (1 0)	1178	0.1100	ac 1913	02/19/20	297.11	2/2	350,000	350,000	
197 Mariposa Ct	Ashland		2	2 (2 0)	1513		ac 2000	09/23/19	243.89	152/152	419,000	369,000	
Listing Count	13	Averages			1085				275.79	133/133	306,869	294,754	
					High	369,000			Low	175,000		Median	310,000

Pending

Address	City	Map	Bd	Bth	SqFt	LotSz	Year	Date	\$/SqFt	DOM/ CDOM	Orig Price	List Price	
130 Mountain Meadows	Ashland		1	1 (1 0)	879		ac 1999	02/19/20	159.14	166/166	206,000	139,882	
105 Mountain Meadows	Ashland		1	2 (1 1)	977		ac 1999	02/21/20	295.70	32/32	288,900	288,900	
1096 Creek Dr	Ashland		2	2 (2 0)	1206	0.0700	ac 2003	02/12/20	260.36	16/245	314,000	314,000	
102 Fair Oaks Ct	Ashland		2	2 (2 0)	1186		ac 2007	02/18/20	288.97	2/2	319,000	319,000	
Listing Count	4	Averages			1062				246.04	54/111	281,975	265,446	
					High	319,000			Low	139,882		Median	301,450

Sold

Address	City	Map	Bd	Bth	SqFt	LotSz	Year	Date	\$/SqFt	DOM/ CDOM	Orig Price	List Price	Sale Price	SP %
154 Twin Pines Cir #8	Ashland		2	1 (1 0)	896		ac 1964	12/31/19	189.73	43/43	175,000	175,000	170,000	97.
205 Ashland St #206	Ashland		1	1 (1 0)	902		ac 2008	10/02/19	210.64	328/328	245,000	199,000	190,000	95.
126 Mountain Meadows	Ashland		1	1 (1 0)	879		ac 1999	12/06/19	232.08	31/37	219,000	204,000	204,000	100.
17 California St	Ashland		2	2 (1 1)	896	0.0300	ac 2000	02/14/20	251.12	178/178	245,000	235,000	225,000	95.
19 California St	Ashland		2	2 (1 1)	960	871	sf 2000	10/15/19	234.38	97/97	235,000	230,000	225,000	97.
195 Chestnut St #16	Ashland		2	2 (1 1)	1102		ac 1967	08/29/19	205.08	110/110	248,500	235,000	226,000	96.
1254 McCall Dr	Ashland		2	2 (2 0)	1005	0.0200	ac 2006	01/17/20	243.78	112/112	268,000	250,000	245,000	98.
136 Fair Oaks Ct	Ashland		2	2 (2 0)	1120		ac 2007	10/30/19	250.00	245/245	318,000	289,000	280,000	96.
18 E Main St #2	Ashland		1	1 (1 0)	673		ac 1999	09/20/19	416.05	102/467	349,900	299,900	280,000	93.
132 Glenn St	Ashland		2	2 (2 0)	1396	0.0300	ac 1989	02/04/20	204.15	53/53	295,000	295,000	285,000	96.
1433 Old Siskiyou Hwy	Ashland		1	1 (1 0)	528	0.2400	ac 1991	11/20/19	549.24	28/28	300,000	300,000	290,000	96.
1708 Parker St	Ashland		2	1 (1 0)	1014	0.1300	ac 1928	12/09/19	294.87	137/137	335,000	305,000	299,000	98.
195 Oak Knoll Dr	Ashland		2	2 (2 0)	1338	0.1600	ac 1976	02/06/20	224.14	115/115	319,900	299,900	299,900	100.
124 E Main St	Ashland		2	2 (1 1)	1097		ac 1979	02/14/20	273.47	108/108	320,000	300,000	300,000	100.
172 Glenn St	Ashland		2	2 (2 0)	1396	0.0500	ac 1989	09/09/19	218.48	107/107	342,000	310,000	305,000	98.
118 Fair Oaks Ct	Ashland		2	2 (2 0)	1260	0.0300	ac 2007	01/29/20	245.24	18/18	309,000	309,000	309,000	100.
1146 Ashland Mine Rd	Ashland		1	1 (1 0)	672	0.1800	ac 1950	09/20/19	468.01	99/99	365,000	319,000	314,500	98.
129 Boulder Creek Ln	Ashland		2	2 (1 1)	1096		ac 1997	10/02/19	290.15	100/100	324,900	319,900	318,000	99.
187 Golden Aspen Pl	Ashland		1	2 (1 1)	1186		ac 2001	10/11/19	269.81	293/293	360,000	327,000	320,000	97.
1301 Evan Ln	Ashland		2	1 (1 0)	908	0.1100	ac 1994	12/09/19	352.42	103/103	357,000	320,000	320,000	100.
1629 Parker St	Ashland		2	1 (1 0)	872	0.2200	ac 1951	12/23/19	366.97	9/9	319,950	319,950	320,000	100.
1639 Parker St	Ashland		2	1 (1 0)	858	0.1800	ac 1950	12/24/19	378.73	9/9	324,950	324,950	324,950	100.
150 C St	Ashland		2	1 (1 0)	1006	0.1000	ac 1978	02/14/20	357.63	137/137	400,000	375,000	359,780	95.
1140 Birchwood Ln	Ashland		2	2 (2 0)	1359	0.1200	ac 2000	09/24/19	268.58	2/2	375,000	375,000	365,000	97.
Listing Count	24	Averages			1017				291.45	107/122	306,296	288,192	282,297	97.
					High	365,000			Low	170,000		Median	299,450	
Property Type Count	41	Averages			1043				282.05	110/125	304,105	288,053	282,297	



Jackson County Residential Statistics

We Know Southern Oregon

JACKSON CO EXISTING HOME SALES - November 1, 2019 through January 31, 2020											
AREA	ACTIVITY		DAYS ON MKT		PRICING						
	Nov 1 - Jan 31		Nov 1 - Jan 31		Nov 1 - Jan 31					Jan 2019 vs Jan 2020	
	# Sold 2019	# Sold 2020	Average 2019	Average 2020	Median \$ 2015	Median \$ 2019	Median \$ 2020	5-year % Change	1-year % Change	Median \$	Median \$
Ashland	69	70	78	74	\$336,500	\$410,000	\$434,438	29.1%	6.0%	\$440,000	\$385,000
Talent	18	17	57	84	\$215,000	\$298,500	\$267,500	24.4%	-10.4%	N/A	\$265,000
Phoenix	10	20	49	47	\$222,500	\$277,150	\$283,500	27.4%	2.3%	\$285,000	N/A
Jacksonville	12	22	47	106	\$437,500	\$515,000	\$453,250	3.6%	-12.0%	N/A	\$456,500
Northwest Medford	21	15	38	30	\$152,450	\$260,000	\$270,000	77.1%	3.8%	\$253,000	\$267,250
West Medford	45	36	43	41	\$130,000	\$199,000	\$229,500	76.5%	15.3%	\$200,000	\$229,000
Southwest Medford	29	39	27	31	\$192,000	\$272,000	\$290,000	51.0%	6.6%	\$229,375	\$310,000
East Medford	172	178	49	55	\$220,000	\$306,500	\$299,750	36.3%	-2.2%	\$302,500	\$288,000
Central Point	73	83	35	43	\$180,000	\$259,990	\$304,900	69.4%	17.3%	\$258,000	\$288,950
White City	34	20	33	28	\$150,000	\$229,450	\$230,500	53.7%	0.5%	\$229,000	\$230,000
Eagle Point	30	39	41	34	\$240,000	\$285,000	\$279,210	16.3%	-2.0%	\$295,000	\$322,900
Shady Cove / Trail	11	9	69	54	\$177,445	\$278,000	\$285,000	60.6%	2.5%	\$267,500	N/A
Gold Hill & Rogue River	17	12	44	39	\$142,600	\$200,000	\$230,000	61.3%	15.0%	\$182,175	N/A
URBAN TOTALS	541	560	48	52	\$208,500	\$276,500	\$299,925	43.8%	8.5%	\$260,750	\$304,200

JACKSON CO NEW HOME SALES - November 1, 2019 through January 31, 2020											
AREA	ACTIVITY		DAYS ON MKT		PRICING						
	Nov 1 - Jan 31		Nov 1 - Jan 31		Nov 1 - Jan 31					Jan 2019 vs Jan 2020	
	# Sold 2019	# Sold 2020	Average 2019	Average 2020	Median \$ 2015	Median \$ 2019	Median \$ 2020	5-year % Change	1-year % Change	Median \$	Median \$
Ashland	1	5	N/A	154	\$449,593	N/A	\$450,000	0.1%	N/A	N/A	N/A
Talent	3	3	93	223	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Phoenix	1	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Jacksonville	4	1	1	N/A	\$291,500	\$650,000	N/A	N/A	N/A	N/A	N/A
Northwest Medford	0	6	N/A	105	\$229,142	N/A	\$245,500	7.1%	N/A	N/A	N/A
West Medford	2	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Southwest Medford	6	8	139	54	N/A	\$327,500	\$352,400	N/A	7.6%	N/A	N/A
East Medford	33	28	19	58	\$330,043	\$355,402	\$392,450	18.9%	10.4%	\$339,592	\$360,990
Central Point	7	4	22	94	\$232,500	\$342,900	\$396,858	70.7%	15.7%	N/A	N/A
White City	5	9	56	56	\$189,900	\$260,000	\$228,550	20.4%	-12.1%	N/A	N/A
Eagle Point	6	10	77	93	\$234,950	\$345,375	\$317,400	35.1%	-8.1%	N/A	N/A
Shady Cove / Trail	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Gold Hill & Rogue River	1	0	N/A	N/A	\$185,575	N/A	N/A	N/A	N/A	N/A	N/A
URBAN TOTALS	69	74	44	80	\$246,183	\$343,305	\$342,300	39.0%	-0.3%	\$345,950	\$337,377

JACKSON CO RURAL HOME SALES - November 1, 2019 through January 31, 2020											
ACREAGE	ACTIVITY		DAYS ON MKT		PRICING						
	Nov 1 - Jan 31		Nov 1 - Jan 31		Nov 1 - Jan 31					Jan 2019 vs Jan 2020	
	# Sold 2019	# Sold 2020	Average 2019	Average 2020	Median \$ 2015	Median \$ 2019	Median \$ 2020	5-year % Change	1-year % Change	Median \$	Median \$
Under 5 Acres	45	57	63	84	\$265,000	\$330,000	\$379,000	43.0%	14.8%	\$295,000	\$365,000
5 - 10 Acres	39	38	116	132	\$328,000	\$445,000	\$457,500	39.5%	2.8%	\$435,000	\$500,000
Over 10 Acres	19	29	147	182	\$420,000	\$458,000	\$605,000	44.0%	32.1%	\$599,000	\$460,000
RURAL TOTALS	103	123	98	122	\$304,250	\$390,000	\$400,000	31.5%	2.6%	\$392,000	\$400,000

ALL HOMES ON MARKET (includes rural)			
Area	Active 01/31/19	Active 01/31/20	% Change
Ashland	178	135	-24.2%
Talent	38	37	-2.6%
Phoenix	32	15	-53.1%
Jacksonville	54	35	-35.2%
Northwest Medford	17	8	-52.9%
West Medford	29	32	10.3%
Southwest Medford	55	30	-45.5%
East Medford	186	138	-25.8%
Central Point	78	40	-48.7%
White City	13	21	61.5%
Eagle Point	82	56	-31.7%
Shady Cove / Trail	37	31	-16.2%
Gold Hill & Rogue River	94	71	-24.5%

The statistics in the top two charts represent urban area homes and exclude rural properties. N/A means "No or Insufficient Activity" in the reporting period.

Median price means the midpoint, with half of the sales being above and half below the listed number; *it is not the same as average.*

Median prices reflect overall market trends and are not a measure of pricing for individual properties. Small sampling sizes can lead to wide variances in year to year comparisons.

Statistics are based on reporting by REALTORS® to the Southern Oregon Multiple Listing Service.

©2020 Southern Oregon MLS, a wholly owned subsidiary of the Rogue Valley Association of REALTORS®

JACKSON CO EXISTING HOME SALES: DISTRESSED - November 1, 2019 through January 31, 2020									
AREA	ACTIVITY		DAYS ON MKT		PRICING				
	Nov 1 - Jan 31		Nov 1 - Jan 31		Nov 1 - Jan 31			Jan 2019 vs Jan 2020	
	# Sold 2019	# Sold 2020	Average 2019	Average 2020	Median \$ 2019	Median \$ 2020	1-year % Change	Median \$	Median \$
Ashland	2	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Talent	1	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Phoenix	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Jacksonville	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Northwest Medford	0	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A
West Medford	3	0	44	N/A	N/A	N/A	N/A	N/A	N/A
Southwest Medford	3	0	23	N/A	N/A	N/A	N/A	N/A	N/A
East Medford	5	3	47	21	\$271,500	N/A	N/A	N/A	N/A
Central Point	2	4	N/A	64	N/A	\$266,950	N/A	N/A	N/A
White City	3	1	90	N/A	N/A	N/A	N/A	N/A	N/A
Eagle Point	1	4	N/A	19	N/A	\$215,000	N/A	N/A	N/A
Shady Cove / Trail	3	0	67	N/A	N/A	N/A	N/A	N/A	N/A
Gold Hill & Rogue River	1	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A
URBAN TOTALS	24	12	73	34	\$193,500	\$290,100	49.9%	\$182,788	N/A

JACKSON CO EXISTING HOME SALES: REO/SHORT SALE COMPARISONS - November 1, 2019 through January 31, 2020															
AREA	CLOSED TRANSACTIONS							AVERAGE DAYS ON MARKET				MEDIAN PRICING			
	Nov 1 - Jan 31							Nov 1 - Jan 31				Nov 1 - Jan 31			
	Normal	Normal %	REO	REO %	Short	Short %	All	Normal	REO	Short	All	Normal	REO	Short	All
Ashland	70	100.0%	0	0.0%	0	0.0%	70	74	N/A	N/A	74	\$434,438	N/A	N/A	\$434,438
Talent	17	100.0%	0	0.0%	0	0.0%	17	84	N/A	N/A	84	\$267,500	N/A	N/A	\$267,500
Phoenix	20	100.0%	0	0.0%	0	0.0%	20	47	N/A	N/A	47	\$283,500	N/A	N/A	\$283,500
Jacksonville	22	100.0%	0	0.0%	0	0.0%	22	106	N/A	N/A	106	\$453,250	N/A	N/A	\$453,250
Northwest Medford	15	100.0%	0	0.0%	0	0.0%	15	30	N/A	N/A	30	\$270,000	N/A	N/A	\$270,000
West Medford	36	100.0%	0	0.0%	0	0.0%	36	41	N/A	N/A	41	\$229,500	N/A	N/A	\$229,500
Southwest Medford	39	100.0%	0	0.0%	0	0.0%	39	31	N/A	N/A	31	\$290,000	N/A	N/A	\$290,000
East Medford	175	98.3%	3	1.7%	0	0.0%	178	55	N/A	N/A	55	\$297,000	N/A	N/A	\$299,750
Central Point	79	95.2%	4	4.8%	0	0.0%	83	42	64	N/A	43	\$304,900	\$266,950	N/A	\$304,900
White City	19	95.0%	1	5.0%	0	0.0%	20	29	N/A	N/A	28	\$231,000	N/A	N/A	\$230,500
Eagle Point	35	89.7%	3	7.7%	1	2.6%	39	36	N/A	N/A	34	\$285,000	N/A	N/A	\$279,210
Shady Cove / Trail	9	100.0%	0	0.0%	0	0.0%	9	54	N/A	N/A	54	\$285,000	N/A	N/A	\$285,000
Gold Hill & Rogue River	12	100.0%	0	0.0%	0	0.0%	12	39	N/A	N/A	39	\$230,000	N/A	N/A	\$230,000
URBAN TOTALS	548	97.9%	11	2.0%	1	0.2%	560	52	37	N/A	52	\$299,925	\$221,000	N/A	\$299,925

ALL HOMES ON MARKET (including rural) - 01/31/20							
AREA	Normal	Normal %	REO	REO %	Short	Short %	All
Ashland	132	97.8%	3	2.2%	0	0.0%	135
Talent	37	100.0%	0	0.0%	0	0.0%	37
Phoenix	14	93.3%	0	0.0%	1	6.7%	15
Jacksonville	34	97.1%	1	2.9%	0	0.0%	35
Northwest Medford	8	100.0%	0	0.0%	0	0.0%	8
West Medford	30	93.8%	1	3.1%	1	3.1%	32
Southwest Medford	29	96.7%	1	3.3%	0	0.0%	30
East Medford	135	97.8%	3	2.2%	0	0.0%	138
Central Point	39	97.5%	1	2.5%	0	0.0%	40
White City	20	95.2%	0	0.0%	1	4.8%	21
Eagle Point	56	100.0%	0	0.0%	0	0.0%	56
Shady Cove / Trail	30	96.8%	1	3.2%	0	0.0%	31
Gold Hill & Rogue River	70	98.6%	1	1.4%	0	0.0%	71
Other Areas	79	98.8%	1	1.3%	0	0.0%	80
COUNTY TOTALS	713	97.8%	13	1.8%	3	0.4%	729

REO/Short sales and inventories are not foreclosure rates.

"Normal" indicates properties that do not require third party approval for the transaction.

"REO" means Real Estate Owned, indicating bank or mortgage company ownership.

"Short" stands for Short Sale, where third party approval is required for the transaction.

Percentages of sales and inventories add up across the rows, but may not total exactly 100% due to rounding.

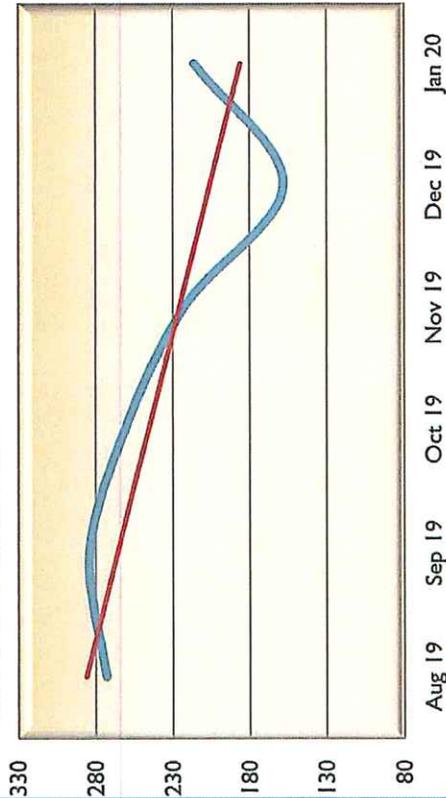
©2020 Southern Oregon MLS, a wholly owned subsidiary of the Rogue Valley Association of REALTORS®, Inc.



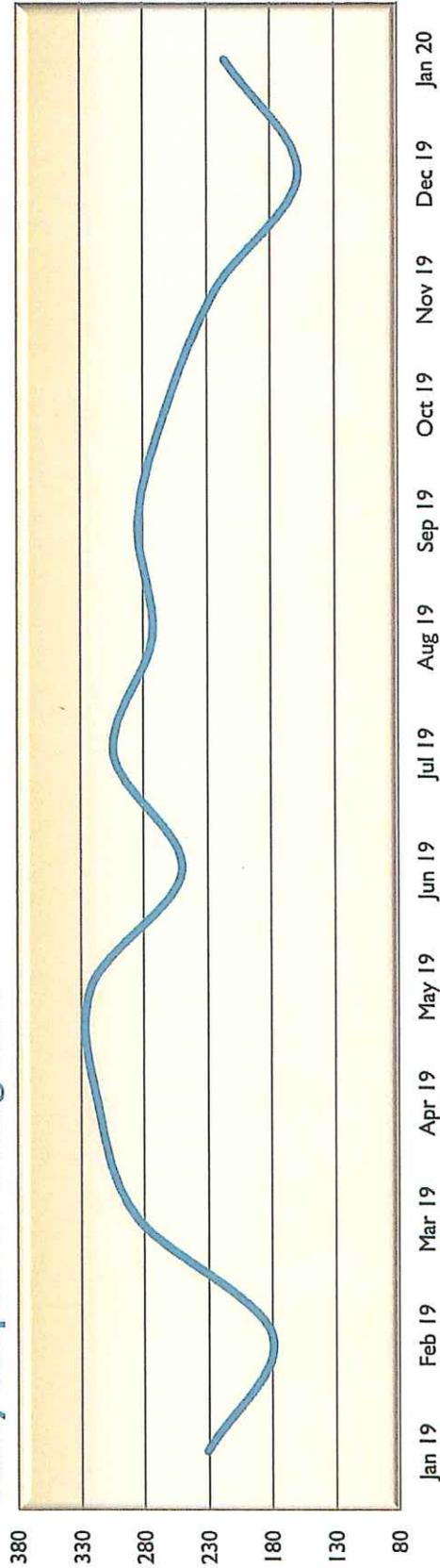
Pending Sales

Area	Jan 19	Jan 20	Change
Ashland	24	23	-4.2%
Talent	6	6	0.0%
Phoenix	4	2	-50.0%
Jacksonville	3	6	100.0%
Northwest Medford	10	10	0.0%
West Medford	18	16	-11.1%
Southwest Medford	12	18	50.0%
East Medford	84	68	-19.0%
Central Point	28	31	10.7%
White City	8	12	50.0%
Eagle Point	22	14	-36.4%
Shady Cove / Trail	5	5	0.0%
Gold Hill & Rogue River	7	5	-28.6%
COUNTY TOTALS	231	216	-6.5%

Six Month Trend

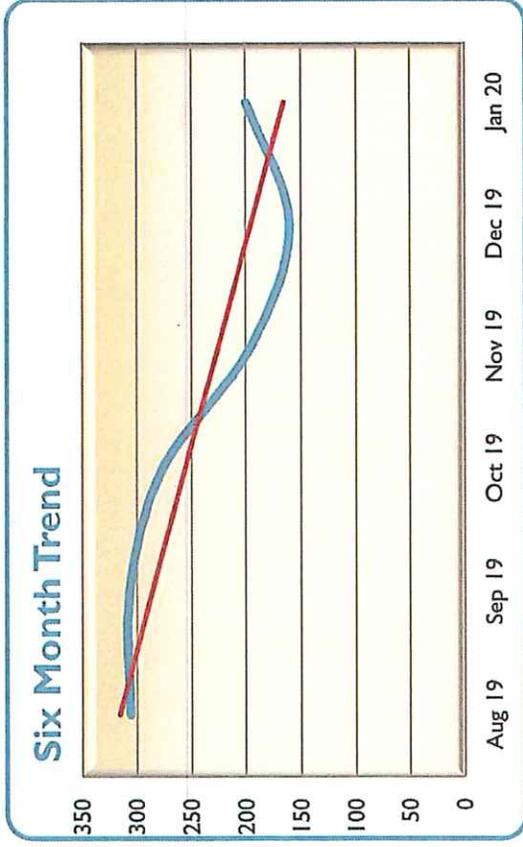


Yearly Snapshot: Pending Sales

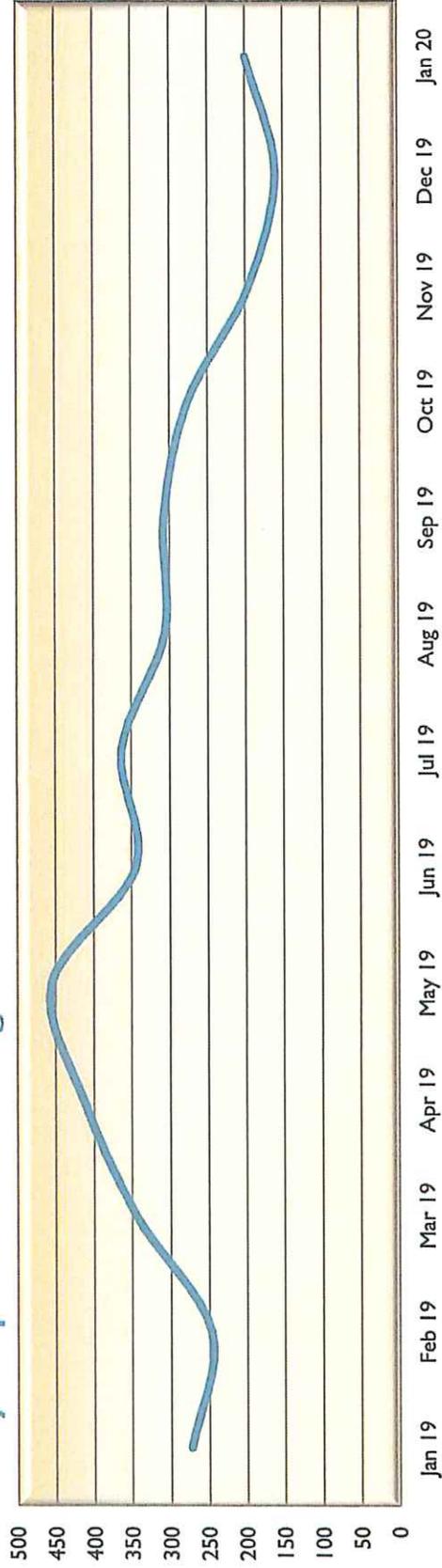


New Listings

Area	Jan 19	Jan 20	Change
Ashland	41	15	-63.4%
Talent	3	7	133.3%
Phoenix	8	2	-75.0%
Jacksonville	4	6	50.0%
Northwest Medford	11	11	0.0%
West Medford	19	15	-21.1%
Southwest Medford	14	18	28.6%
East Medford	85	58	-31.8%
Central Point	36	28	-22.2%
White City	5	10	100.0%
Eagle Point	23	15	-34.8%
Shady Cove / Trail	11	7	-36.4%
Gold Hill & Rogue River	13	8	-38.5%
COUNTY TOTALS	273	200	-26.7%

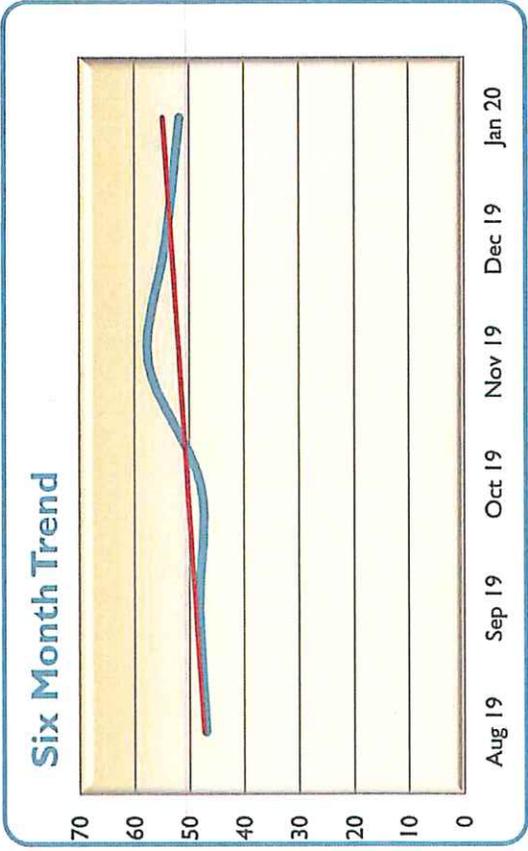


Yearly Snapshot: New Listings

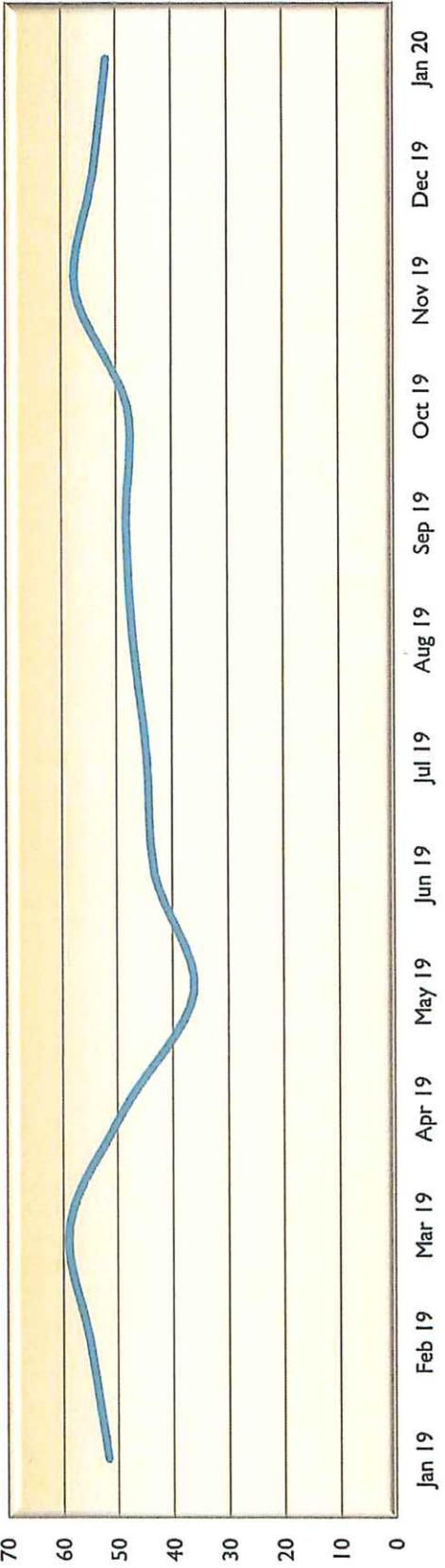


Average Days on Market

Area	Jan 19	Jan 20	Change
Ashland	87	41	-52.9%
Talent	102	49	-52.0%
Phoenix	60	128	113.3%
Jacksonville	21	72	242.9%
Northwest Medford	46	55	19.6%
West Medford	43	43	0.0%
Southwest Medford	62	33	-46.8%
East Medford	55	67	21.8%
Central Point	34	50	47.1%
White City	39	8	-79.5%
Eagle Point	23	40	73.9%
Shady Cove / Trail	113	148	31.0%
Gold Hill & Rogue River	23	56	143.5%
COUNTY TOTALS	52	52	0.0%

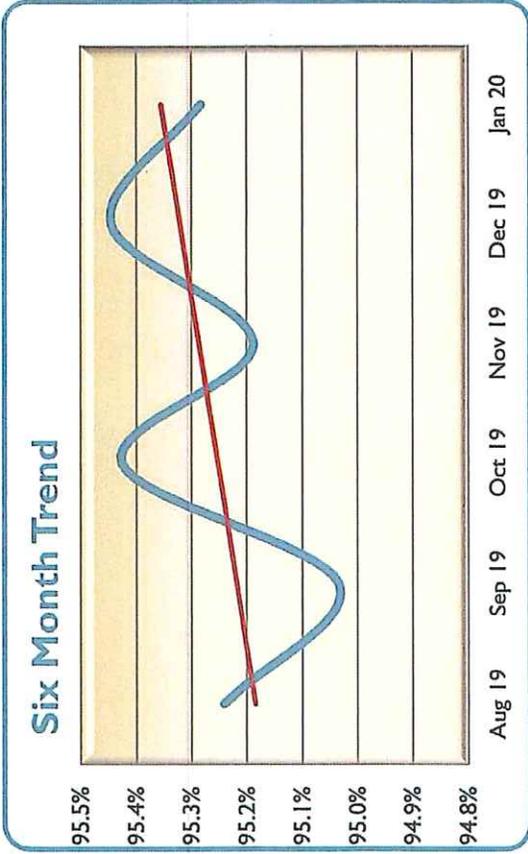


Yearly Snapshot: Average Days on Market

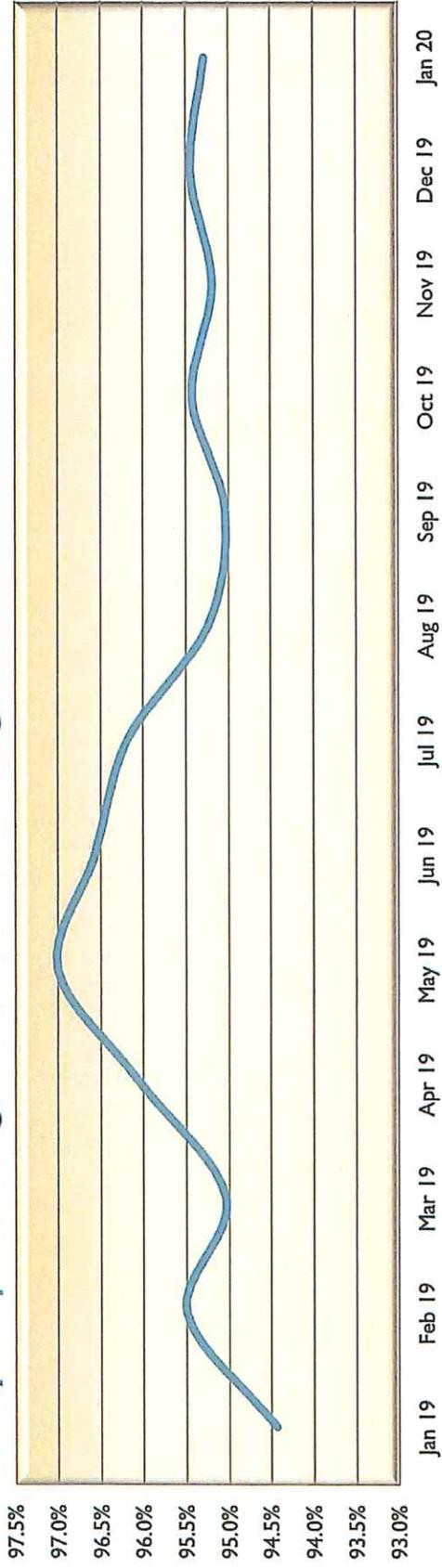


Original List Price vs Selling Price

Area	Jan 19	Jan 20	Change
Ashland	93.1%	97.7%	4.9%
Talent	93.1%	94.7%	1.7%
Phoenix	90.7%	93.3%	2.9%
Jacksonville	99.0%	93.7%	-5.4%
Northwest Medford	92.8%	97.3%	4.9%
West Medford	96.1%	99.3%	3.4%
Southwest Medford	99.6%	97.3%	-2.4%
East Medford	94.4%	94.0%	-0.5%
Central Point	95.9%	96.3%	0.5%
White City	97.3%	100.1%	2.9%
Eagle Point	91.9%	95.4%	3.8%
Shady Cove / Trail	90.2%	82.1%	-9.0%
Gold Hill & Rogue River	94.9%	96.6%	1.7%
COUNTY TOTALS	94.4%	95.3%	0.9%

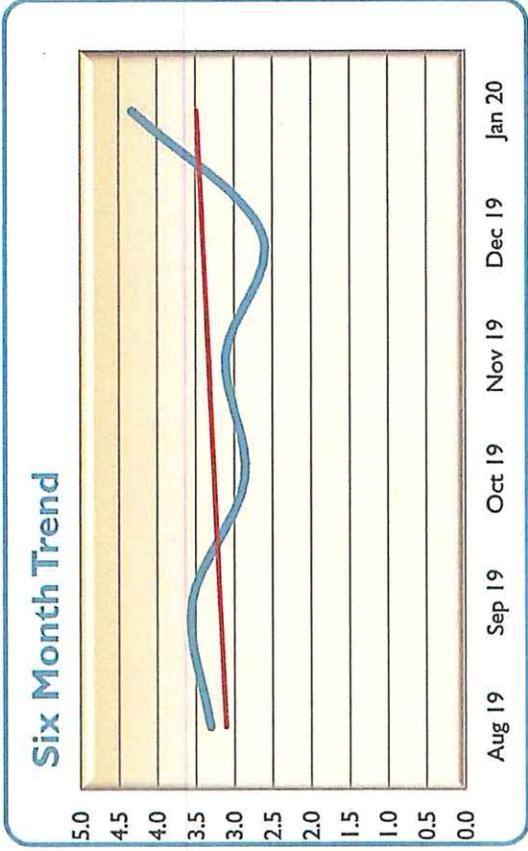


Yearly Snapshot: Original List Price vs Selling Price

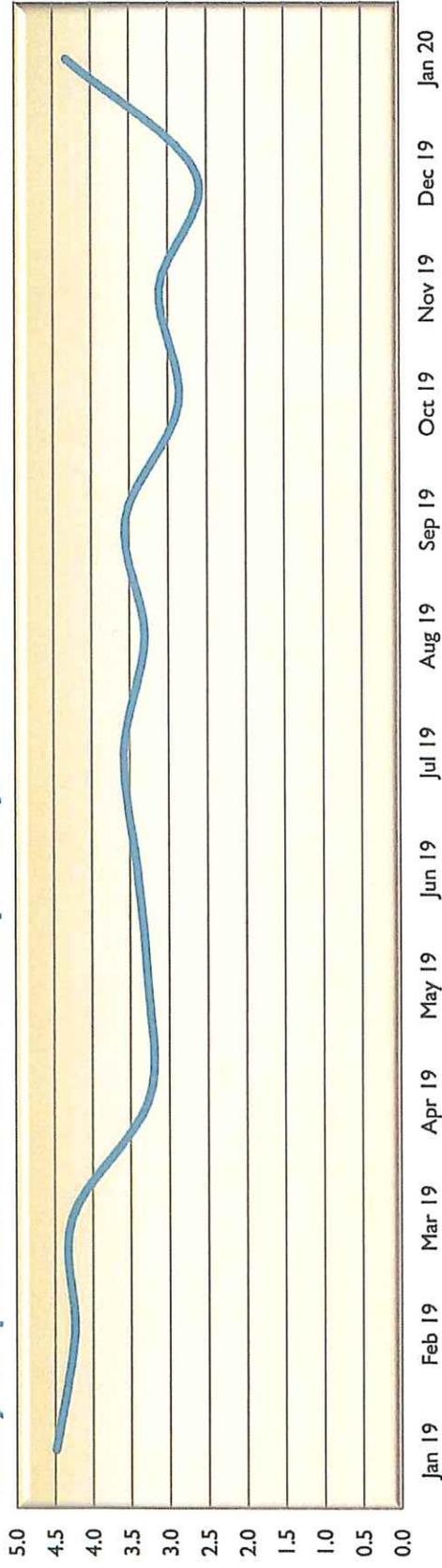


Available Homes per Buyer

Area	Jan 19	Jan 20	Change
Ashland	10.8	7.5	-30.4%
Talent	6.8	4.2	-37.8%
Phoenix	4.2	4.0	-4.8%
Jacksonville	13.5	3.6	-73.5%
Northwest Medford	4.2	4.8	14.0%
West Medford	3.5	6.7	89.8%
Southwest Medford	8.4	3.2	-62.3%
East Medford	3.9	3.8	-2.7%
Central Point	3.5	2.7	-21.3%
White City	1.0	4.1	314.3%
Eagle Point	8.3	4.2	-49.5%
Shady Cove / Trail	3.9	8.0	107.4%
Gold Hill & Rogue River	2.4	6.8	183.1%
COUNTY TOTALS	4.5	4.3	-3.4%

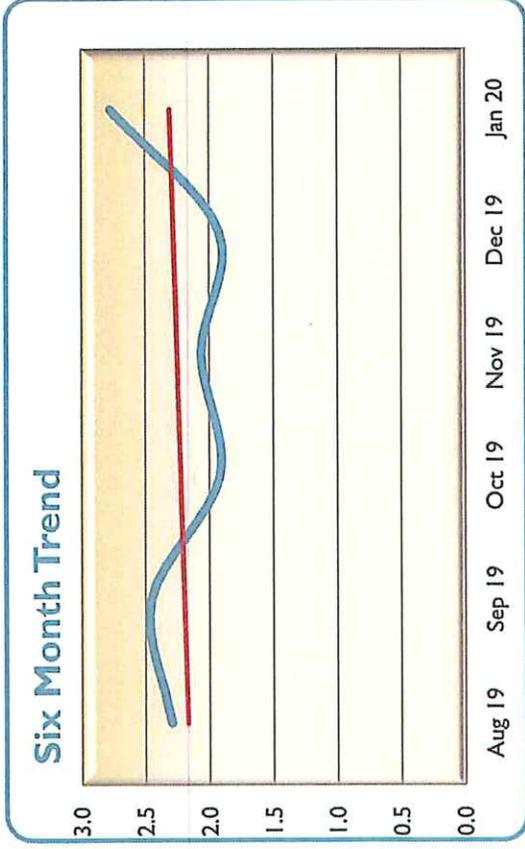


Yearly Snapshot: Available Homes per Buyer

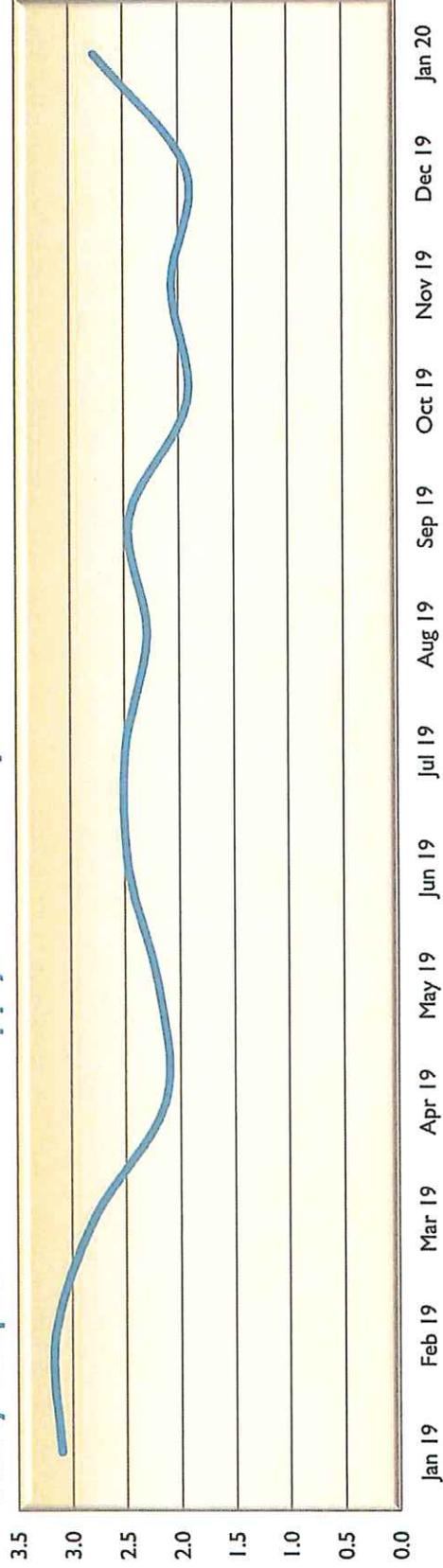


Months Supply of Inventory

Area	Jan 19	Jan 20	Change
Ashland	8.5	5.6	-33.9%
Talent	5.3	3.0	-42.9%
Phoenix	3.6	3.3	-7.4%
Jacksonville	12.0	2.7	-77.4%
Northwest Medford	2.7	2.3	-15.6%
West Medford	2.1	4.3	106.3%
Southwest Medford	6.0	1.7	-72.2%
East Medford	2.5	2.3	-7.8%
Central Point	2.2	1.3	-39.2%
White City	0.5	2.3	389.8%
Eagle Point	4.9	2.8	-42.0%
Shady Cove / Trail	3.1	6.0	90.9%
Gold Hill & Rogue River	2.0	5.5	175.0%
COUNTY TOTALS	3.1	2.8	-10.5%

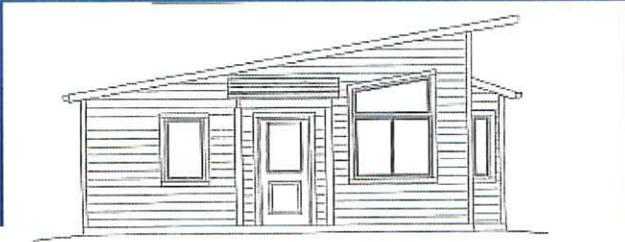


Yearly Snapshot: Months Supply of Inventory

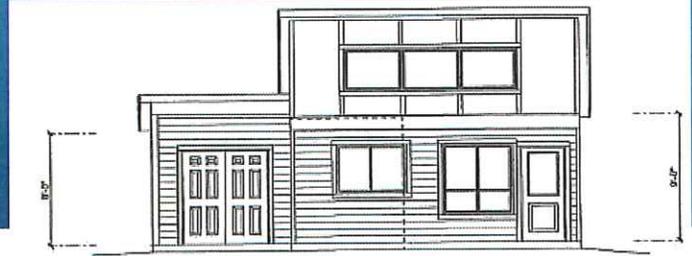


Tolman Creek Cottages

PA-T2-2019-00012 – A request for Outline & Final Plan Subdivision and Site Design Review approvals for a three-unit/four-lot Cottage Housing development at 945 Tolman Creek Road.



EAST ELEVATION
SCALE: 1/4" = 1'-0"



SOUTH ELEVATION UNIT #3
SCALE: 1/8" = 1'-0"

Proposal Details

Proposal

The existing home along Tolman Creek Road, pictured on the left above, is to be divided into two units, and a third 400 square foot cottage unit, pictured on the right above, is to be built at the rear of the property with access via the existing shared driveway over the property to the south and out to Chapman Lane. The property will include two open spaces areas – one along Tolman Creek Road and another at the center of the site, and each unit will also have private outdoor spaces in the form of garden areas, patios and decks.

Site Description

The subject property is an approximately 7,500 square foot rectangular parcel zoned R-1-5-P with frontage on Tolman Creek Road.

Landscaping & Trees

There are two large stature trees on the property: a 20-inch diameter Ponderosa Pine in the center of the site and a 41-inch Sequoia along Tolman Creek Road. Both trees are to be preserved and protected with the proposal.

Parking

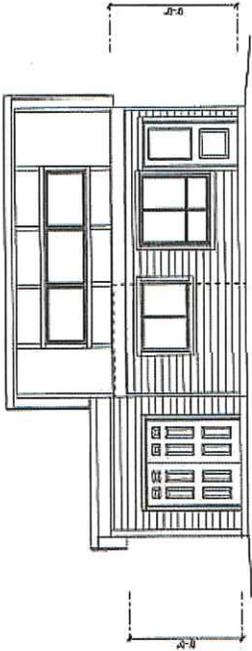
Cottage housing units less than 800 square feet require one off-street parking space be provided per unit. The applicant proposes to provide two off-street parking spaces at the rear of the property for the three units proposed here. The third required parking space is to be provided through an on-street credit for an available parking space along the property's frontage on Tolman Creek Road. Covered bicycle parking is to be provided in a structure at the rear of the property.

Staff Recommendation

Staff recommends that the application be approved with the conditions detailed in the draft findings included in the Planning Commission's January 2020 meeting packet.

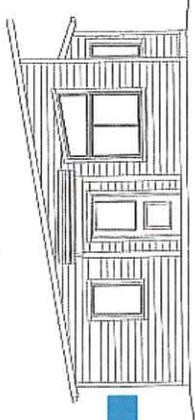
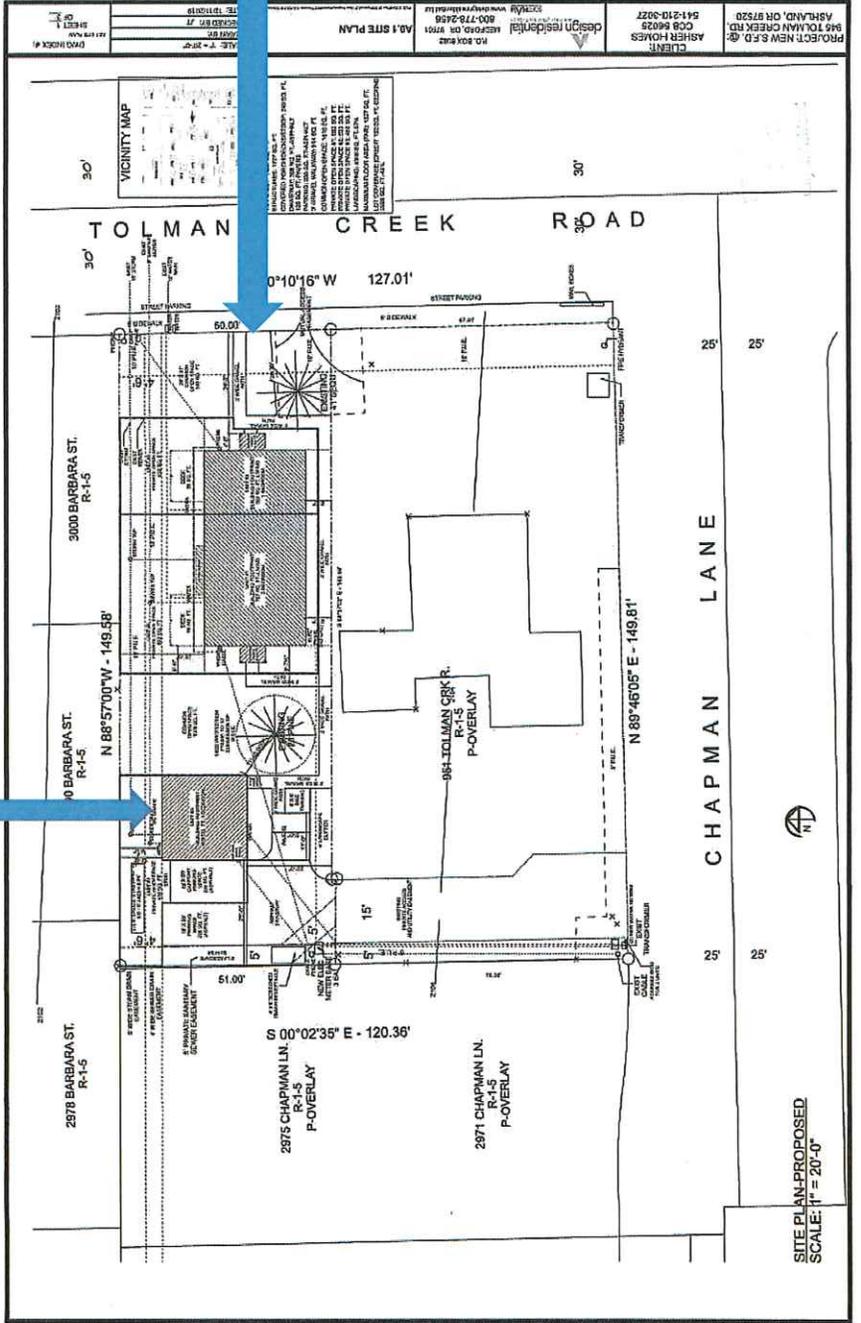
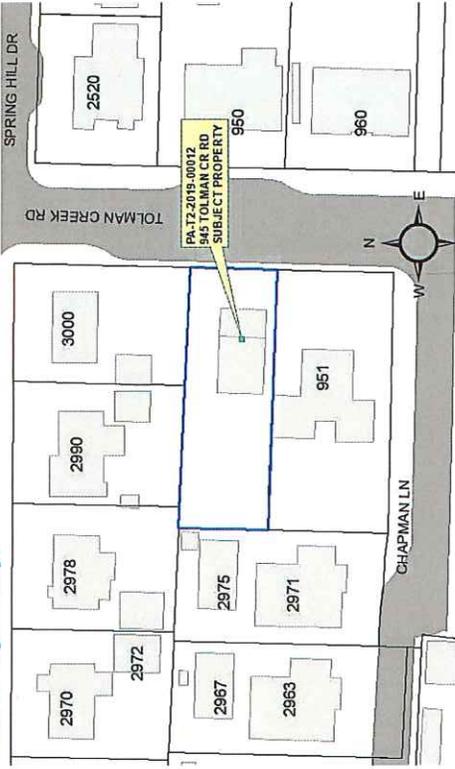
Tolman Creek Cottages

945 Tolman Creek Road



Proposed Third Unit SOUTH ELEVATION UNIT #3
SCALE: 1/8" = 1'-0"

Vicinity Map



EAST ELEVATION
SCALE: 1/4" = 1'-0"

Existing SFR to be converted to two units.

SITE PLAN-PROPOSED
SCALE: 1" = 20'-0"



CHAPMAN LANE

TOLMAN CREEK ROAD

3000 BARBARA ST.
R-1-5

2978 BARBARA ST.
R-1-5

2975 CHAPMAN LN.
R-1-5
P-OVERLAY

2971 CHAPMAN LN.
R-1-5
P-OVERLAY

945 TOLMAN CRK R.
P-OVERLAY

25' 25'

25' 25'

VICINITY MAP

PROJECT NEW S.F.D. @ 945 TOLMAN CREEK RD. ASHLAND, OR 97520	CLIENT ASHER HOMES 541-210-5027	DESIGN RESIDENTIAL 800-778-2428	RAI SITE PLAN
NO. BOX 8428	MEMPHIS, TN 38101	800-778-2428	DATE: 7-27-07
PROJECT NO. 07-001	DATE: 7-27-07	DATE: 7-27-07	DATE: 7-27-07

REVISIONS: 1. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT. 2. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT. 3. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT. 4. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT. 5. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT. 6. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT. 7. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT. 8. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT. 9. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT. 10. 07/27/07: REVISED PER COMMENTS FROM ASHLAND PLANNING DEPARTMENT.

Tolman Creek Cottages CITY OF ASHLAND
 945 Tolman Cr. Rd. Cottage Housing
 Planning Commission Hearing
 January 14, 2020

EAST ELEVATION
 SOUTH ELEVATION UNIT #3
 SCALE: 1/8" = 1'-0"

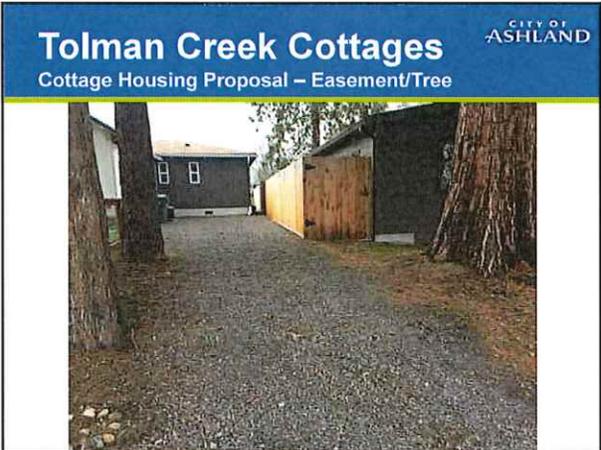
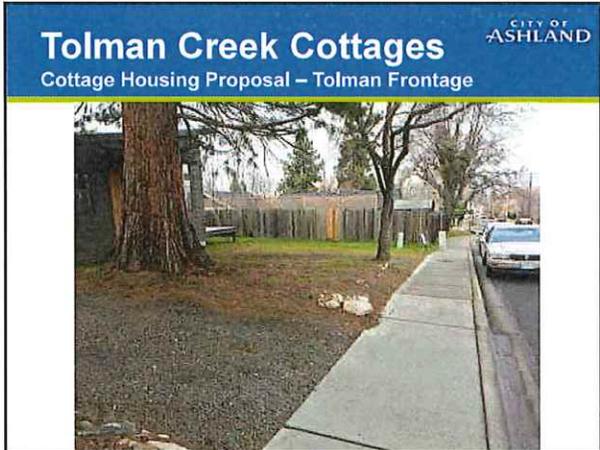
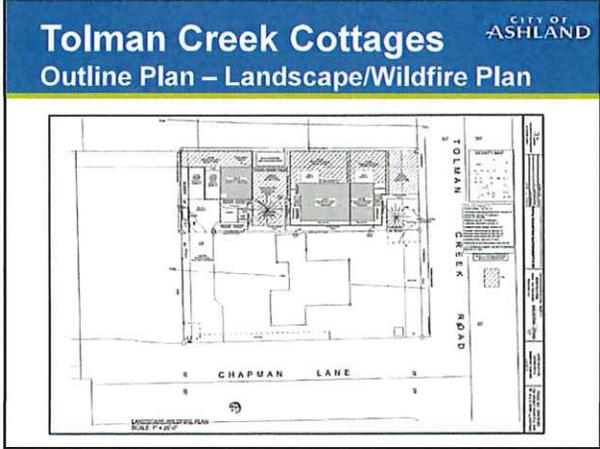
Tolman Creek Cottages CITY OF ASHLAND
 945 Tolman Cr Rd Vicinity Map

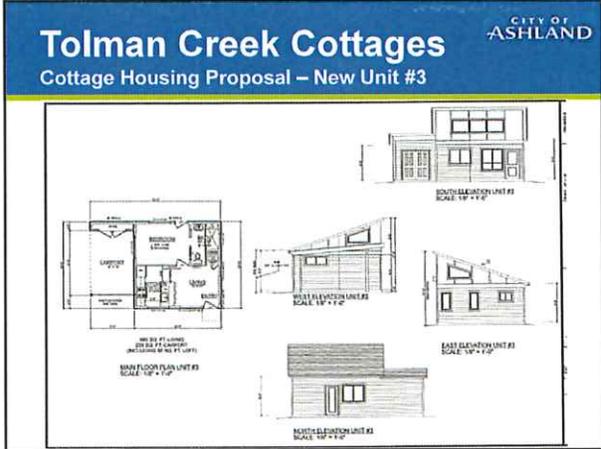
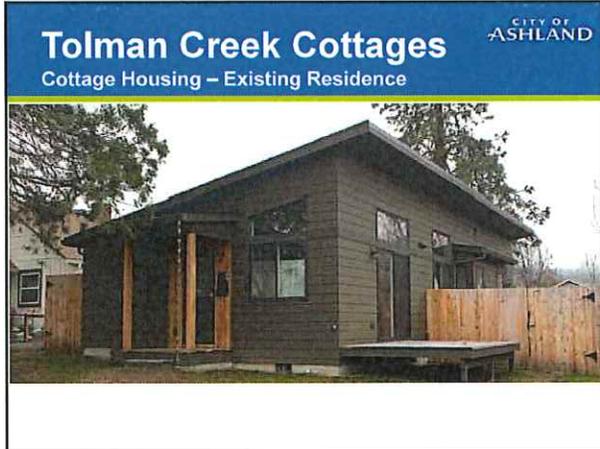
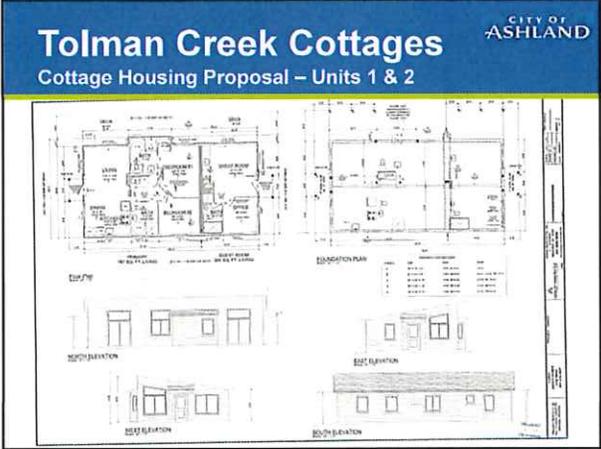
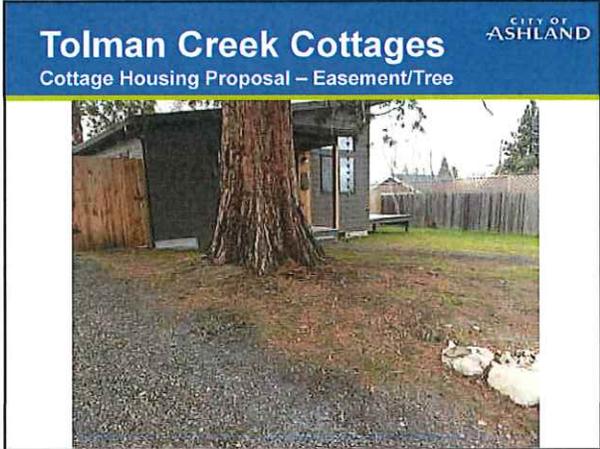
PA-12-2019-00013
 945 TOLMAN CR RD
 SUBJECT PROPERTY

Tolman Creek Cottages CITY OF ASHLAND
 Cottage Housing Proposal

- Outline & Final Plan approvals for a four-lot Performance Standards subdivision.
- Site Design Review approval for a three-unit Cottage Housing development. The existing single-family residence is to be divided into two units and a third 400 square foot cottage unit is to be constructed at the rear of the property.

Tolman Creek Cottages CITY OF ASHLAND
 Outline Plan – Proposed Site Plan





Tolman Creek Cottages CITY OF ASHLAND
 Cottage Housing Proposal – Tree Comm. Recommendation

The Tree Commission recommended approval of the application, with the recommendation that the applicant be required to include additional language in a revised Tree Protection Plan specifying those activities that are prohibited in the tree protection zone.

Per AMC 18.4.5.030.C.4-C.6, the following restrictions are to apply to Tree Protection Zones:

- No construction activity shall occur within the tree protection zone, including, but not limited to dumping or storage of materials such as building supplies, soil, waste items, equipment, or parked vehicles. *[This is already incorporated into the language of Condition #4.]*
- The tree protection zone shall remain free of chemically injurious materials and liquids such as paints, thinners, cleaning solutions, petroleum products, concrete or dry wall excess, and construction debris or run-off.
- No excavation, trenching, grading, root pruning, or other activity shall occur within the tree protection zone unless approved by the Staff Advisor.




Tolman Creek Cottages CITY OF ASHLAND
 Cottage Housing Proposal
 Planning Commission Hearing
 January 14, 2020



EAST ELEVATION
 SOUTH ELEVATION
 SCALE: 1/8" = 1'-0"

Tolman Creek Cottages CITY OF ASHLAND
 Cottage Housing Proposal – Staff Recommendation

Staff recommend approval with the conditions detailed in the draft findings in your packets.

February 12, 2020

Notice of Final Decision

The Ashland Planning Commission has approved the request for the following:

Planning Action: PA-T2-2019-00012

Subject Property: 945 Tolman Creek Rd.

Applicant: Sean Darrell/Rogue Planning & Development

Description: The application is request for a three-unit/four-lot Outline and Final Plan subdivision approval and Site Design Review permit to allow the construction of a three-unit Cottage Housing Development for the property at 945 Tolman Creek Road. The existing structure is proposed to be divided into two units, and a third 400 square foot cottage unit is to be constructed at the rear of the property. **COMPREHENSIVE PLAN DESIGNATION:** Single Family Residential; **ZONING:** R-1-5; **ASSESSOR'S MAP #:** 391E14CA; **TAX LOT:** 800

The Planning Commission's decision becomes final and effective ten days after this Notice of Final Decision is mailed. Approval is valid for a period of 18 months and all conditions of approval identified on the attached Findings are required to be met prior to project completion.

The application, all associated documents and evidence submitted, and the applicable criteria are available for review at the Ashland Community Development Department, located at 51 Winburn Way. Copies of file documents can be requested and are charged based on the City of Ashland copy fee schedule.

This decision may be appealed to the Ashland City Council if a Notice of Appeal is filed prior to the effective date of the decision and with the required fee (\$325), in accordance with section 18.5.1.060.I of the Ashland Municipal Code, which is also attached. The appeal may not be made directly to the Oregon Land Use Board of Appeals.

If you have any questions regarding this decision, please contact Derek Severson in the Community Development Department at (541) 488-5305.

cc: Sean Darrell
Rogue Planning & Development



SECTION 18.5.1.060.I

- I. Appeal of Type II Decision.** The City Council may call up a Type II decision pursuant to section 18.5.1.060.J. A Type II decision may also be appealed to the Council as follows.
1. Who May Appeal. Appeals may only be filed by parties to the planning action. "Parties" shall be defined as the following.
 - a. The applicant.
 - b. Persons who participated in the public hearing, either orally or in writing. Failure to participate in the public hearing, either orally or in writing, precludes the right of appeal to the Council.
 - c. Persons who were entitled to receive notice of the action but did not receive notice due to error.
 2. Appeal Filing Procedure.
 - a. *Notice of Appeal.* Any person with standing to appeal, as provided in subsection 18.5.1.060.I.1, above, may appeal a Type II decision by filing a notice of appeal and paying the appeal fee according to the procedures of this subsection.
 - b. *Time for Filing.* The notice of appeal shall be filed with the City Administrator within ten days of the date the notice of decision is mailed.
 - c. *Content of Notice of Appeal.* The notice shall include the appellant's name, address, a reference to the decision sought to be reviewed, a statement as to how the appellant qualifies as a party, the date of the decision being appealed, and a clear and distinct identification of the specific grounds for which the decision should be reversed or modified, based on identified applicable criteria or procedural irregularity.
 - d. The appeal requirements of this section must be fully met or the appeal will be considered by the City as a jurisdictional defect and will not be heard or considered.
 3. Mailed Notice. The City shall mail the notice of appeal together with a notice of the date, time, and place to consider the appeal by the City Council to the parties, as provided in subsection 18.5.1.060.H.1, at least 20 days prior to the meeting.
 4. Scope of Appeal.
 - a. Except upon the election to reopen the record as set forth in subsection 18.5.1.060.I.4.b, below, the review of a decision of the Planning Commission by the City Council shall be confined to the record of the proceeding before the Commission. The record shall consist of the application and all materials submitted with it; documentary evidence, exhibits, and materials submitted during the hearing or at other times when the record before the Commission was open; recorded testimony; (including DVDs when available), the executed decision of the Commission, including the findings and conclusions. In addition, for purposes of Council review, the notice of appeal and the written arguments submitted by the parties to the appeal, and the oral arguments, if any, shall become part of the record of the appeal proceeding.
 - b. *Reopening the Record.* The City Council may reopen the record and consider new evidence on a limited basis, if such a request to reopen the record is made to the City Administrator together with the filing of the notice of appeal and the City Administrator determines prior to the Council appeal hearing that the requesting party has demonstrated one or more of the following.
 - i. That the Planning Commission committed a procedural error, through no fault of the



- requesting party, that prejudiced the requesting party's substantial rights and that reopening the record before the Council is the only means of correcting the error.
- ii. That a factual error occurred before the Commission through no fault of the requesting party which is relevant to an approval criterion and material to the decision.
 - iii. That new evidence material to the decision on appeal exists which was unavailable, through no fault of the requesting party, when the record of the proceeding was open, and during the period when the requesting party could have requested reconsideration. A requesting party may only qualify for this exception if he or she demonstrates that the new evidence is relevant to an approval criterion and material to the decision. This exception shall be strictly construed by the Council in order to ensure that only relevant evidence and testimony is submitted to the hearing body.
 - iv. Re-opening the record for purposes of this section means the submission of additional written testimony and evidence, not oral testimony or presentation of evidence before the Council.
5. Appeal Hearing Procedure. The decision of the City Council is the final decision of the City on an appeal of a Type II decision, unless the decision is remanded to the Planning Commission.
- a. *Oral Argument.* Oral argument on the appeal shall be permitted before the Council. Oral argument shall be limited to ten minutes for the applicant, ten for the appellant, if different, and three minutes for any other party who participated below. A party shall not be permitted oral argument if written arguments have not been timely submitted. Written arguments shall be submitted no less than ten days prior to the Council consideration of the appeal. Written and oral arguments on the appeal shall be limited to those issues clearly and distinctly set forth in the notice of appeal; similarly, oral argument shall be confined to the substance of the written argument.
 - b. *Scope of Appeal Deliberations.* Upon review, and except when limited reopening of the record is allowed, the Council shall not re-examine issues of fact and shall limit its review to determining whether there is substantial evidence to support the findings of the Planning Commission, or to determining if errors in law were committed by the Commission. Review shall in any event be limited to those issues clearly and distinctly set forth in the notice of appeal. No issue may be raised on appeal to the Council that was not raised before the Commission with sufficient specificity to enable the Commission and the parties to respond.
 - c. *Council Decision.* The Council may affirm, reverse, modify, or remand the decision and may approve or deny the request, or grant approval with conditions. The Council shall make findings and conclusions, and make a decision based on the record before it as justification for its action. The Council shall cause copies of a final order to be sent to all parties participating in the appeal. Upon recommendation of the Administrator, the Council may elect to summarily remand the matter to the Planning Commission. If the Council elects to remand a decision to the Commission, either summarily or otherwise, the Commission decision shall be the final decision of the City, unless the Council calls the matter up pursuant to subsection 18.5.1.060.J.
6. Record of the Public Hearing. For purposes of City Council review, the notice of appeal and the written arguments submitted by the parties to the appeal, and the oral arguments, if any, shall become part of the record of the appeal proceeding.
- The public hearing record shall include the following information.
- a. The notice of appeal and the written arguments submitted by the parties to the appeal.



- b. Copies of all notices given as required by this chapter, and correspondence regarding the application that the City mailed or received.
 - c. All materials considered by the hearings body including the application and all materials submitted with it.
 - d. Documentary evidence, exhibits and materials submitted during the hearing or at other times when the record before the Planning Commission was open.
 - e. Recorded testimony (including DVDs when available).
 - f. All materials submitted by the Staff Advisor to the hearings body regarding the application;
 - g. The minutes of the hearing.
 - g. The final written decision of the Commission including findings and conclusions.
7. Effective Date and Appeals to State Land Use Board of Appeals. City Council decisions on Type II applications are final the date the City mails the notice of decision. Appeals of Council decisions on Type II applications must be filed with the State Land Use Board of Appeals, pursuant to ORS 197.805 - 197.860.



BEFORE THE PLANNING COMMISSION
February 11, 2020

IN THE MATTER OF PLANNING ACTION #PA-T2-2019-00012, A REQUEST FOR)
OUTLINE AND FINAL PLAN SUBDIVISION APPROVALS AND SITE DESIGN)
REVIEW FOR A 3-UNIT/4-LOT COTTAGE HOUSING DEVELOPMENT FOR THE)
PROPERTY AT 945 TOLMAN CREEK ROAD. THE EXISTING STRUCTURE IS) **FINDINGS,**
PROPOSED TO BE DIVIDED INTO 2-UNITS, AND A THIRD 400-SQUARE FOOT) **CONCLUSIONS**
COTTAGE UNIT IS TO BE CONSTRUCTED AT THE REAR OF THE PROPERTY.) **&**
) **ORDERS**
OWNER/APPLICANT: SEAN DARRELL/)
ROGUE PLANNING & DEVELOPMENT, LLC)
)

RECITALS:

- 1) Tax lot #800 of Map 39 1E 14CA is located at 945 Tolman Creek Road and is zoned Single Family Residential (R-1-5).
- 2) The application is request for a three-unit/four-lot Outline and Final Plan subdivision approval and Site Design Review permit to allow the construction of a three-unit Cottage Housing Development for the property at 945 Tolman Creek Road. The existing structure is proposed to be divided into two units, and a third 400 square foot cottage unit is to be constructed at the rear of the property. The proposal is outlined in plans on file at the Department of Community Development.
- 3) The criteria for Outline Plan approval are described in **AMC 18.3.9.040.A.3** as follows:
 - a. *The development meets all applicable ordinance requirements of the City.*
 - b. *Adequate key City facilities can be provided including water, sewer, paved access to and through the development, electricity, urban storm drainage, police and fire protection, and adequate transportation; and that the development will not cause a City facility to operate beyond capacity.*
 - c. *The existing and natural features of the land; such as wetlands, floodplain corridors, ponds, large trees, rock outcroppings, etc., have been identified in the plan of the development and significant features have been included in the open space, common areas, and unbuildable areas.*
 - d. *The development of the land will not prevent adjacent land from being developed for the uses shown in the Comprehensive Plan.*
 - e. *There are adequate provisions for the maintenance of open space and common areas, if required or provided, and that if developments are done in phases that the early phases have the same or higher ratio of amenities as proposed in the entire project.*
 - f. *The proposed density meets the base and bonus density standards established under this chapter.*
 - g. *The development complies with the Street Standards.*

4) The criteria for Final Plan approval are described in **AMC 18.3.9.040.B.5** as follows:

- a. *The number of dwelling units vary no more than ten percent of those shown on the approved outline plan, but in no case shall the number of units exceed those permitted in the outline plan.*
- b. *The yard depths and distances between main buildings vary no more than ten percent of those shown on the approved outline plan, but in no case shall these distances be reduced below the minimum established within this Ordinance.*
- c. *The open spaces vary no more than ten percent of that provided on the outline plan.*
- d. *The building size does not exceed the building size shown on the outline plan by more than ten percent.*
- e. *The building elevations and exterior materials are in conformance with the purpose and intent of this ordinance and the approved outline plan.*
- f. *That the additional standards which resulted in the awarding of bonus points in the outline plan approval have been included in the final plan with substantial detail to ensure that the performance level committed to in the outline plan will be achieved.*
- g. *The development complies with the Street Standards.*
- h. *Nothing in this section shall limit reduction in the number of dwelling units or increased open space provided that, if this is done for one phase, the number of dwelling units shall not be transferred to another phase, nor the open space reduced below that permitted in the outline plan.*

5) The criteria for Site Design Review approval are detailed in **AMC 18.5.2.050** as follows:

- A. **Underlying Zone:** *The proposal complies with all of the applicable provisions of the underlying zone (part 18.2), including but not limited to: building and yard setbacks, lot area and dimensions, density and floor area, lot coverage, building height, building orientation, architecture, and other applicable standards.*
- B. **Overlay Zones:** *The proposal complies with applicable overlay zone requirements (part 18.3).*
- C. **Site Development and Design Standards:** *The proposal complies with the applicable Site Development and Design Standards of part 18.4, except as provided by subsection E, below.*
- D. **City Facilities:** *The proposal complies with the applicable standards in section 18.4.6 Public Facilities and that adequate capacity of City facilities for water, sewer, electricity, urban storm drainage, paved access to and throughout the property and adequate transportation can and will be provided to the subject property.*
- E. **Exception to the Site Development and Design Standards.** *The approval authority may approve exceptions to the Site Development and Design Standards of part 18.4 if the circumstances in either subsection 1 or 2, below, are found to exist.*
 1. *There is a demonstrable difficulty meeting the specific requirements of the Site Development and Design Standards due to a unique or unusual aspect of an existing structure or the proposed use of a site; and approval of the exception will not substantially negatively impact adjacent properties; and approval of the exception is consistent with the stated purpose of the Site Development and Design; and the exception requested is the minimum which would alleviate the difficulty.; or*
 2. *There is no demonstrable difficulty in meeting the specific requirements, but granting the*

exception will result in a design that equally or better achieves the stated purpose of the Site Development and Design Standards.

6) The development standards for Cottage Housing Developments are detailed in **AMC 18.2.3.090** as follows:

C. Development Standards. Cottage housing developments shall meet all of the following requirements.

1. **Cottage Housing Density.** The permitted number of units and minimum lot areas shall be as follows:

Table 18.2.3.090.C.1 Cottage Housing Development Density					
Zones	Maximum Cottage Density	Minimum number of cottages per cottage housing development	Maximum number of cottages per cottage housing development	Minimum lot size (accommodates minimum number of cottages)	Maximum Floor Area Ratio (FAR)
R-1-5, NN-1-5 NM-R-1-5	1 cottage dwelling unit per 2,500 square feet of lot area	3	12	7,500 sq.ft.	0.35
R-1-7.5 NM-R-1-7.5	1 cottage dwelling unit per 3,750 square feet of lot area	3	12	11,250 sq.ft.	0.35

2. **Building and Site Design.**

a. **Maximum Floor Area Ratio:** The combined gross floor area of all cottages and garages shall not exceed a 0.35 floor area ratio (FAR). Structures such as parking carports, green houses, and common accessory structures are exempt from the maximum floor area calculation.

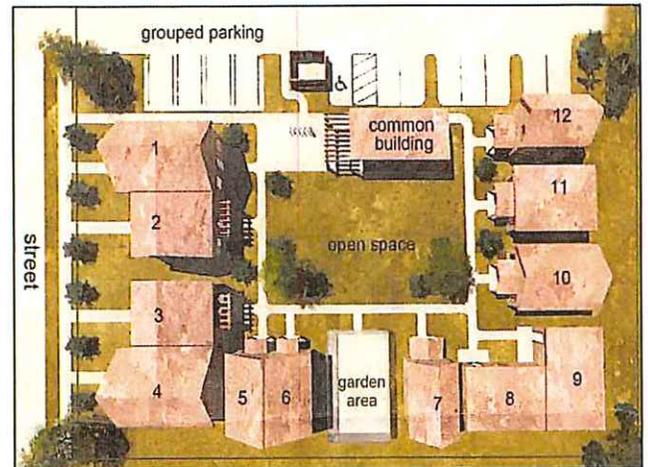
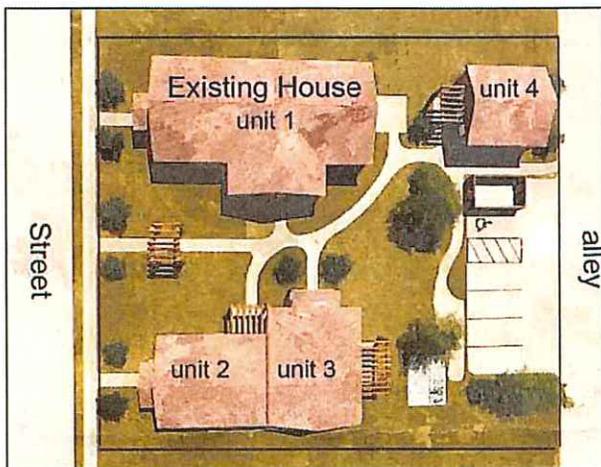
b. **Maximum Floor Area.** The maximum gross habitable floor area for 75 percent or more of the cottages, within developments of four units or greater, shall be 800 square feet or less per unit. At least two of the cottages within three unit cottage housing developments shall have a gross habitable floor area of 800 square feet or

less. The gross habitable floor area for any individual cottage unit shall not exceed 1000 square feet.

- c. **Height.** Building height of all structures shall not exceed 18 feet. The ridge of a pitched roof may extend up to 25 feet above grade.
 - d. **Lot Coverage.** Lot coverage shall meet the requirements of the underlying zone outlined in Table 18.2.5.030.A.
 - e. **Building Separation.** A cottage development may include two-unit attached, as well as detached, cottages. With the exception of attached units, a minimum separation of six feet measured from the nearest point of the exterior walls is required between cottage housing units. Accessory buildings (e.g., carport, garage, shed, multipurpose room) shall comply with building code requirements for separation from non-residential structures.
 - f. **Fences.** Notwithstanding the provisions of section 18.4.4.060, fence height is limited to four feet on interior areas adjacent to open space except as allowed for deer fencing in subsection 18.4.4.060.B.6. Fences in the front and side yards abutting a public street, and on the perimeter of the development shall meet the fence standards of section 18.4.4.060.
3. **Access, Circulation, and Off-Street Parking Requirements.** Notwithstanding the provisions of chapter 18.3.9 Performance Standards Option and 18.4 Site Development and Site Design Standards, cottage housing developments are subject to the following requirements:
- a. **Public Street Dedications.** Except for those street connections identified on the Street Dedication Map, the Commission may reduce or waive the requirement to dedicate and construct a public street as required in 18.4.6.040 upon finding that the cottage housing development meets connectivity and block length standards by providing public access for pedestrians and bicyclists with an alley, shared street, or multi-use path connecting the public street to adjoining properties.
 - b. **Driveways and parking areas.** Driveway and parking areas shall meet the vehicle area design standards of section 18.4.3.
 - i. Parking shall meet the minimum parking ratios per 18.4.3.040.
 - ii. Parking shall be consolidated to minimize the number of parking areas, and shall be located on the cottage housing development property.
 - iii. Off-street parking can be located within an accessory structure such as a multi-auto carport or garage, but such multi-auto structures shall not be attached to individual cottages. Single-car garages and carports may be attached to individual cottages. Uncovered parking is also permitted

provided that off street parking is screened in accordance with the applicable landscape and screening standards of chapter 18.4.4.

4. **Open Space.** Open space shall meet all of the following standards.
- A minimum of 20 percent of the total lot area is required as open space.
 - Open space(s) shall have no dimension that is less than 20 feet unless otherwise granted an exception by the hearing authority. Connections between separated open spaces, not meeting this dimensional requirement, shall not contribute toward meeting the minimum open space area.
 - Shall consist of a central space, or series of interconnected spaces.
 - Physically constrained areas such as wetlands or steep slopes cannot be counted towards the open space requirement.
 - At least 50 percent of the cottage units shall abut an open space.
 - The open space shall be distinguished from the private outdoor areas with a walkway, fencing, landscaping, berm, or similar method to provide a visual boundary around the perimeter of the common area.



g. Parking areas and driveways do not qualify as open space.

Figure 18.2.3.090 Cottage Housing Conceptual Site Plans

5. **Private Outdoor Area.** Each residential unit in a cottage housing development shall have a private outdoor area. Private outdoor areas shall be separate from the open space to create a sense of separate ownership.
- Each cottage unit shall be provided with a minimum of 200 square feet of usable

private outdoor area. Private outdoor areas may include gardening areas, patios, or porches.

b. *No dimension of the private outdoor area shall be less than 8 feet.*

6. Common Buildings, Existing Nonconforming Structures and Accessory Residential Units.

a. **Common Buildings.** *Up to 25 percent of the required common open space, but no greater than 1,500 square feet, may be utilized as a community building for the sole use of the cottage housing residents. Common buildings shall not be attached to cottages.*

b. **Carports and garage structures.** *Consolidated carports or garage structures, provided per 18.2.3.090.C.3.b, are not subject to the area limitations for common buildings.*

c. **Nonconforming Dwelling Units.** *An existing single-family residential structure built prior to the effective date of this ordinance (date), which may be nonconforming with respect to the standards of this chapter, shall be permitted to remain. Existing nonconforming dwelling units shall be included in the maximum permitted cottage density. 1,000 square feet of the habitable floor area of such nonconforming dwellings shall be included in the maximum floor area permitted per 18.2.3.090C.2.a. Existing garages, other existing non-habitable floor area, and the nonconforming dwelling's habitable floor area in excess of 1,000 square feet shall not be included in the maximum floor area ratio.*

d. **Accessory Residential Units.** *New accessory residential units (ARUs) are not permitted in cottage housing developments, except that an existing ARU that is accessory to an existing nonconforming single-family structure may be counted as a cottage unit if the property is developed subject to the provisions of this chapter.*

7. Storm Water and Low-Impact Development.

a. *Developments shall include open space and landscaped features as a component of the project's storm water low impact development techniques including natural filtration and on-site infiltration of storm water.*

b. *Low impact development techniques for storm water management shall be used wherever possible. Such techniques may include the use of porous solid surfaces in parking areas and walkways, directing roof drains and parking lot runoff to landscape beds, green or living roofs, and rain barrels.*

c. *Cottages shall be located to maximize the infiltration of storm water run-off. In this zone, cottages shall be grouped and parking areas shall be located to preserve as much contiguous, permanently undeveloped open space and native vegetation as*

reasonably possible when considering all standards in this chapter.

8. Restrictions.

- a. *The size of a cottage dwelling may not be increased beyond the maximum floor area in subsection 18.2.3.090.C.2.a. A deed restriction shall be placed on the property notifying future property owners of the size restriction.*

7) The Planning Commission, following proper public notice, held a public hearing on January 14, 2020 at which time testimony was received and exhibits were presented. Subsequent to the closing of the public hearing, the Planning Commission approved the application subject to conditions pertaining to the appropriate development of the site.

Now, therefore, the Planning Commission of the City of Ashland finds, concludes and recommends as follows:

SECTION 1. EXHIBITS

For the purposes of reference to these Findings, the attached index of exhibits, data, and testimony will be used.

Staff Exhibits lettered with an "S"

Proponent's Exhibits, lettered with a "P"

Opponent's Exhibits, lettered with an "O"

Hearing Minutes, Notices, Miscellaneous Exhibits lettered with an "M"

SECTION 2. FINDINGS & CONCLUSIONS

2.1 The Planning Commission finds that it has received all information necessary to make a decision based on the staff report, public hearing testimony and the exhibits received.

2.2 The Planning Commission finds that the proposal for Outline Plan approval, Final Plan approval, Site Design Review approval, and a Cottage Housing Development meets all applicable criteria for Outline Plan approval described in AMC 18.3.9.040.A.3; for Final Plan approval described in AMC 18.3.9.040.B.5; for Site Design Review described in AMC 18.5.2.050; and for a Cottage Housing Development described AMC 18.2.3.090.

2.3 The Planning Commission concludes that the proposal satisfies all applicable criteria for Outline Plan approval.

The first approval criterion for Outline Plan approval is that, *“The development meets all applicable ordinance requirements of the City.”* The Commission finds that the proposal meets all applicable ordinance requirements, is requesting no Variances or Exceptions, and that this criterion has been satisfied.

The second approval criterion for Outline Plan approval is that, *“Adequate key City facilities can be provided including water, sewer, paved access to and through the development, electricity, urban storm drainage, police and fire protection, and adequate transportation; and that the development will not cause a City facility to operate beyond capacity.”* The Commission notes that staff have indicated the following based on discussions with city utility departments:

Water, Sewer, Electricity and Urban Storm Drainage

Water – The Public Works Department has indicated that the property is currently served by a 12-inch water main in Tolman Creek Road. The water meter for the existing residence is at the curb along Tolman Creek Road, and two new water meters are illustrated as being placed at the driveway from Chapman Lane to serve the proposed new cottage units. The Public Works Department has indicated that the existing lines have the ability to provide capacity for the proposed development.

Sanitary Sewer - The Public Works Department has indicated that property is currently served by an eight-inch sanitary sewer main within the adjacent Tolman Creek Road right-of-way which connects to a line in the existing public utility easement that runs along the north property line, and that all of the individual units are able to be served from this main.

Electricity – The Electric Department has indicated that they have approved the project’s electric service plan, and that the applicant will be fully upgrading services to the site with a new three-pack meter base at the southwest corner of the property to be served underground via a new trench out to the transformer on Chapman Lane.

Urban Storm Drainage - The Public Works Department has indicated that property is currently served by an 18-inch storm sewer main in the adjacent Tolman Creek Road right-of-way which connects to a line in the existing public utility easement that runs along the north property line, and that all of the individual units are able to be served from this main. The applicant has proposed to install a 24-foot by eight-foot rainwater garden to detain roof drainage on site, with overflow into the storm drain system, as a low-impact approach to on-site detention and treatment.

Conditions have been included below requiring that final utility, grading and drainage plans and associated civil engineering drawings be provided for review and approval prior to site work or the issuance of building or excavation permits.

Police & Fire Protection

The applicant indicates that the property is now served by the Ashland Police Department (APD), and the proposal will not have an impact on the ability of APD to serve the property or the broader city. Existing fire hydrants are in place at the corner of the Tolman Creek Road and Chapman Lane, and at the corner of Tolman Creek Road and Spring Hill Drive. The application notes that none of the units is more than 150-feet from where a fire truck would park, and as such a fire truck turn-around will

not be necessary, and that the structures are less than 24-feet in height and no fire truck work area will be necessary. A condition has been included below to require that the applicants address the requirements of the Fire Department including but not limited to approved addressing, fire apparatus access, fire hydrant distance and fire flow, as part of the permit drawing submittals.

Paved Access and Adequate Transportation

Compliance with street standards is addressed under the appropriate criterion later in this section. With regard to paved access to and throughout the property and adequate transportation, the subject property directly fronts on Tolman Creek Road, a two-lane avenue/major collector street which was fully improved through a Local Improvement District in 2003. In addition, the property has an access easement through the property to the south, enabling a driveway connection to Chapman Lane, a lesser order street. Three small cottages do not generate enough vehicle trips to trigger a Traffic Impact Analysis and can be readily accommodated in the adjacent street system.

The site plan provided identifies existing facilities available in the adjacent rights-of-way along with proposed connections, meter placements, on-site stormwater detention placement, and the necessary utility extensions. The Planning Commission finds that based on the conceptual plans and details from the various service providers, adequate key city facilities are available within the adjacent rights-of-way and will be extended by the applicant to serve the proposed development. Conditions have been included below to require that final electric service, utility and civil plans be provided for the review and approval of the Staff Advisor and city departments in conjunction with the permit approval and plat review, and that infrastructure be installed by the applicants, inspected and approved prior to the signature of the final survey plat.

The third criterion for approval of an Outline Plan is that, *“The existing and natural features of the land; such as wetlands, floodplain corridors, ponds, large trees, rock outcroppings, etc., have been identified in the plan of the development and significant features have been included in the open space, common areas, and unbuildable areas.”* The Planning Commission finds that that the existing natural features on the property are limited to two large stature trees, and that they are identified in the plans and have been included in open spaces and unbuildable areas. A 20-inch Ponderosa Pine is within the proposed common open space, and a 41-inch Sequoia is not in an area of construction impacts. Both are to be protected in keeping with applicable standards.

The fourth criterion for approval of an Outline Plan is that, *“The development of the land will not prevent adjacent land from being developed for the uses shown in the Comprehensive Plan.”* The Planning Commission finds that the development will not prevent adjacent land from being developed with the uses envisioned by the Comprehensive Plan.

The fifth approval criterion is that, *“There are adequate provisions for the maintenance of open space and common areas, if required or provided, and that if developments are done in phases that the early phases have the same or higher ratio of amenities as proposed in the entire project.”* The Planning Commission finds that a “Covenants, Conditions and Restrictions (CC&R’s)” document will be provided to address maintenance of open spaces and common areas as part of the final survey plat review, and that the existing easement already in place to serve the commonly-owned parking addresses maintenance of

the driveway from Chapman Lane. Conditions requiring that draft CC&R's be included with the final survey plat submittal for final review and approval of the Staff Advisor have been included below. Based on the foregoing, the Commission concludes that the proposal complies with the fifth approval criterion.

The sixth criterion is that, "*The proposed density meets the base and bonus density standards established under this chapter.*" AMC Table 18.2.3.090.C.1 Cottage Housing Development Density addresses the permissible number of cottages for a cottage housing development in the R-1-5 zoning district providing that one cottage per 2,500 square feet of lot area is allowed, with a maximum number of 12 cottages. The Planning Commission finds that the 7,500 square foot property here will accommodate three cottages ($7,500/2,500 = 3$) and three are proposed which complies with the allowed Cottage Housing Development Density. Based on the foregoing, the Commission concludes that the proposal complies with the sixth approval criterion.

The final Outline Plan approval criterion is that, "*The development complies with the Street Standards.*" The subject property fronts on Tolman Creek Road, which is a two-lane avenue or major collector in this vicinity. City standards envision six- to ten-foot sidewalks, five- to eight-foot parkrow planting strips, a six-inch curb, eight- to nine-foot parking bays, six-foot bike lanes, and ten- to ten-and-a-half-foot travel lanes on each side. The city-standard cross-section includes a 32- to 33-foot curb-to-curb paved width within a 59- to 86-foot right-of-way, *dependent on the on-street parking configuration*. The existing curb-to-curb paved width along the frontage is approximately 32 feet, and the right-of-way width along the corridor is 60 feet. There are curbside sidewalks, curbs, gutters, parking in bays, bike lanes and two travel lanes in place along the property's frontage. The application notes that sidewalks were installed curbside with an Exception under the 2003 Tolman Creek Road Local Improvement District (LID), as provided in the Street Design Standards in AMC 18.4.6.040.A.2:

All streets [shall] have parkrows and sidewalks on both sides.... Exceptions could result in construction of meandering sidewalks, sidewalks on only one side of the street, or curbside sidewalk segments instead of setback walks. Exceptions should be allowed when physical conditions exist that preclude development of a public street, or components of the street. Such conditions may include... limited right-of-way when improving streets through a local improvement district (LID).

With the existing frontage improvements in place completed under the 2003 Tolman Creek LID, the applicant is not proposing any frontage improvements along Tolman Creek Road. Vehicular access to the site is to be from an access easement through the property to the south via a shared driveway out to Chapman Lane. The Commission finds that the existing street improvements were completed through an LID and that the proposal complies with city street standards.

The Planning Commission concludes that as detailed above and with the conditions discussed, the proposal complies with the requirements for Outline Plan subdivision approval under the Performance Standards Options chapter.

2.4 The Planning Commission finds that the Final Plan approval request has been made concurrently with the Outline Plan approval request, and as such there will be no variation between Outline Plan and Final Plan approvals.

2.5 The Planning Commission concludes that the proposal satisfies all applicable criteria for Site Design Review approval.

The first approval criterion addresses the requirements of the underlying zone, requiring that, *“The proposal complies with all of the applicable provisions of the underlying zone (part 18.2), including but not limited to: building and yard setbacks, lot area and dimensions, density and floor area, lot coverage, building height, building orientation, architecture, and other applicable standards.”* The Planning Commission finds that the building and yard setbacks and other applicable standards have been evaluated to ensure consistency with the applicable provisions of part 18.2, and all regulations of the underlying R-1-5 zoning will be satisfied.

The second approval criterion deals with overlay zones, and requires that, *“The proposal complies with applicable overlay zone requirements (part 18.3).”* The Planning Commission finds that the property is within the Performance Standards Option (PSO) overlay zone, which requires that all developments other than partitions or individual dwelling units be processed under Chapter 18.3.9., and that the proposal involves a three-unit cottage housing development and four-lot subdivision for which the applicant has requested Outline and Final Plan approval under the PSO Overlay Chapter 18.3.9. The Planning Commission finds that this criterion is satisfied.

The third criterion addresses the Site Development and Design Standards, requiring that *“The proposal complies with the applicable Site Development and Design Standards of part 18.4, except as provided by subsection E, below.”* The Planning Commission finds that the proposal complies with the applicable Site Development and Design Standards including provisions for access management, building orientation, parking configuration, etc. and that the various plans have been prepared based on these standards and the recently adopted Cottage Housing ordinance. With regard to the parking requirements in AMC 18.4.3, cottage housing units less than 800 square feet require one off-street parking space be provided per unit. The applicant proposes to provide two off-street parking spaces for the three proposed cottage units proposed here, with the third required space to be provided via an on-street credit for the frontage along Tolman Creek Road. Bicycle parking is to be provided with covered U-racks in a structure adjacent to the common area which will need to meet the requirements of AMC 18.4.3.070.C.1. The Planning Commission finds that all required parking has been provided through two off-street and one on-street spaces. The Planning Commission concludes that the third criterion has been satisfied.

The fourth approval criterion addresses city facilities, specifically requiring that, *“The proposal complies with the applicable standards in section 18.4.6 Public Facilities and that adequate capacity of City facilities for water, sewer, electricity, urban storm drainage, paved access to and throughout the property and adequate transportation can and will be provided to the subject property.”* The Planning Commission finds that adequate capacity of city facilities, paved access to and throughout the property, and adequate transportation can and will be provided to the subject property, and that these items are addressed in detail in the Outline Plan discussion in section 2.3 above. The Commission concludes that this criterion has been satisfied.

The final criterion for Site Design Review approval addresses "Exception to the Site Development and Design Standards." The Planning Commission finds that the proposal does not include any Exceptions to the Site Development and Design Standards, and as such this criterion does not apply.

The Planning Commission concludes that as detailed above and with the conditions discussed, the proposal complies with the requirements for Site Design Review approval.

2.5 The Planning Commission finds that concludes that the proposal satisfies all applicable standards specific to Cottage Housing Development.

The Planning Commission finds that the project involves the duplexing of an existing single family residence and the construction of a small third unit at the rear of the property, and will help to provide needed housing types while having minimal impact to the surrounding neighborhood.

The Planning Commission finds that no design standard Exceptions or Variances are proposed. The proposal complies with the allowed development density, floor area ratio, height and lot coverage standards, with three cottages proposed for a 7,500 square foot parcel and a combined floor area ratio of 0.23. All of the proposed cottages are less than 800 square feet in gross habitable floor area, with a combined average floor area of approximately 509 square feet. The existing residence is a single-story building, and the proposed new cottage is to have a peak height of 17-feet above grade, where the cottage housing standards allow roof peaks up to 25 feet from grade. Lot coverage is noted at 39.9 percent where up to 50 percent coverage is allowed.

The Commission further finds that the building separation between the existing structure and the new cottage is greater than the six-foot minimum.

A condition has been included below to requires that the CC&R's detail fencing limitations to demonstrate compliance with the limitations of the fence code and will not exceed four feet on interior areas adjacent to open space.

The Commission finds that the proposed cottage housing development is within an established neighborhood with Tolman Creek Road along the property frontage fully improved and a broader gridded street system largely in place and meeting block length standards in the vicinity.

The Commission finds that the driveway and parking area proposed meet the vehicle area design standards in AMC 18.4.3. Access to the site and parking will be from an existing shared driveway easement connecting across the property to the south to Chapman Lane. Two required parking off-street parking spaces are to be provided, and will be configured to allow cars to turn and exit to Chapman Lane in a forward manner and the third parking spaces is to be addressed through an on-street parking credit for the property's available frontage on Tolman Creek Road, where a parking bay is in place.

The Planning Commission finds that 21.57 percent of the site is proposed in open space, where a minimum of 20 percent is required. The proposed open space is provided in two connected areas with

no dimension is less than 20 feet one a 540 square foot space at the front of the property and the other a larger central space 1,075 square feet in area. All three of the proposed cottages directly abut the open space, and the open space is distinguished from private outdoor areas with a four-foot fencing to provide a visual boundary. Private open space areas, separate from the common open space, include garden areas, porches and patios to provide the requisite private outdoor areas.

The Commission finds that the development proposes an on-site water infiltration area in the form of a rain garden for Unit #3's roof drains along the north property line, and the back-up area and pathways are to be constructed on permeable materials to allow for retention, treatment and percolation on-site with overflow into an approved city facility. The cottages include a duplex created from the existing residence and a small stand-alone new cottage unit. The site layout includes consolidated parking to preserve open space, protect trees and reduce impervious surfaces.

Based on the foregoing, The Planning Commission concludes that, as detailed above and with the conditions discussed, the proposal is consistent with the Specific Cottage Housing Development Standards.

2.6 The Planning Commission finds that that the existing natural features on the property are two large stature trees, and that they are identified in the plans and have been included in open spaces and unbuildable areas. The 20-inch Ponderosa Pine is within proposed common open space, and the 41-inch Sequoia is not in an area of construction impacts and falls within an existing easement. Both are proposed to be protected in keeping with applicable standards using six-foot chain link fencing.

The Tree Commission reviewed the request and recommended approval of the application, with the recommendation that a final, revised Tree Protection Plan be included with additional language specifying those activities that are prohibited in tree protection zones (TPZ) as detailed in AMC 18.4.5.030.C.4-C.6, including that no construction activity occur within the TPZ, including but not limited to dumping or storage of materials such as building supplies, soil, waste items, equipment, or parking of vehicles; that the TPZ remain free of chemically injurious materials and liquids such as paints, thinners, cleaning solutions, petroleum products, concrete or dry wall excess, and construction debris or run-off; and that no excavation, trenching, grading, root pruning, or other activity occur within the TPZ unless approved by the Staff Advisor.

The Planning Commission concludes that as detailed above and with the conditions included below to require tree protection verification prior to any site work, the proposal complies with the requirements for Tree Protection.

SECTION 3. DECISION

3.1 Based on the record of the Public Hearing on this matter, the Planning Commission concludes that the proposal for Outline and Final Plan subdivision and Site Design Review approvals for a three-unit/four-lot Cottage Housing development is supported by evidence contained within the whole record.

The project involves the duplexing of an existing single family residence and the construction of a small third unit at the rear of the property, and will help to provide needed housing types while preserving the site's two existing large stature trees and having minimal impact to the surrounding neighborhood.

Therefore, based on our overall conclusions, and upon the proposal being subject to each of the following conditions, we approve Planning Action #PA-T2-2019-00012. Further, if any one or more of the conditions below are found to be invalid, for any reason whatsoever, then Planning Action #2019-00012 is denied. The following are the conditions and they are attached to the approval:

1. That all proposals of the applicant shall be conditions of approval unless otherwise modified herein.
2. That any new addresses shall be assigned by City of Ashland Engineering Department. Street and subdivision names are subject to City of Ashland Engineering Department review for compliance with applicable naming policies, and the unit accessed via the driveway from Chapman Lane will need a Chapman Lane address.
3. That permits shall be obtained from the Ashland Public Works Department prior to any work in the public right of way, including but not limited to permits for new driveway approaches, utility installation or any necessary encroachments.
4. That a Tree Verification Permit shall be applied for and approved by the Ashland Planning Division prior to any site work including excavation, staging or storage of materials, or excavation permit issuance. The Tree Verification Permit is to inspect the installation of tree protection fencing for the two trees to be protected. Standard tree protection consists of chain link fencing six feet tall and installed in accordance with the requirements of AMC 18.4.5.030.B. No construction shall occur within the tree protection zone including dumping or storage of materials such as building supplies, soil, waste, equipment, or parked vehicles.
5. That the pedestrian circulation routes through the property shall be at least four feet in width.
6. That prior to building or excavation permit issuance or any site work:
 - a. Final electric service, utility, grading and erosion control drawings including but not limited to the water, sewer, storm drainage, electric, and driveway improvements shall be provided for the review and approval of the Planning, Building, Electric and Public Works/Engineering Departments. The final utility plan shall include the location of connections to all public facilities including the locations of water lines and meter sizes, fire hydrants, sanitary sewer mains and services, manholes and clean-outs, and storm drainage pipes and catch basins. That final electric design and distribution plan including load calculations and locations of all primary and secondary services including transformers, cabinets and all other necessary equipment. This plan must be reviewed and approved by the Electric Department prior to the signature of the final survey plat. Any new transformers and cabinets shall be located in areas least visible from streets and outside of vision clearance areas, while considering the access needs of the Electric Department. Electric services shall be installed underground to serve all lots within the applicable phase prior to submittal of the final survey plat for review and signature. At the discretion of the Staff Advisor, a bond may be posted for the full amount of underground service installation (with necessary permits and connection fees paid) as an alternative to installation of service prior to signature of the final survey plat. In either case, the electric service plan shall be

PA-T2-2019-00012

February 11, 2020

Page 14

reviewed and approved by the Ashland Electric Department and Ashland Engineering Division prior to installation. Any required private or public utility easements shall be delineated on the civil plans. All civil infrastructure shall be installed by the applicants, inspected and approved prior to the submittal of the final survey plat for review and signature.

- b. Final site lighting details.
 - c. Final lot coverage calculations demonstrating how lot coverage is to comply with the applicable coverage allowances of the zoning district. Lot coverage includes all building footprints, driveways, parking areas and other circulation areas, and any other areas other than natural landscaping.
 - d. All easements including but not limited to public and private utilities, mutual access and circulation, and fire apparatus access shall be indicated on the plan submittal for review by the Planning, Engineering, Building and Fire Departments.
 - e. A final storm drainage plan shall detail the location and any necessary engineering for all storm drainage improvements associated with the project, and shall be submitted for review and approval by the Departments of Public Works, Planning and Building Divisions. The storm drainage plan shall demonstrate that post-development peak flows are less than or equal to the pre-development peak flow for the site as a whole, and that storm water quality mitigation has been addressed through the final design.
 - f. Any final grading and erosion control plan.
 - g. A final size- and species-specific landscaping plan including irrigation details and details of the landscape materials to be planted shall be provided for the review and approval of the Staff Advisor. New landscaping shall comply with the General Fuel Modification Area requirements and shall not include plants listed on the Prohibited Flammable Plant List adopted by Resolution #2018-028.
 - h. That the applicable requirements of the Ashland Fire Department relating to fire hydrant distance, spacing and clearance; fire flow; fire apparatus access, approach, turn-around, and firefighter access pathway; approved addressing; fire sprinkler and extinguishers as applicable; limits on fencing and gates which would impair access; and wildfire hazard area requirements shall be satisfactorily addressed. Fire Department requirements shall be included in the permit drawings, and shall include a final Fire Prevention and Control Plan addressing the General Fuel Modification Area requirements of AMC 18.3.10.100.A.2.
7. A final survey plat shall be submitted for the review and approval of the Staff Advisor within 12 months and approved by the City of Ashland within 18 months of this approval. Prior to submittal of the final subdivision survey plat for review and signature:
- a. The final survey plat shall include a deed restriction notifying future property owners that the size of a cottage dwelling may not be increased beyond the maximum floor area in subsection 18.2.3.090.C.2.a. This size limitation shall also be addressed in the development CC&R's.
 - b. All easements including but not limited to public and private utilities, mutual access, and fire apparatus access shall be indicated on the final survey plat as required by the Ashland Engineering Division.

- c. That draft CC&Rs for the Homeowner's Association shall be provided for review and approval of the Staff Advisor prior to final plat signature. The CC&R's shall describe responsibility for the maintenance of all common use-improvements including parking areas, landscaping and storm water facilities. The cottage housing fencing limitations, floor area limitations and the prohibition on ARU's shall be clearly addressed in the CC&R's.
- d. The approved Tree Protection Plan and accompanying standards for compliance shall be noted in the CC&Rs. The CC&Rs must state that deviations from the plan shall be considered a violation of the Planning Application approval and therefore subject to penalties described in the Ashland Municipal Code.
- e. Subdivision infrastructure improvements including but not limited to utility installations and common area improvements shall be completed according to approved plans prior to submittal of the final survey plat for review and signature.
- f. Electric services shall be installed underground to serve all lots, inspected and approved. The electric service plan shall be reviewed and approved by the Ashland Electric, Building, Planning and Engineering Divisions prior to installation.
- g. That the sanitary sewer laterals and water services including connection with meters at the street shall be installed to serve all lots, inspected and approved.



Planning Commission Approval

February 11, 2020

Date



**City of Ashland
Housing Program Funding request
FY2020-2021**

General Information		
Please indicate if this activity seeks to prevent, prepare for and respond to issues created by the COVID-19 Pandemic: Yes, this activity is to prevent, prepare, and respond to health and safety issue related to COVID 19.		
Agency Name: Maslow Project		
Agency Address: PO BOX 999		
City: Medford	State: OR	Zip: 97501
Application Contact Name: Mary Ferrell, Executive Director		
DUNS# 832252071		
Email Address: Mary@maslowproject.com	Phone Number: 541-621-7085	
Project Name: Maslow Project COVID Response to Vulnerable Populations		
Project Location: City of Ashland		

1. Project Eligibility		
<p>The CDBG-CV funds allocated under the CARES Act may be used for a range of eligible activities that prevent and respond to the spread of infectious diseases such as the coronavirus disease 2019 (COVID-19). The proposed activities must meet one of the three National Objectives as required by CDBG regulation:</p> <ul style="list-style-type: none"> • Benefit low-and moderate income persons • Aid in the prevention or elimination of slums or blight, and • Meet an urgent need 		
For Housing Trust Funds eligibility please refer to Section 3 of Resolution 2008-34		
Indicate Project Type(s) that agency is applying for with an X:		
Emergency Shelter Operations	<input checked="" type="checkbox"/>	Homeless Prevention
Emergency Shelter Case Management (essential services)	<input checked="" type="checkbox"/>	Case Management (non-shelter based) <input checked="" type="checkbox"/>

Rent/Utility Assistance	Other Public Service
Other	Please Explain:

2. Project Overview

Provide a short summary of the project and how the funding request will be used to support the project:
 Maslow Project is requesting \$30,000 in grant funding from the city of Ashland to provide emergency shelter for homeless youth and their families in Ashland during the COVID 19 pandemic and the natural wildfire disaster. Maslow Project would use the funding for motel and campground fees. This would keep the most vulnerable youth and families off the street to keeps kids and families safe. These funds would help us take care of the most at risk families first, pay for the families to stay in hotels during the pandemic. These foundational, low-barrier services are stabilizing and are preventive in nature to prevent further crisis from occurring.

Describe what **services** will be provided by the funds being requested (e.g. meals, case management, essential services, etc.). Include a description of the range of services: 1) Case Management & Advocacy 2) Navigation of community service agencies related to food, housing, health, employment, utility services and 3) Emergency Services: Crisis counseling, hotel and rental assistance, & food/essential supplies (hygiene & baby supplies) assistance.

Describe what **staffing** will be provided by the funds being requested:

- Staffing includes: 1 Supervisor, 1 Case Manager, and 1 Family Advocate

Total project budget: \$ 199,706 (Include Detailed Project Cost Form-Attached)

Total City of Ashland funding request: \$ 30,000

Source of City of Ashland Funding Requested (provide amount(s))

Affordable Housing Trust Funds	\$ <u>30,000</u>
Community Development Block Grants	\$ _____

Is the agency anticipating the submission of an application for EFSP - FEMA funds? Yes / **No**

If applying for FEMA funds please describe how the applicant intends to conduct COVID-19 Risk assessments for programs:

3. Program Design

a. What Population will this project target and primarily serve ? Youth and families experiencing homelessness	
Very Low Income X	Special Needs
Low income	Seniors X (Homeless families with vulnerable elderly)
Moderate income	Covid-19 High Risk X
Homeless X	Other (explain)
At Risk of Homelessness X	
b. Non-congregate shelter - If the project relates to providing emergency shelter specifically to reduce risk of COVID-19 transmission please provide the following:	
b.1. Leasing costs (if any)	\$500 deposit/ 3 rooms = \$1500
b.2 Number of hotel rooms to be secured (if any)	3 (Secured)-\$14,400 Emergency hotel shelters for COVID or Wildfire \$14,100
b.2.i Period of expected occupancy per hotel room (days)	180 days
b.2.ii Per night cost of Hotel Room (include taxes)	\$27 per room
b.2.iii Deep Cleaning Cost per room and cleaning interval	
b.3 Hotel(s) partnerships Is there a rental agreement for the number of rooms requested and the price per night for specific hotels? If so provide the hotel name, location, and number of rooms to be provided:	
b.3.i Hotel #1 (Written agreement in the process, verbal commitment made – 3 rooms) Carlise Inn Garden Suites 637 E Main Street	
b.3.ii Hotel #2 Emergency Hotel shelters for COVID or Wildfire	
b.3.iii Hotel #3	
b.4.iii Additional Comments:	
c. Meals Program - If the project relates to providing meals for homeless individuals please provide the following:	

c.1. Total Number of Meals provided	288 Meals
c.2. Period of expected Meal program - Start Date / End Date	Nov 1 to April 30
c.3. How will Meals be distributed	Delivery and "to-go" services at our center
c.4. Total cost per Meal provided (single meal cost)	\$3.50 per person / per meal
e. Other-Please Explain:	
6. Other Requirements	
a. Affirmatively Furthering Fair Housing:	
<p>If the project assists the homeless clients with placement in permanent affordable housing, discuss how your agency will assist the clients by expanding fair housing choice outside concentrated areas of poverty:</p> <p>Community-based collaborations are at the heart of our service delivery model, enabling us to provide effective, comprehensive wrap-around support to homeless youth & families. We coordinate with over 40 local community agencies/organizations forming a continuum of care that addresses the full range of needs of our clients. Long-standing partnerships ensure wrap-around supports, coordinated care and, multiple access points, eliminating duplication of services, expediting the provision of basic needs and referrals and increasing linkages for our clients.</p> <p>As an identifier of homeless youth/families in the region we also participate in Jackson Co. Continuum of Care and Homeless Task Force, and actively participating in local coordination entry efforts (VI SPDAT & TAYSPDAT screening, entering in to service point, etc.) to ensure effective referrals and successful outcomes, continuously improve inter-agency relationships, coordinating resources, and reducing duplication of services.</p> <p>We provide financial assistance for rental deposits, rent, rental diversion, & utility payments to help our clients become and remain stably housed.</p> <p>Case management offers a coordinated service approach to meet clients "where they are" to stabilize and engage to: 1) identify and coordinating resources in the community; 2) housing navigating and applications; 3) working with landlords on rent deposits and application fees; & 4) navigate housing obstacles/eviction diversion.</p>	
<p>Has your agency received training in Fair Housing in the last year? Yes / No</p> <p>If Yes, please list date(s) of training and provider of training: Basics of the Fair Housing Act- HUD's Youtube Channel, every fall, last training, August 2020. Ongoing partnership and training with the Housing Authority of Jackson County.</p>	

DETAILED PROJECT COST FORM:

Project Name: Maslow Project COVID Response to Vulnerable Populations	
Agency Name and Address: Maslow Project PO BOX 999 Medford, OR. 97501	Contact Person: Mary Ferrell
	Contact Phone Number: 541-621-7085
	Contact Email: Mary@maslowproject.com

Positions Salary Expenses related to the funding request:	Total Annual Program Costs*	Support from Other Funding Sources	REQUESTED FUNDING from City of Ashland	Agency Contribution (" Match")
Director				
Supervisors	\$51,000		\$0	
Case Managers Navigation Services	\$40,000		\$0	
Monitors				
Administrative Staff				
Family Advocate	\$35,000		\$0	
Employee Benefits:				
FICA at 7.65%	\$9,639			
Other Fringe Benefits	\$16,821			
		Private Foundations: \$50,000, Federal and State Grants:\$60,000 & School District Contracts: \$30,000, & Individual Donations: <u>\$12,460</u>		
	\$152,460	\$152,460		
Agency Expenses related to the funding request:				
Rent				
Utilities				

Insurance				
Program Supplies	\$1,000 Providing kitchenette supplies, sheets, etc.			\$1,000
Food	\$1,000 for families in Emergency shelter			\$1,000
Office Supplies/Equipment				
Security				
Repair & Maintenance				
Homeless Prevention Assistance	(\$1,500 deposit + \$14,400 for secured hotel) (emergency hotel stays-\$14,100) = \$30,000		\$30,000	
* Authorized by federal government to DeMinus of 10% Indirect Cost rate for Overhead which includes insurance, supplies, etc.	\$15,246			\$15,246
Totals:	\$199,706	\$152,460	\$30,000	\$17,246

To the best of my knowledge and belief, data in the proposal are true and correct, submission of the proposal has been duly authorized by the governing body, and the governing body has agreed to execute required certifications, statements of assurances and contracts if selected by City of Ashland to do so.



Signature CEO/Chairperson/President/

09/14/2020

Date



Coastal Housing Center
93781 Newport Ln.
Coos Bay, OR 97420
Phone: 541-756-1000

Main Office
605 SE Kane St.
Roseburg, OR 97470
Phone: 541-673-4909

1. Introduction

Umpqua Community Development Corporation dba NeighborWorks Umpqua (NWU) is a non-profit community development corporation that serves Southern Oregon, with an emphasis on Coos, Curry, Douglas, Jackson, and Josephine Counties. NWU was founded in 1991 and is a rural-focused housing and community development corporation committed to promoting opportunity for all. We do this by providing quality housing, community development, property management, financial services, education, and advocacy in order to attain economic, social and environmental sustainability, and equity. We are members of the NeighborWorks America and Rural LISC networks, allowing us access to industry expertise, peer sharing, and national funding sources. NWU is a certified Community Housing Development Organization (CHDO) for the State of Oregon’s HOME program demonstrating our dedication to our mission, our board oversight, and economic justice for all.

As a regional community development organization, NWU is unique in Southern Oregon. Using housing that is affordable as a platform, we engage in comprehensive community development. We work to build assets and financial opportunity for individuals, facilitate community based economic development, and expand housing options, for both rental and for ownership. The way our programs are designed and delivered shifts across the five-county service district, as we strive to meet the diverse needs of each community. NWU engages with individuals and communities in the region to improve the quality of life for residents and ensure that Southern Oregon has opportunities for everyone to thrive.

In 2016, NWU adopted a new Strategic Plan to guide our efforts into the 2020s. The plan emphasized growth and expansion and taking on a deeper and more meaningful role in the region. In addition to unit production goals, NWU is focused on developing new partnerships and methodologies to have a more meaningful impact.

This application to the City of Ashland Affordable Housing Trust Fund (AHTF) is a result of those efforts. We propose to use AHTF support to strengthen the organization’s capacity to manage and support Community Land Trust (CLT) style homes and expand the CLT in Ashland to allow more people to have access to homeownership that is permanently affordable.





Coastal Housing Center
93781 Newport Ln.
Coos Bay, OR 97420
Phone: 541-756-1000

Main Office
605 SE Kane St.
Roseburg, OR 97470
Phone: 541-673-4909

2. Project Description

CLT ownership has become an increasingly common way for communities to address the shortage of affordable housing. CLT units are permanently affordable; while the homeowner owns the unit, and land underneath is held and stewarded by a mission-oriented entity. This entity stewards the land and ensure ongoing affordability and program management.

Given the high costs of homes in Ashland, the CLT model is well suited for the community. NWU proposes a three-part project to strengthening our capacity to steward CLT units in Ashland, modernize existing CLT stewardship systems, and expand the CLT model to provide additional affordable housing.

This project will help improve the long-term viability of 36 existing CLT units in Ashland, providing housing to 36 low-moderate income families, and plan for the development of up to an additional 30 CLT units starting in 2021. These new units would be targeted for families earning less than 120% of Area Median Income (AMI), with at least half of those targeted at families making less than 80% of the AMI. 66 permanently affordable CLT units in Ashland will be supported via this effort.

NWU currently stewards 30 CLT units in Ashland at the Rice Park, Siskiyou, and Terrace communities. These communities provide affordable homeownership options for low-moderate income people who are looking to live in Ashland but are priced out of the market. NWU became the steward of these units in 2013 when Rogue Valley CDC decided to cease operations. Since their initial creation and transfer, the CLT sector has continually improved and refined the organizational structure and systems needed to sustainably steward CLT communities. Via our membership in the Grounded Solutions Network and Northwest Community Land Trust Coalition, we have a better understanding of current best practices, and seek to employ that knowledge for the CLTs in Ashland.

The first part of our project is the modernization of these existing CLT communities' organizational structure. In the community meetings we held with each community in late 2019 and early 2020, we heard clearly that residents are willing to have additional rules and governance in order to better organize themselves and manage their communities. While each community is different, in general this modernization would consist of a conversion to transfer of the current land leases to the Grounded Solutions Model Land Lease, and an assessment and plan to create a formal resident lead group at each community, like a Homeowners Association. NWU seeks AHTF backing to support our efforts working with the communities to plan and implement





Coastal Housing Center
93781 Newport Ln.
Coos Bay, OR 97420
Phone: 541-756-1000

Main Office
605 SE Kane St.
Roseburg, OR 97470
Phone: 541-673-4909

these transitions. We would seek out professional technical assistance to help NWU with the technical and planning elements to ensure strength and success; AHTF monies would allow NWU to access high quality technical assistance or consulting services. Transitioning to a new lease and establishing an HOA will require some attorney fees as well, to ensure the transfer adhere to all applicable laws.

The second part of the project in late 2019, NWU was approached by ACCESS to see if NWU would be interested in becoming the steward of the 6 CLT homes they have in Ashland, which they inherited from the Ashland Community Land Trust. NWU and ACCESS agreed in principle that CLT stewardship is a better fit with NWU, and given our existing presence in Ashland, it made sense to pursue. The barrier to moving forward has been lack of resources for due diligence or other transfer expenses. Like the CLT units NWU currently stewards, we would transfer these units to a new land lease; as the 6 ACCESS units are scattered site, it is not anticipated that a HOA will be formed. Expanding the NWU CLT portfolio would improve our ability to sustainably steward CLT units in Ashland.

The third part of the project includes the planning and pre-development activities to develop a new CLT project in Ashland. This project would be up to 30 CLT units. NWU’s goal will be to develop a project that will be ready for the Oregon Housing and Community Services Local Innovation Fast Track (LIFT) Homeownership application cycle in early 2021. NWU has identified several parcels that may be viable options. This project may be single site, scattered sites, or a mix, depending on available land. The AHFT would support NWU dedicating staff time to this project. NWU would fund the direct pre-development expenses from our revolving loan fund from Oregon Community Foundation’s Oregon Impact Fund. Assuming a LIFT award in 2021, construction could begin by late 2021. These units would largely be targeted to families making 80% or less of the AMI. This project will help meet a need called for in the Ashland Housing Needs Analysis for homeownership units for families making below \$75,000 per year. These units would be priced in the \$240,000-\$280,000 range. NWU emphasizes efficient land use and density, preservation of natural environments and energy efficient design and construction in all our developments.

This project would begin in July of 2020, or once the AHTF award is made. Parts One and Two can begin immediately after an award and would be complete by the end of 2020. These parts will be led by NWU’s Asset Manager, Lynn Williams. Part 3 will likewise begin in July 2020 and will culminate in early 2021 with an application to the LIFT for Homeownership Program. This part will be led by NWU’s Director or Acquisitions and Development, Brian Shelton-Kelley. NWU is a host organization for the California Coalition for Rural Housing’s Internship Program, a program that seeks





Coastal Housing Center
93781 Newport Ln.
Coos Bay, OR 97420
Phone: 541-756-1000

Main Office
605 SE Kane St.
Roseburg, OR 97470
Phone: 541-673-4909

to place recent college graduates with diverse backgrounds into affordable housing and community development with rural housing organizations to increase the diversity in rural community development. Our 2020 intern via this program will assist on all the project parts.

This project will serve several existing locations in Ashland.

Rice Park: 15 homes at the intersection of Alameda Drive and Perozzi Street.
Siskiyou: 9 homes located at the intersection of Siskiyou Boulevard and Faith Avenue
Terrace: 6 homes located on Siskiyou Boulevard off of Park Street.

ACCESS Portfolio: 3 townhomes located at 114, 120, and 126 Crocker Street.
1 single family home located at 311 Hersey Street.
1 duplex with two units located at 37 and 39 Garfield Street.

The new project location is to be determined. NWU has looked at site on Nevada Street and Clay Street. The goal will be to have a site or site under site control, typically with an option to purchase, by the end of 2020.

3. Project Experience

NWU has nearly 30 years of experience with affordable housing development, production, and management. We have developed or acquired over 600 units of rental housing, built or rehabbed more than 100 single family homes, and have assisted thousands of existing or prospective homeowners to buy and or retain their home through counseling, education, lending, foreclosure prevention, and home repair services. NWU senior staff have 90 years combined experience in affordable housing issues. Our equity work is a strong driver towards creating new and innovative ways of developing new housing design systems.

NWU has a staff of approximately 60 full time employees, and an annual operating budget of \$5 million. Our diverse Board of Directors provides leadership, strategic oversight, and governance. As a CHDO, 1/3rd of our Board members represent low-income communities. We have Board members representing the many geographies and communities of our service area, including Jackson County.

NWU is well linked to the CLT community of practice. We are members in the Grounded Solutions Network and Northwest Community Land Trust Coalition. We will be hosting the NWCLTC annual gathering in Ashland in May of 2020. We have solid





Coastal Housing Center
93781 Newport Ln.
Coos Bay, OR 97420
Phone: 541-756-1000

Main Office
605 SE Kane St.
Roseburg, OR 97470
Phone: 541-673-4909

relationships with CLT leaders like Proud Ground in Portland and Champlain Housing Trust in Vermont.

NWU currently has over 200 units in active development, and more in the development pipeline. Highlights include, Deer Creek Village, a 68-unit affordable rental project under construction in Roseburg (\$17.5 million total development cost), a 5-unit Mutual Self Help build in Myrtle Creek, and a 20 home Mutual Self Help build planned for Winston. In 2019, NWU was awarded a multiyear capacity building grant from Meyer Memorial Trust to support our efforts to jumpstart housing development on the South Coast.

Expanding our housing development activities to Ashland using the CLT model is a natural progression for NWU, and we can use our organizational experience to ensure a successful project.

In addition to NWU, the other partners involved in the project will be ACCESS, Inc. and the residents of the CLTs. Resident engagement and involvement will be critical for a successful outcome and NWU will devote the time needed to meaningfully engage with residents.

4. Funding Request

The total project cost is \$96,500. NWU is requesting \$43,500 from the AHTF to support this project. This will be matched by \$53,000 of applicant cash (\$50,000) or in-kind (\$3,000) services. The AHTF request is 48% of the project budget. A detailed budget is included. As existing CLTs have limited ability to pay back loans or other forms of investments with repayment terms, local grant sources like the AHTF are crucial resources to support this type of capacity building project. Supporting our pre-development work for a new project will help leverage millions of development capital for affordable housing production in Ashland via the new CLT project.



Project Item	<u>Proposed Budget</u>	<u>Ashland AHFT</u>	<u>Match</u>	<u>Match Source</u>
CLT Management Strengthening				
Capacity Building/Project Management	\$ 7,500.00	\$ 7,500.00	\$ -	
NWU Community Land Trust Modernization				
Technical Assistance / Consulting	\$ 10,000.00	\$ 10,000.00	\$ -	
Legal/Professional Fees	\$ 5,000.00	\$ 5,000.00	\$ -	
Access CLT Integration				
Due Diligence and Transfer Expenses	\$ 10,000.00	\$ 10,000.00	\$ -	
Legal/Professional Fees	\$ 3,500.00	\$ 3,500.00	\$ -	
Set Up and Integration	\$ 3,000.00	0	\$ 3,000.00	<i>NWU In-kind (SalesForce Set up and Programming)</i>
Total CLT Management Capacity Building	\$ 39,000.00	\$ 36,000.00	\$ 3,000.00	
CLT Expansion and Development				
New CLT Pre Development				
Capacity Building / Project Management	\$ 7,500.00	\$ 7,500.00	\$ -	
Pre Development Activities				
Site Control Expenses (Option/Earnest Money)	\$ 10,000.00	\$ -	\$ 10,000.00	
Environmental Assessment	\$ 5,000.00	\$ -	\$ 5,000.00	
Wetlands Assessment/Mapping	\$ 5,000.00	\$ -	\$ 5,000.00	
Site Planning/Civil Engineering	\$ 15,000.00	\$ -	\$ 15,000.00	
Land Use Approvals / Entitlements	\$ 10,000.00	\$ -	\$ 10,000.00	
Legal	\$ 5,000.00	\$ -	\$ 5,000.00	
Pre Development Activities Total	\$ 50,000.00	\$ -	\$ 50,000.00	<i>NWU Oregon Impact Fund Revolving Loan Fund</i>
Total CLT Expansion and Development	\$ 57,500.00	\$ 7,500.00	\$ 50,000.00	
Total	\$ 96,500.00	\$ 43,500.00	\$ 53,000.00	

Options for Helping Residents of Ashland
Proposal to Ashland Affordable Housing Trust Fund
September 4, 2020
OHRA Winter Shelter

This proposal to the Affordable Housing Trust Fund is for funds to operate the OHRA Winter Shelter safely and in compliance with all requirements and precautions dictated by COVID-19. The pandemic requires us to move the shelter to a larger facility where we can assure social distancing including proper spacing and barriers between beds. Precautions also include cleaning every other day and providing staff and guests with personal protective equipment. A concern for safety has also led us to discontinue our volunteer program and to hire paid Overnight Hosts. Funds requested in this proposal will help us ensure that our program meets all shelter COVID-19 safety requirements and precautions.

Options for Helping Residents of Ashland (OHRA) will manage the OHRA Winter Shelter (OWS) which will house up to 40 individuals per night from November 1, 2020 to March 31, 2021. Guests will be selected based on a combination of their vulnerability to COVID-19 using CDC criteria and their overall vulnerability based on the Service Prioritization Decision Assistance Tool (SPDAT). Once a person has been accepted they will have a bed guaranteed for the rest of the shelter season unless they voluntarily leave or are excluded for cause. Breakfast and dinner will be provided in prepackaged meals to be prepared by external volunteer groups.

The shelter site will be the Calvin Hall of the Ashland First Presbyterian Church, 1601 Siskiyou Boulevard. Calvin Hall is approximately 7,700 sq. ft. with approximately 7,000 sq. ft. of usable square footage. The building has four restrooms, a commercial kitchen, large open areas and 5 classrooms of approximately 250 sq. ft. each. The facility will be rented in the months of October and April to allow for set up, break down and cleaning. The proposed rent has been negotiated at a rate less than the estimated commercial rate (per attached Letter of Opinion).

The hall will be arranged with beds spaced six feet apart and separated by temporary barriers. CDC guidelines will be followed in all operations to ensure minimum risk of COVID-19 transmission. The facility will be open from 6:00 pm to 9:00 am each night.

Because COVID-19 prevents us from using volunteers, the shelter will be staffed by two paid overnight hosts and a fire watch monitor. In addition, a Resource Navigator will meet with guests in the evening and morning to help them access resources needed to stabilize their lives. The facility will be cleaned by a commercial cleaning service every other day and deep cleaned at the end of shelter season.

In addition to operating the OHRA Winter Shelter, OHRA will provide emergency motel rooms to guests who have been exposed to COVID-19 but have not been diagnosed with the disease or to guests who have another medical reason to be isolated. These guests will be housed for as long as is medically necessary.

The Affordable Housing Trust Fund will fund COVID-19 related expenses including the overnight hosts, rent, utilities, set-up and breakdown costs, personal protective equipment and boxes for individual meals. All other operational costs will be covered through a contract with ACCESS.

Budget OHRA Affordable Housing Trust Fund Proposal	
Salaries	
2.8 FTE Overnight Hosts @ \$15.93/hr. x 5 months	\$37,346
SUBTOTAL	\$37,346
Employee Benefits:	
FICA at 7.65%	\$2,857
Other Fringe Benefits	\$878
SUBTOTAL	\$3,735
Operating Costs	
Rent (Winter Shelter)	\$42,000
Rent (Motel Rooms)	\$45,300
Utilities	\$3,745
Program Supplies	\$7,716
Repair & Maintenance (shelter)	\$25,000
Repair & Maintenance (motel rooms)	\$5,000
SUBTOTAL	\$128,761
Total Salaries, Benefits and Expenses	\$169,842
Overhead @ 12%	\$20,381
TOTAL BUDGET	\$190,223

BUDGET NARRATIVE 1

Rent Winter Shelter): Rent for Calvin Hall, 7 months @ \$6,000/month (negotiated rate).

Rent (Motel Rooms): Rent for motel rooms, average 5 rooms per night for 151 days at \$60/night.

Utilities: Electricity, gas, water and garbage for Calvin Hall (per estimate by church).

Program Supplies: Cleaning supplies, personnel protective equipment and boxes for prepackaged meals to be supplied by volunteers (2 boxes/guest/day x 40 guests x 151 days x \$0.20 each (per research on retail costs)).

Repair and Maintenance (Shelter): Set up costs and cost of regular cleaning of Calvin Hall to CDC standards by a commercial cleaner.

Repair and Maintenance (Motel Rooms): Cost of deep cleaning as required by motel management.



**City of Ashland
Housing Program Funding request
FY2020-2021**

General Information		
Please indicate if this activity seeks to prevent, prepare for and respond to issues created by the COVID-19 Pandemic:		
Agency Name: Options for Homeless Residents of Ashland dba Options for Helping Residents of Ashland.		
Agency Address: PO Box 1133		
City: Ashland	State: OR	Zip: 97520
Application Contact Name: Michelle Arellano, Executive Director		
DUNS# 067939147		
Email Address: executivedirector@helpingashland.org	Phone Number: 541-625-4055	
Project Name: OHRA Winter Shelter		
Project Location: 1601 Siskiyou Boulevard, Ashland, OR 97520		

1. Project Eligibility		
The CDBG-CV funds allocated under the CARES Act may be used for a range of eligible activities that prevent and respond to the spread of infectious diseases such as the coronavirus disease 2019 (COVID-19). The proposed activities must meet one of the three National Objectives as required by CDBG regulation:		
<ul style="list-style-type: none"> Benefit low-and moderate income persons Aid in the prevention or elimination of slums or blight, and Meet an urgent need 		
For Housing Trust Funds eligibility please refer to Section 3 of Resolution 2008-34		
Indicate Project Type(s) that agency is applying for with an X:		
Emergency Shelter Operations	<input checked="" type="checkbox"/>	Homeless Prevention
Emergency Shelter Case Management (essential services)	<input checked="" type="checkbox"/>	Case Management (non-shelter based)
Rent/Utility Assistance	<input type="checkbox"/>	Other Public Service
Other	<input type="checkbox"/>	Please Explain:

2. Project Overview

Provide a short summary of the project and how the funding request will be used to support the project:

Options for Helping Residents of Ashland (OHRA) will manage the OHRA Winter Shelter (OWS) which will house up to 40 individuals per night from November 1, 2020 to March 31, 2021 in a manner that complies with all precautions and requirements necessary to minimize the risk of COVID-19 transmission. Motel rooms will be provided to guests who need to self-quarantine because of COVID-19 exposure or illness such as the flu.

Describe what **services** will be provided by the funds being requested (e.g. meals, case management, essential services, etc.). Include a description of the range of services:

Overnight winter housing in a safe environment that minimizes risk of COVID-19 transmission. Case management and meals will be provided through other funding sources or volunteer activity.

Describe what **staffing** will be provided by the funds being requested:

Two (2) overnight hosts seven nights per week (2.8 FTE).

Total project budget: **\$398,951** (Include Detailed Project Cost Form-Attached)

Total City of Ashland funding request: **\$190,223**

Source of City of Ashland Funding Requested (provide amount(s))

Affordable Housing Trust Funds **\$190,223**

Community Development Block Grants **\$0**

Is the agency anticipating the submission of an application for EFSP - FEMA funds? Yes / **No**

If applying for FEMA funds please describe how the applicant intends to conduct COVID-19 Risk assessments for programs:

3. Program Design	
a. What Population will this project target and primarily serve ?	
Very Low Income	Special Needs
Low income	Seniors
Moderate income	Covid-19 High Risk
Homeless XX	Other (explain)
At Risk of Homelessness	
b. Non-congregate shelter - If the project relates to providing emergency shelter specifically to reduce risk of COVID-19 transmission please provide the following:	
b.1. Leasing costs (if any)	See narrative below
b.2 Number of hotel rooms to be secured (if any)	
b.2.i Period of expected occupancy per hotel room (days)	
b.2.ii Per night cost of Hotel Room (include taxes)	
b.2.iii Deep Cleaning Cost per room and cleaning interval	
<p>OHRA will rent motel rooms to house guests who either have been exposed to COVID-19 but have not tested positive or those who exhibit signs of illness such as flu and need to be quarantined. Shelter guests who test positive for COVID-19 will be transferred to a county program for their care.</p> <p>The length of stay will vary depending on the severity of the person’s illness or the outcome of subsequent COVID-19 tests in the case of a person who have been exposed.</p> <p>We are projecting an average of five rooms per night at a cost of \$60/night and a cost of \$5,000 for cleaning of rooms at the end of each stay.</p>	
b.3 Hotel(s) partnerships Is there a rental agreement for the number of rooms requested and the price per night for specific hotels? If so provide the hotel name, location, and number of rooms to be provided:	
b.3.i Hotel #1 NOT APPLICABLE	
b.3.ii Hotel #2	
b.3.iii Hotel #3	

b.4.iiii Additional Comments:	
c. Meals Program - If the project relates to providing meals for homeless individuals please provide the following:	
c.1. Total Number of Meals provided	
c.2. Period of expected Meal program - Start Date / End Date	
c.3. How will Meals be distributed	
c.4. Total cost per Meal provided (single meal cost)	
e. Other-Please Explain: All meals will be prepared and donated by community volunteer groups. OHRA's only cost will be the individual disposable boxes for the meals.	
6. Other Requirements	
a. Affirmatively Furthering Fair Housing:	
If the project assists the homeless clients with placement in permanent affordable housing, discuss how your agency will assist the clients by expanding fair housing choice outside concentrated areas of poverty: Resource Navigators assist guests in finding permanent housing through application for HUD vouchers, Section 8 or other benefits programs. In cases where guests have income we help them find accommodations through the commercial market.	
Has your agency received training in Fair Housing in the last year? Yes / No If Yes, please list date(s) of training and provider of training: Senior Director of Program Services attended training in 2019.	

DETAILED PROJECT COST FORM:

Project Name: OHRA Winter Shelter				
Agency Name and Address: Options for Homeless Residents of Ashland dba Options for Helping Residents of Ashland PO Box 1133 Ashland, OR 97520		Contact Person: Michelle Arellano		
		Contact Phone Number: 541-625-4055		
		Contact Email: <u>executivedirector@helpingashland.org</u>		
	Total Annual Program Costs*	Support from Other Funding Sources	<u>REQUESTED FUNDING</u> from City of Ashland	Agency Contribution (“ Match”)
Salaries			-	
Director	\$26,880	\$26,880	\$0	\$26,880
Supervisors	\$37,500	\$37,500	\$0	\$37,500
Case Managers	\$64,460	\$64,460	\$0	\$64,460
Monitors	\$37,346	\$0	\$37,346	\$0
Administrative Staff	\$11,000	\$11,000	\$0	\$11,000
SUBTOTAL	\$177,186	\$139,840	\$37,346	\$139,840
Employee Benefits:				
FICA at 7.65%	\$13,555	\$10,698	\$2,857	\$10,698
Other Fringe Benefits	\$11,664	\$10,786	\$878	\$10,786
SUBTOTAL	\$25,219	\$21,484	\$3,735	\$21,484
Agency Expenses related to the funding request:				
Rent (Winter Shelter)	\$42,000	\$0	\$42,000	\$0
Rent (Motel Rooms)	\$45,300	\$0	\$45,300	\$0
Utilities	\$3,745	\$0	\$3,745	\$0
Insurance	\$1,500	\$1,500		\$1,500
Program Supplies	\$7,716	\$0	\$7,716	\$0
Office Supplies/Equipment	\$3,000	\$3,000		\$3,000
Security	\$20,540	\$20,540		\$20,540
Repair & Maintenance (Shelter)	\$25,000	\$0	\$25,000	\$0
Repair & Maintenance (Motel Rooms)	\$5,000	\$0	\$5,000	\$0
Homeless Prevention Assistance	\$0	\$0		\$0
SUBTOTAL	\$153,801	\$25,040	\$128,761	\$25,040
Total Salaries, Benefits and Expenses	\$356,206	\$186,364	\$169,842	\$186,364
Overhead @ 12%	\$42,745	\$22,364	\$20,381	\$22,364
TOTAL BUDGET	\$398,951	\$208,728	\$190,223	\$208,728

To the best of my knowledge and belief, data in the proposal are true and correct, submission of the proposal has been duly authorized by the governing body, and the governing body has agreed to execute required certifications, statements of assurances and contracts if selected by City of Ashland to do so.



Signature CEO/Chairperson/President

September 8, 2020
Date

Memo

DATE: 9/24/2020

TO: Ashland Housing and Human Services Commission

FROM: Brandon Goldman, Senior Planner
Linda Reid, Housing Program Specialist

RE: Affordable Housing Standards Land Use Ordinance Amendments

Beginning in 2018, Planning staff began the process of evaluating the affordable housing program. The primary goals of the evaluation were to improve administrative efficiency of the affordable housing program for the many entities involved in Ashland's Affordable Housing Program. These entities include homeowners, homebuyers, members of the development community and real-estate professionals. The changes proposed address specific concerns raised over the last several years from the wide range of entities involved in the affordable housing process. The changes proposed have the overarching goal of balancing long-term affordability while allowing a reasonable rate of return for homeowners and developers. Several revisions aim to increase the effectiveness and efficiency of the program's administration, and several changes are proposed to address regulatory barriers or to help simplify existing processes. All of the proposed changes should help to make the program more readily understood by affordable housing and private market developers, as well as to increase the coordination between affordable and private market developers. Additionally, should the changes be adopted, the future transfer of homes to participating ownership households will be easier while providing a more predictable return on investment.

As part of the process, staff undertook a review of housing affordability program best practices and evaluated a range of options. The Planning Commission held a study session to review the identified issues on [March 10, 2020](#), the Housing and Human Services Commission held a meeting on [July 23, 2020](#) and the City Council held a Study Session on [July 20, 2020](#).

Through the Housing Program and Affordable Housing Standards evaluation process staff identified a number of changes being considered for resolution 2006-13. As the Affordable Housing Program resolution also references land use code requirements, once the land use standards are finalized it will be necessary to amend the resolution for consistency. Amendments to Resolution 2006-13 will be prepared and presented to the City Council after adoption of the land use amendments currently proposed. Lastly, staff is taking this opportunity to address inconsistencies in the land use ordinance and to explore additional changes based on feedback from affordable housing and market rate developers regarding barriers to development of affordable housing.



Staff presented the potential revisions to the Planning Commission, the Housing Commission and the City Council (at the meeting dates listed above) as well as to group of private market and affordable housing developers, and real-estate professionals at two stakeholder meetings held on August 11th and August 14th to gain feedback. The input provided at these stakeholder meetings is summarized in a separate memo entitled “Affordable Housing Standards – Stakeholder meeting “.

Based on the feedback from the elected and appointed officials and from the development and real-estate communities, staff made additional changes to the those which were originally presented.

The changes outlined below will provide a means of simplifying the affordable housing program to be more readily understood by affordable housing developers and owners of affordable housing units. The following provides a summary of potential revisions to the Affordable Housing Standards within Ashland’s Land Use Ordinance that should be considered in order to address changes in market conditions, correct inconsistencies in the land use code, facilitate coordination between market rate developers and affordable housing providers, and implement housing program adjustments to better enable low- and moderate-income families to afford quality housing.

Summary of Potential Revisions:

- Change the method by which the maximum sale price is calculated for ownership units within the Affordable Housing Program. Staff is suggesting a fixed rate formula calculation for establishing the maximum resale price that increases at a rate of 1.5% annually. The current variable calculation method which incorporates lending interest rates, taxes, and homeowner association (HOA) dues would still be utilized to calculate the initial sale price when an affordable unit first enters the program. Thereafter the 1.5% annual increase in the maximum purchase price would provide for a more predictable resale price for homeowners within the affordable housing program. Further this new method of calculating resale price would ensure homeowners are not faced with a stagnant home value due to increasing HOA dues or increasing interest rates. The City of Ashland has an agreement in place with the Jackson County Assessor’s office which ensures that the increase in assessed value of units deed restricted through the City’s affordable housing program will be based on the maximum sales price of a given unit as determined by the City’s affordable housing formula. This assures that the assessed value for the purpose of determining the annual tax rate is commensurate with the formula’s rate of increase.
 - Establishing a fixed rate method of valuation increase for the purposes of establishing the allowable resale price will allow homeowners to calculate their future return on investment in a predicable manner. Currently determining the resale price of a covered unit employs the use of a complex formula which considers current interest rates, median incomes by household size, changes in HOA dues, and ultimately requires consultation with City Housing Program Staff to derive the resulting maximum purchase price on an annual basis. A fixed-rate formula increase eliminates such complexity and will thus increase the efficiency of the City Housing Program Specialist’s administration of the program.



- Amend the provisions of the Ashland Land Use Ordinance relating to the monthly rental amounts used in the affordable housing program (18.2.5.050.B.1). Instead of utilizing the existing table outlining rental charges for affordable rental housing (Table 18.2.5.050.B) feedback from stakeholders suggest referencing the maximum rents established by U.S. Department of Housing and Urban Development (HUD) for the HOME program for the corresponding bedroom size and for Low Income Housing Tax Credit (LIHTC) program for the corresponding bedroom size for those units financed with that funding source. As These rents are adjusted annually by HUD based on the median incomes in the Medford-Ashland Metropolitan Service area.
 - Correlating Ashland’s maximum rental amounts with the HUD Low-rent and High-rent limits and the LIHTC programs for our area will allow our program to better align with affordable housing proposals that utilize state or federal funding for their projects. As many affordable housing providers are already subject to the HUD established HOME and LIHTC program rent limits due to their sources of funding, making our program consistent with those rental rates will simplify the application processes for affordable housing providers seeking State grant funding. Further, as the State of Oregon maintains and adjusts these program limits each year, the City of Ashland will no longer be responsible to annually calculate and maintain a unique maximum rental amount table for use only for covered units within the City of Ashland.

- Amend the provisions within the Ashland Land Use Ordinance relating to the base density calculation used for determining the number of required affordable housing (18.5.8.050.G.1). Amending this section would clarify that the base density of the property shall be calculated using the area to be developed, excluding any portions of the property containing undevelopable areas such as wetlands, floodplain corridor lands, slopes greater than 35 percent, or land dedicated as a public park.
 - Presently the affordable housing requirements are based on the entire lot size, indiscriminate of any reductions of buildable area due to natural areas to be preserved. The way this standard is presently written differs from other Land Use provisions which otherwise allow the density of a development to be reduced in consideration of the unbuildable natural areas to be preserved. Not providing for a corresponding reduction in the density of affordable housing required can have the unintended consequence of effectively increasing the proportion of required affordable housing as a proportion of the housing units actually developed. This discrepancy can result in a scenario where the number of affordable housing units required for an annexation or zone change could exceed the number of market rate units that could otherwise be developed, thereby making a residential housing project no longer financially viable without substantial governmental subsidy.

- Amend the provisions within the Ashland Land Use Ordinance establishing equivalence values for affordable housing to newly allow rental to households earning 80% Area Median Income (AMI) to qualify as 1.25 units for the purposes of calculating the affordable housing unit requirement (18.5.8.050.G.1.c).



- Rental units affordable to households earning 80% AMI or less are not currently being provided by the market at the rates needed, allowing such to qualify as part of an annexation/zone change request could incentivize the creation of more rental units. Presently the market rents in Ashland exceed what households earning 80% AMI can afford without being cost burdened. Amending this standard for annexations and zone changes would help address this disparity and allow developers to provide units benefiting households earning up to 80% AMI while providing rental units that satisfy the affordable housing requirements.
- Remove the provisions within the Ashland Land Use Ordinance that allow newly constructed affordable homeownership and rental units to be targeted to households earning 60% AMI (18.5.8.050.G.1.d) for required affordable housing in annexation, zone changes, and condo-conversions.
 - Removing the 60% AMI target for ownership households, and instead focusing on households earning 80% AMI, 100% AMI, or 120% AMI, is necessary in Staff’s assessment as there are no longer lending packages for the 60% AMI income bracket and units are therefore difficult to finance at change of ownership. Affordable housing providers (e.g. Habitat for Humanity) have indicated that households earning 60% AMI and below often do not qualify for loans (both subsidized and conventional) and thus such units can be difficult to develop or resale once completed. Raising the qualifying incomes to 80% AMI or below for the lowest income bracket would not preclude a household earning 60% AMI from purchasing a qualified ownership unit, but it would enable households earning up to 80% AMI to qualify.
 - Allowing for rental units targeted to households earning 80% AMI will help ensure rentals developed by the private market are financially viable. Due to the existing availability of the 60% AMI rental option, private developers select the 60% rental option simply to provide fewer affordable units, however the difficulty of developing and administering affordable units at this income level is often not fully considered. Non-Profit affordable housing providers (e.g. Housing Authority of Jackson County) will still be able to develop rental units reserved for households earning 60% AMI as such units will still qualify as meeting the “less than the 80% AMI” target.
- Amend the affordable housing household “occupancy basis” as described Table 18.2.5.050.C of the Land Use Ordinance. Potential changes include removing the 4-bedroom /7-person option; revising the 3-bedroom unit occupancy basis from 6 to 5 persons; and revising the 2-bedroom unit occupancy basis from 4 to 2 persons. Households with a greater or lesser number of occupants shall remain eligible for covered units but the sale price shall not be adjusted based on the median incomes of the larger household sizes.

Table 18.2.5.050.C. Occupancy Basis for Affordable Rental Housing

Unit Type		Occupancy
Studio	=	1 person household income for the designated income level
1 Bedroom	=	2 person household income for the designated income level



Unit Type		Occupancy
2 Bedroom	=	4-person <u>3-person</u> household income for the designated income level
3 Bedroom	=	6-person <u>5-person</u> household income for the designated income level
4 Bedroom	=	7-person household income for the designated income level

- Given Ashland’s average persons per household number (2.0 persons per household), the larger household sizes indicated in the table are not typically realized in covered affordable units. As the maximum sale price of a unit is based on household incomes, these large household sizes setting the occupancy basis within the existing table have the unintended effect of increasing the purchase price beyond the means of the more typical, smaller, household sizes.
- Amend the provisions within the Ashland Land Use Ordinance that establish the timing of the development of affordable units (18.2.5.050.G.4) to clarify that dedication of land through transfer of title to a non-profit affordable housing provider will satisfy these requirements and there would be no further timing obligation for the market rate units. There has been concern raised by private developers that they have no control over the timing of the development of affordable units after the property is transferred to an affordable housing partner.
- The Planning Commission also expressed concerns about the timing of the development of the affordable housing component of the overall development as well as ensuring that the units would be built as affordable. To address this concern language was added to stipulate that the transfer of title to an affordable housing provider would have to be completed prior to receiving a certificate of occupancy for the first 25% of the market rate units. This would facilitate the transfer of title soon after infrastructure is in place to enable the lands development by the affordable housing provider.
- Remove the provision within the Ashland Land Use Ordinance that requires affordable units be distributed throughout the project (18.2.5.050.G.5).
 - The City has approved numerous exceptions to this standard in finding that the efficient development of affordable housing often necessitates clustering the units together. Further, given the small scale of developments within Ashland, the concern intended to be addressed by this standard, that affordable units would be segregated and stigmatized within an area, has not been evident in recent developments.
 - Removing this requirement would provide developers more flexibility regarding the location of affordable housing units within a project. This is often requested as a condition of partnering with non-profit housing developers to complete the affordable housing units. Affordable housing providers can benefit from consolidating their affordable housing units into a contiguous area as it provides for efficiency in the initial building process, and further simplifies management of the affordable units over time.
 - Both private and affordable housing developers were in favor of this change. And while there were concerns raised regarding social justice issues and issues of stigmatism at the



Housing and Human Services Commission as well as at the stakeholder meeting. The evaluation and changes currently being proposed are in response to barrier removal issues that have been identified over the past several years. The uncertainty of the development process when asking for exceptions to approval criteria has been brought up as a barrier to the development of affordable housing. Consequently, staff is recommending the removal of this requirement.

- Amend the provisions of the Ashland Land Use Ordinance relating to the comparable building materials used for required affordable housing units (18.2.5.050.G.6) to newly allow different housing types. By adding allowances for different “housing types”, the provision would be amended to newly permit affordable units which are of a different housing type than the market rate units. For example, in a new subdivision of detached single-family homes, the affordable units could be attached-SFR, cottages, or apartments and still comply with this standard provided they retain a comparable number of bedrooms to the market rate units. Essentially if a proposal included an affordable housing provider or private developer that wanted to provide apartments or cottages, of a compatible bedroom mix, that could be newly allowable.
 - The Affordable Housing Standards as established do presently require affordable units to be comparable in bedroom size, if all the market rate units are 3 bedrooms, then so should be the affordable units. Staff believes the City could consider allowing different housing types that still provide the commensurate number of bedrooms required. The City has identified a need for rental housing, and for smaller ownership units (e.g cottages/townhomes). By clarifying within the ordinance that alternative housing types are permissible, proposals for annexation and zone changes could more readily provide for a mix of housing needs by providing apartments, cottages, or townhomes within what is otherwise proposed as a detached single-family subdivision.
- Amend the provisions of the Ashland Land Use Ordinance relating to the maximum net assets for households in the affordable housing program (18.2.5.050.C.1.c) to adjust the limits for consumer price index changes since 2005. The current \$20,000 asset limitation, or \$130,000 for retired households purchasing an affordable unit has been unchanged since Resolution 2006-13 was approved. Adjusting these figures to \$25,000 and \$175,000 respectively at this time will update the amounts to the 2020 equivalents. Furthermore, staff would suggest an annual CPI adjustment be included in the final ordinance and resolution language to account for changes over time.
- Amend the provisions of the Ashland Land Use Ordinance requiring a 60-year term of affordability for covered affordable units through annexation or zone changes (18.2.5.050.G.8).
 - Although 60 years of affordability is of benefit to the City in providing affordable housing for longer, there have been concerns raised regarding issues with lenders, conventional lenders can be reluctant to loan on a property where a deed restriction has a term of affordability that extends beyond the typical 30-year term of a mortgage, and with affordable housing developer. Similarly, there were concerns about homeowners feeling like renters under such long deed restrictions. For these reasons Staff suggests deed restricting affordable housing units for a 30-year period of affordability for



ownership units, and a 60-year period for affordable rental units as part of this update of the affordable housing standards.

- Both the Planning and Housing Commissions discussed concerns regarding the reduction of the term of affordability from 60 years to 30 years and wished to further examine potential equity recapture opportunities that could be considered through resale restrictions imposed on covered affordable housing units. To address this concern staff will be presenting a proposed amendment to the resolution regarding System Development Charge deferrals. SDCs deferrals constitute a direct financial subsidy the City provides to qualified affordable housing units. The concept to be presented, as a separate resolution, would be to recapture all or a portion of the original SDC subsidy if an affordable housing unit leaves the program after 30 years of required affordability, but before a 60-year period required for full forgiveness of the deferred SDCs. This method of SDC recapture would mean after 30 years of affordability the homeowner could sell the unit at market rate and pay back the full amount of deferred SDC's including accrued interest. For owners of the affordable housing units maintaining ownership beyond the 30-year term of affordability, the deferred system development charges will be reduced every year thereafter proportionately for a period of 30 years, until year 60 at which point no payback of SDCs would be required.
- Remove the provision of the Ashland Land Use Ordinance that limit the density bonus allowable for affordable housing provided as part of an annexation to 25% (18.2.5.050.G.8). This limit is less than is otherwise allowable through Performance Standards ordinance provisions which allow for 35% maximum density bonus for affordable housing ([18.3.9.050.B.4](#)) and a cumulative bonus of up to 60%, and as such is inconsistent with other density bonus allowances.
 - Amending this section of the ordinance is a good example of creating consistency within the code to eliminate inconsistencies and therefore simplify the application and approval process for annexations. Specifically, this change will enable affordable housing developers to provide as many affordable housing units on a development requiring annexation as could otherwise be achieved upon a property already within the City limits. This promotes the creation of more needed affordable housing within the community.
- Amend the provisions of the Ashland Land Use Ordinance that relate to residential annexations requiring there be less than a five-year supply of vacant or redevelopable land in the current City Limits (18.2.5.050.H.1).
 - Removal of this requirement was a recommendation of the Ashland Housing Strategy Implementation Plan which was presented to the City Council in May of 2019:
 - *“Revise the City’s annexation policies to eliminate the requirement to demonstrate less than a five-year supply of land. Existing policies were intended to help ensure orderly growth; however, this is the role of the City’s Urban Growth Boundary (UGB). Creating obstacles to annexing land within the UGB for housing contributes to higher land costs and makes it difficult to find land for larger housing developments.”*



Next Steps

Planning and Housing Program Staff will present the potential amendments to the affordable housing standards at a public hearing before the Planning Commission at the regular meeting on October 27, 2020 and at a public hearing before the City Council on November 17, 2020. Upon completion of Council's second reading of the ordinance, staff will prepare the corresponding amendments to Resolution 2006-013 to present to Council prior to the effective date of the ordinance.

Attachments

Resolution 2006-13

Affordable Housing Standards Revisions_Stakeholder_Memo

[Council Minutes December 17, 2018](#)

[Planning Commission Minutes March 10, 2020](#)

[Housing and Human Services Commission Minutes July 23, 2020](#)



RESOLUTION NO. 2006- 13

A RESOLUTION AMENDING AND RESOLUTION 2005-46

RECITALS:

- A. WHEREAS, in 1993, the City of Ashland passed Resolution no. 1993-39 which established affordable housing income levels and rental and purchased cost levels.
- B. WHEREAS, in 2005, the City of Ashland passed Resolution 2005-46 which required provisions for homeowner and maintenance fees to be included in the affordability calculations for its affordable housing program.
- C. WHEREAS, neither resolution contained provisions establishing rent levels or purchase price levels for households earning 60%, 80% 100% or 120% of the area median income (AMI).
- D. WHEREAS, neither resolution required Principal, Interest, Taxes and Insurance (PITI) to be included in the maximum housing costs of eligible households in the affordability calculations for the purchasing part of its affordable housing program.
- E. WHEREAS both resolutions used “not-to-exceed purchase price” as a qualifying criterion for purchasing housing units, which criterion requires annual revision, and the current resolution seeks to replace the “not-to-exceed purchase price” with a “percent of household income” criterion which does not require annual revision.
- F. WHEREAS, the City considers that a range of qualifying incomes maximizes the potential for success of its affordable housing program.
- G. WHEREAS, the City desires that PITI be included in the affordability calculations for the various income levels of qualified households and that the “percent of household income” criterion be used in place of the “not-to-exceed purchase price” criterion.

NOW THEREFORE, THE CITY OF ASHLAND RESOLVES AS FOLLOWS:

Resolutions 1993-39 and 2005-46 are hereby amended in their entirety as follows:

SECTION 1. GENERAL ELIGIBILITY – RENTAL AND PURCHASED HOUSING

1.1 All qualifying ownership or rental units required to be affordable through density bonuses, annexation, zone change, condominium conversion, or other land use approval under the Ashland Land Use Ordinance (ALUO) shall not be eligible to receive a waiver of the Community Development and Engineering Services fees associated with the development of said affordable units unless a waiver is approved by the Ashland City Council.

1.2 All qualifying ownership or rental units required to be affordable through density bonuses, annexation, zone change, condominium conversion, or other land use approval under the ALUO shall be eligible to receive a deferral of the System Development Charges associated with the development of said affordable units.

1.3 All qualifying ownership or rental units voluntarily provided as affordable to low income households, consistent with section 1.1 and 1.2, above, shall be eligible for a System Development Charge, Engineering Service, and Community Development Fee deferral or waiver without obtaining approval from the Ashland City Council.

1.4 Affordable Housing Units covered under this Resolution can only be sold or rented to occupant households from the same income category as the original purchasers or renters for a period of not less than 30 years, or as required through the condition of approval for a unit required to be affordable through a land use approval.

1.5 System Development Charges, Engineering Services, and Community Development Fees may be deferred or waived when units are sold or rented to low-income persons. For purposes of this subsection, "low-income persons" means:

a. With regard to rental housing, persons with an income at or below 60 percent of the area median income as determined by the State Housing Council based on information from the United States Department of Housing and Urban Development; and

b. With regard to home ownership housing and lease to purchase home ownership housing, persons with an income at or below 80 percent of the area median income as determined by the State Housing Council based on information from the United States Department of Housing and Urban Development.

2. RENTAL HOUSING -. Units designated for affordable rental housing in developments which have qualified for density bonuses, annexation, zone change, condominium conversion, or other land use approval under the ALUO shall be rented to individuals or households-whose annual income is consistent with the target income identified in the planning approval. Incomes shall be qualified at the 60% or 80% median income levels for households in the Medford-Ashland Metropolitan Statistical Area (MSA). This figure shall be known as the "qualifying household income" and shall be determined by the City's Department of Community Development in May of each year from the annual family incomes published by the U.S. Department of Housing and Urban Development (HUD) for the Medford-Ashland Metropolitan Service Area (MSA).

2.1 Area Median Income – 80%. The rent charged for such affordable rental housing benefiting households earning 80% Area Median Income or greater, including any home-owners association or maintenance fees, shall not exceed 23% of the qualifying monthly income (qualifying family income divided by twelve) as provided in the following formulas:

Studio Apartment	23% of the average of 1 & 2 person qualifying monthly incomes
1 Bedroom	23% of the average of 2 & 3 person qualifying monthly incomes
2 Bedroom	23% of the average of 3, 4, & 5 person qualifying monthly incomes
3 Bedroom	23% of the average of 4, 5, 6, & 7 person qualifying monthly incomes
4 Bedroom	23% of the average of 5, 6, 7, & 8 person qualifying monthly incomes

The City's Department of Community Development shall maintain a table of maximum rent levels permitted under these formulas and shall annually update the table in May of each year.

2.2 Area Median Income – 60% or lower. The rent charged for such affordable rental housing benefiting households earning 60% Area Median Income or less, including any home-owners association or maintenance fees, shall comply with the maximum rents established by the State of Oregon HOME Program based on the target income qualification as adjusted annually by the Department of Housing and Urban Development for the Medford-Ashland Metropolitan Service Area. The HOME program indexed allowable rents are adjusted annually by the State of Oregon Housing and Community Services Department (OHCS).

2.3. Owner's Obligation. The owner of the affordable rental housing shall sign a 30-year agreement, or longer depending on the period of affordability established through the ALUO, with the City of Ashland that guarantees these rent levels will not be exceeded and that the owner will rent only to households meeting the income limits. The agreement shall bind subsequent owners who purchase the rental housing during the established period of affordability. The agreement shall also require the owner to allow the unit to be rented to HUD Section 8 qualified applicants and agree to accept rent vouchers for all of the affordable units when applicable. The City shall file the agreement for recordation in the County Clerk deed records, Jackson County, Oregon.

2.3.1. Certification of qualifying occupants. The owner of record, or the designated agent of the record, owner, shall annually file with the City of Ashland a signed certificate stating the occupants of the record owner's rental housing units continue to be qualified households, or are a household that qualified at its initial occupancy, within the meaning of this Resolution, and any amendment made to it. The City of Ashland shall provide the record owner or the record owner's agent with access to a form to complete and sign to comply with this provision.

3. PURCHASED HOUSES - QUALIFYING. Units designated for affordable housing available for purchase in developments which have qualified for density

bonuses annexation, zone change, condominium conversion , or other land use approval under the ALUO must satisfy two criteria.

1. They shall only be sold to occupant households whose:
 - a. Annual income is consistent with the target income identified in the planning approval for the development. Incomes shall be qualified at the applicable 60%, 80%, 100% or 120% median income levels for households based on number of people per household as adjusted annually by the Department of Housing and Urban Development for the Medford-Ashland Metropolitan Service Area.
 - i. The maximum monthly payment for a covered unit shall be established to not exceed the affordability limits, established above, indicated in following table:

Studio = 1 person household income for the designated income level
1 Bedroom = 2 person household income for the designated income level
2 Bedroom = 4 person household income for the designated income level
3 Bedroom = 6 person household income for the designated income level
4 Bedroom = 7 person household income for the designated income level
Households with a greater or lesser number of occupants shall remain eligible for covered units but the sale price shall not be adjusted due to household size above the limits established above.
 - b. Net assets, excluding pension plans and IRA's and excluding the down payment and closing costs, do not exceed \$20,000 for a household or \$130,000 if one household member is 65 years or older.
 - c. Mortgage payment does not exceed more than 30% of the monthly income for the target income level indicated in 3.1(a)(i) on total housing costs which includes PITI and any homeowners or regular maintenance fees.
 - d. The maximum monthly payment for a covered unit shall be calculated by utilizing the interest rate for the Oregon Bond Loan Rate Advantage as updated by the State of Oregon Housing and Community Services Department.
2. They shall remain affordable as follows:
 - a. The purchasers of the affordable housing units shall agree to the City of Ashland Affordable Housing Resale Restriction Agreement establishing a period of affordability of not less than 30 years. In no event will a purchaser be required to sell the unit subject to the aforementioned

Agreement for less than his or her original purchase price, plus any applicable closing costs and realtor fees.

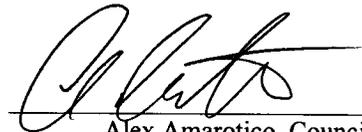
b. For housing financed by Farmer's Home Administration (FmHA), the affordability shall be assured by the FmHA's recapture provisions FmHA which require sellers to repay FmHA for all the subsidies accrued during the period the sellers resided in the housing unit.

SECTION 2. EFFECTIVE DATE. This Resolution takes effect upon signing by the Mayor.

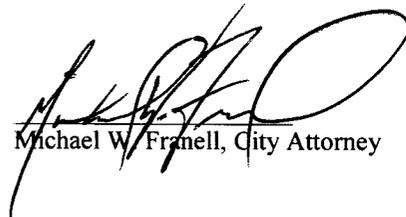
This resolution was read by title only in accordance with Ashland Municipal Code §2.04.090 duly PASSED and ADOPTED this 21 day of June, 2006.


Barbara Christensen, City Recorder

SIGNED and APPROVED this 21 day of June, 2006.


Alex Amarotico, Council Chair

Review as to form:


Michael W. Frannell, City Attorney

Memo

DATE: 9/24/2020

TO: Ashland Housing and Human Services Commission
Ashland Planning Commission
Ashland City Council

FROM: Brandon Goldman, Senior Planner
Linda Reid, Housing Program Specialist

RE: Affordable Housing Standards – Stakeholder meeting

On August 11th and August 14th, 2020 meetings were convened consisting of City Staff, Elected and Appointed officials, and members of the development communities representing both affordable housing providers and market-rate housing developers. Those in attendance at one or both meetings included:

Elected and Appointed Officials

Dennis Slattery, City Council
Alan Harper, Planning Commission
Rich Rohde, Housing & Human Services
Commission

Affordable Housing Providers

Cindy Dyer, Columbia Care
Denise James, Habitat for Humanity
Ryan Haynes, Housing Authority of
Jackson County
Brian Shelton-Kelley, NeighborWorks
Umpqua

City of Ashland Staff

Bill Molnar, Community Dev. Director
Brandon Goldman, Senior Planner
Linda Reid, Housing Specialist

Market Rate Developers

Kyle Taylor, Taylored Elements
Mark Knox, KDA Homes
Laz Ayala, KDA Homes
Rick Harris, Realtor

During the stakeholder meeting(s) open discussion among the participants explored the intended and potentially unintended consequences of the draft revisions to the affordable housing standards. The group explored Ashland's existing Affordable Housing Standards and discussed whether the changes being considered would help or hinder the production of affordable housing. Through these discussions it was evident that the production of affordable housing benefiting households earning less than 80% the area median income could best be achieved by coordination between market-rate developers and affordable housing providers. Below is a summary of various issues discussed by the meeting



participants. Staff was able to take these discussions into consideration and incorporate changes into the draft ordinance being presented to the Commissions and Council for consideration.

60-year versus a 30-year term of affordability:

Annexations and Zone Change standards within the Ashland Land Use Ordinance currently require the affordable units remain affordable for 60 years. Both market-rate developers and Affordable Housing Developers expressed that the standard applying equally to both rentals and ownership did not afford buyers of affordable housing units to realize equity returns. Specifically, Habitat for Humanity noted that the 60-year restriction was too long and did not work with Habitats equity share model where they sell the finished home to the homeowner for the appraised cost, then recapture a portion of the equity upon resale. Affordable housing providers further noted that a 60-year term for affordable rental housing did align with other restrictions from primary funding sources such as the Low-Income Housing Tax Program. It was further expressed that a 30-year cap for affordable ownership units would be better for lenders and homeowners. Additionally, it was stated that ownership housing is a tiered system that provides for upward mobility, and as such affordable housing can provide the entry tier for homeownership, and a 30-year term would better address this mobility objective. The Housing Authority of Jackson County noted that to be competitive in obtaining state or federal funding for an affordable rental housing project, a 60-year term is standard. This discussion raised the issue that instead of changing the existing 60-year requirement to 30 years for all affordable units, perhaps the final ordinance could provide differing periods of affordability for affordable rental housing and affordable ownership housing.

Distribution of affordable housing throughout the Development:

Annexations and Zone Change standards within the Ashland Land Use Ordinance currently require that the affordable units provided shall be distributed throughout the project. The stakeholders did discuss existing ordinance’s underlying intent to not cluster all the affordable units together and create a separate neighborhood of low-income residences. It was also expressed that the size of Ashland’s developable properties leads to smaller developments where such segregation or “stigmatization” of low-income housing has not been evident. Noting that as such small developments are not impacted by the social justice issue the ordinance intended to address, a market rate developer explained that needing to provide some of the the highest value land to the affordable units due to the distribution requirement undercuts the developer’s ability to “subsidize” the units through the sale of the market rate units. The participants in the meeting(s) were in general agreement that removal of the distribution requirement would help facilitate the development of affordable housing.

Transfer of land to a non-profit affordable housing provider:

Annexations and Zone Change standards within the Ashland Land Use Ordinance currently provide an option that a market rate developer can transfer land to an affordable housing provider or public corporation to satisfy the affordable housing requirement. However, this standard is presently unclear as to whether this also satisfies the timing requirements for affordable housing to be developed concurrent with the market rate homes. In discussing this potential clarification regarding transfer of land, the participants expressed that the creation of affordable housing has historically been accomplished through a transfer to an affordable housing provider. Private market developers explained that they don’t have the same access to affordable housing financing programs that the non-profits have and such partnership with an affordable housing provider is key. Further it was noted that holding costs of the property to the private market developer were a barrier and if they could transfer it to the affordable housing developer early in the process that would assist in their financial project pro formas. It was also noted



that upon receipt of transferred land, an affordable housing provider would seek development financing and that competitive process and award cycle is out of the control of the market rate development. As there was general agreement that the transfer of land to an affordable housing provider was advantageous to creating affordable housing, and that the market rate development should be able to move forward independent of the development of the affordable housing once the transfer is complete.

Maximum Resale and Maximum Rental Formulas.

The proposed changes to the affordable housing standards include revisions to how the resale value of ownership units is calculated, as well as changing the formula calculation for affordable rents. Stakeholder participants were favorable to moving the ownership calculation from the current variable formula to a fixed rate formula as it was noted that having such clarity in the resale formula is really helpful for homeowners and is beneficial in application with a land trust model. It was further supported in that a fixed rate formula provides some predictable equity return for the homeowner. There was concern that the 1.5% rate may be insufficient to keep up with market rate appreciation. Affordable rental providers were favorable to changing the rental rate formula to be indexed using the HOME program as proposed, but further questioned whether the formula could also consider the maximum rents per the Low Income Housing Tax Credit program for projects that receive LIHTC funding. In consideration of these differing indexes, and in acknowledging that LIHTC is a significant funding source for larger rental developments, Staff has modified the draft ordinance to address this issue.

Conclusion

Overall, the stakeholder meetings allowed members of the development community to review the proposals being considered and provide early input to help shape the final ordinance. In addition to providing direct feedback early in the process, the meetings also functioned to inform the participants of the potential changes, so they are better able to provide informed testimony at the future public hearings. Attendees voiced that workforce housing (moderate income/ownership) programs should be supported through the jurisdiction and Affordable housing (low-income/rentals) are best accomplished through transfer of land to affordable housing providers who are better equipped to undertake and manage such developments. The opportunity for market-rate developers and non-profit affordable housing developers to meet and discuss the program together further clarified that their efforts to develop affordable housing in Ashland is best accomplished through partnerships. The changes proposed to the Affordable Housing Standards within the Ashland Land Use Ordinance should function to facilitate such coordination.



ORDINANCE NO. [2020-xxxx]

AN ORDINANCE AMENDING CHAPTERS 18.2.3, 18.2.5, 18.5.8 AND 18.5.9 OF THE ASHLAND LAND USE ORDINANCE REGARDING CONVERSION OF MULTI-FAMILY RENTAL UNITS INTO FOR-PURCHASE HOUSING, AFFORDABLE HOUSING STANDARDS, AND APPROVAL STANDARDS FOR ZONE CHANGES AND ANNEXATIONS.

Annotated to show ~~deletions~~ and **additions** to the code sections being modified. Deletions are **bold lined through** and additions are in **bold underline**.

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 above referenced grant of power has been interpreted as affording all legislative powers home rule constitutional provisions reserved to Oregon Cities. City of Beaverton v. International Ass'n of Firefighters, Local 1660, Beaverton Shop 20 Or. App. 293; 531 P 2d 730, 734 (1975); and

WHEREAS the City of Ashland recognizes that under Goal 10 of Oregon's Statewide Planning Goals & Guidelines (OAR 660-015-0000(10)) that jurisdictions shall encourage the availability of adequate numbers of needed housing units at price ranges and rent levels which are commensurate with the financial capabilities of Oregon households and allow for flexibility of housing location, type and density; and

WHEREAS, the Housing Element of the City of Ashland Comprehensive Plan establishes the goal of supporting the creation and preservation of housing that is affordable to low- and moderate-income households and that is commensurate with the incomes of Ashland's workforce; and

WHEREAS the City of Ashland City Council recognizes that for a healthy community the provision of a range of affordable housing is a top priority for the City of Ashland; and

WHEREAS, the City Council of the City of Ashland has determined that neither the private market, nor the public sector, has yet provided the levels of housing affordability necessary to maintain a balanced community, local government must take an active lead to ensure an adequate supply of housing for residents and working people of all income levels;

WHEREAS, the City of Ashland Housing and Human Services Commission conducted on September 24th, 2020 a duly advertised public meeting on amendments to the Ashland Land Use Ordinance concerning the standards relating to affordable housing, and standards for zone changes and annexations, and following deliberations recommended [REDACTED] of the amendments;

WHEREAS, the City of Ashland Planning Commission conducted on [REDACTED] a duly advertised public hearing on amendments to the Ashland Land Use Ordinance concerning the standards relating to affordable housing, and standards for zone changes and annexations, and following deliberations recommended [REDACTED] of the amendments;

WHEREAS, the City Council of the City of Ashland conducted a duly advertised public hearing on the above-referenced amendments [REDACTED]; and

WHEREAS, the City Council of the City of Ashland, following the close of the public hearing and record, deliberated and conducted first and second readings approving adoption of the Ordinance in accordance with Article 10 of the Ashland City Charter.

WHEREAS, the City Council of the City of Ashland has determined that in order to protect and benefit the health, safety and welfare of existing and future residents of the City, it is necessary to amend the Ashland Municipal Code and Land Use Ordinance in manner proposed, that an adequate factual base exists for the amendments, the amendments are consistent with the comprehensive plan and that such amendments are fully supported by the record of this proceeding.

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

SECTION 1. The above recitations are true and correct and are incorporated herein by this reference.

SECTION 2. The Special Use Standards Chapter of Ashland Land Use Ordinance, sub-section 18.2.3.200.C.5 is hereby amended as follows:

18.2.3.200 Multiple-Family Rental Unit Conversion to For-Purchase Units

18.2.3.200.C

5. Affordable Housing Units provided under 18.2.3.200.C.2 and 18.2.3.200.C.3 shall meet the following affordability standards:

a. Affordable Rental Units shall be affordable for rent by households earning at or below ~~60~~ **80** percent of the AMI in accordance with the standards established by section 18.2.5.050 (~~Resolution 2006-13~~).

b. Affordable Ownership Units shall be affordable for purchase by households earning at or below 80 percent of the AMI in accordance with the standards established by section 18.2.5.050 (~~Resolution 2006-13~~).

SECTION 3. The Standards for Residential Zones Chapter of Ashland Land Use Ordinance subsection 18.2.5.050, Affordable Housing Standards, is hereby amended as follows:

18.2.5.050 Affordable Housing Standards

A. General Eligibility – Rental and Purchased Housing.

1. All qualifying ownership or rental units required to be affordable through density bonuses, annexation, zone change, condominium conversion, or other land use approval under this ordinance shall not be eligible to receive a waiver of the Community Development and Engineering Services fees associated with the development of said affordable units unless a waiver is approved by the City Council.
2. All qualifying ownership or rental units required to be affordable through density bonuses, annexation, zone change, condominium conversion, or other land use approval under this ordinance shall be eligible to receive a deferral of the System Development Charges associated with the development of said affordable units.
3. All qualifying ownership or rental units voluntarily provided as affordable to low income households, consistent with subsections 18.2.5.050.A.1 and 18.2.5.050.A.2, above, shall be eligible for a System Development Charge, Engineering Service, and Community Development Fee deferral or waiver without obtaining approval from the Council.
4. Affordable Housing Units covered under this section can only be sold or rented to occupant households from the same income category as the original purchasers or renters for a period of not less than 30 years, or as required through the condition of approval for a unit required to be affordable through a land use approval.
5. System Development Charges, Engineering Services, and Community Development Fees may be deferred or waived when units are sold or rented to low-income persons. For purposes of this subsection, "low-income persons" means:
 - a. With regard to rental housing, persons with an income at or below 60 percent of the area median income (AMI) as determined by the State Housing Council based on information from the United States Department of Housing and Urban Development (HUD); and
 - b. With regard to home ownership housing and lease to purchase home ownership housing, persons with an income at or below 80 percent of the AMI as determined by the State Housing Council based on information from HUD.

B. Rental Housing. Units designated for affordable rental housing in developments which have qualified for density bonuses, annexation, zone change, condominium conversion, or other land use approval under this ordinance shall be rented to individuals or households whose annual income is consistent with the target income identified in the planning approval. Incomes

shall be qualified as being equal to or less than either at the 60 percent or 80 percent median income levels maximums annually established for households in the Medford-Ashland Metropolitan Statistical Area (MSA). This figure shall be known as the "qualifying household income" and shall be determined by the City's Community Development Department in May of each year from the annual family incomes published by HUD for the Medford-Ashland MSA.

1. Area Median Income – 60 and 80 percent. The rent charged for such affordable rental housing benefiting households earning 60 percent Area Median Income or less, and 80 percent AMI of Area Median Income or greater-less, including any home-owners association or maintenance fees, shall not exceed 23 percent of the qualifying monthly income (qualifying family income divided by twelve) as provided in the following formulas: not exceed 23 percent of the qualifying monthly income (qualifying family income divided by twelve) as provided in the following formulas: comply with the maximum rents established by U.S. Department of Housing and Urban Development (HUD) for the HOME program for the corresponding bedroom size.

~~Table 18.2.5.050.B. Rent Charges for Affordable Rental Housing~~

Unit Type	Maximum Rent Charges
Studio Apartment	23% of the average of 1 & 2 person qualifying monthly incomes
1 Bedroom	23% of the average of 2 & 3 person qualifying monthly incomes
2 Bedroom	23% of the average of 3, 4, & 5 person qualifying monthly incomes
3 Bedroom	23% of the average of 4, 5, 6, & 7 person qualifying monthly incomes
4 Bedroom	23% of the average of 5, 6, 7, & 8 person qualifying monthly incomes

- a. The City's Community Development Department shall maintain a table of maximum rent levels permitted pursuant to the formulas of Table 18.2.5.050.B established by U.S. Department of Housing and Urban Development (HUD) for the HOME program and shall annually update the table in May of each year.
- b. The HUD "Low Rent" limit shall apply to units targeted toward households earning 60% of Area Median Income or less.

- c. The HUD “High Rent” limit shall apply to units targeted toward households earning greater than 60% Area Median Income up to and including 80% of Area Median Income.
- d. Low-Income Housing Tax Credit (LIHTC) assisted affordable rental housing units, subject to rent control through the LIHTC program, may utilize the rent limits established by the LIHTC program as an alternative to the rent levels established by U.S. Department of Housing and Urban Development (HUD) for the HOME program. Upon completion of the LIHTC compliance period the maximum rent levels established in 18.2.5.050.B.1.a-c shall apply through the remaining term of affordability.

~~2. Area Median Income – 60 percent or lower. The rent charged for such affordable rental housing benefiting households earning 60 percent AMI or less, including any home-owners association or maintenance fees, shall comply with the maximum rents established by the State of Oregon HOME Program based on the target income qualification as adjusted annually by HUD for the Medford-Ashland MSA. The HOME program indexed allowable rents are adjusted annually by the State of Oregon Housing and Community Services Department (OHCS).~~

3. Owner’s Obligation. The owner of the affordable rental housing shall sign a 30-year agreement, or longer depending on the period of affordability established through **this ordinance a planning action approval or legislative land use decision**, with the City that guarantees these rent levels will not be exceeded and that the owner will rent only to households meeting the income limits. The agreement shall bind subsequent owners who purchase the rental housing during the established period of affordability. The agreement shall also require the owner to allow the unit to be rented to HUD Section 8 qualified applicants and agree to accept rent vouchers for all of the affordable units when applicable. The City shall file the agreement for recordation in the County Clerk deed records, Jackson County, Oregon.

4. Certification of qualifying occupants. The owner of record, or the designated agent of the record, owner, shall annually file with the City a signed certificate stating the occupants of the record owner’s rental housing units continue to be qualified households, or are a household that qualified at its initial occupancy, within the meaning of this resolution, and any amendment made to it. The City shall provide the record owner or the record owner’s agent with access to a form to complete and sign to comply with this provision.

C. Purchased Houses – Qualifying. Units designated for affordable housing available for purchase in developments which have qualified for **affordable housing** density bonuses, annexation, zone change, condominium conversion, or other land use approval under this ordinance must satisfy the criteria in subsections 18.2.5.050.C.1 and 18.2.5.050.C.2, below:

1. They shall only be sold to occupant households whose:
 - a. Annual income is consistent with the target income identified in the planning approval for the development. Incomes shall be qualified at the applicable ~~60 percent~~, 80 percent, 100 percent, or 120 percent median income levels for households based on number of people per household as adjusted annually by HUD for the Medford-Ashland **MSA Metropolitan Service Area (MSA)**.

b. The maximum initial purchase price shall be determined on the date the designated affordable unit enters the affordable housing program. The maximum initial purchase price is based on a formula that accounts for what a qualifying household can afford to pay as a maximum monthly housing payment. The formula used to calculate the maximum monthly housing payment incorporates the following:

- i. **The maximum monthly housing payment shall not exceed 30% of the monthly income for the target income level indicated in subsection 18.2.5.050.C.1.a.**
- ii. **The formula used to calculate the monthly housing payment shall include Principal, Interest, Taxes, and Insurance (PITI) and any homeowners or regular maintenance fees.**
- iii. **The formula used to calculate the monthly housing payment will assume a down payment equal to 10% of the purchase price.**
- iv. **The formula used to calculate monthly housing payment will assume a 30-year fixed-rate mortgage with an interest rate of 5%.**

~~b. c.~~ The maximum monthly **housing** payment for a covered unit shall be established to not exceed the affordability limits, established in ~~the paragraph above this section~~, and pursuant to the occupancy number indicated in Table 18.2.5.050.C.

Table 18.2.5.050.C. Occupancy Basis for Affordable ~~Rental~~ Ownership Housing

Unit Type		Occupancy
Households with a greater or lesser number of occupants shall remain eligible for covered units but the sale price shall not be adjusted due to household size above the limits established above.		
Studio	=	1 person household income for the designated income level
1 Bedroom	=	2 person household income for the designated income level

Unit Type		Occupancy
2 Bedroom	=	4 <u>3</u> person household income for the designated income level
3 Bedroom <u>or greater</u>	=	6 <u>5</u> person household income for the designated income level
4 Bedroom	=	7 person household income for the designated income level

c. Net assets, excluding pension plans and IRAs and excluding the down payment and closing costs, do not exceed ~~\$20,000~~ \$25,000 for a household or ~~\$130,000~~ \$175,000 if one household member is 65 years or older.

~~d. Mortgage payment does not exceed more than 30 percent of the monthly income for the target income level indicated in subsection 18.2.5.050.C.1.a, above on total housing costs which includes principal, interest, taxes, insurance, and any homeowners or regular maintenance fees.~~

~~e. The maximum monthly payment for a covered unit shall be calculated by utilizing the interest rate for the Oregon Bond Loan Rate Advantage as updated by the OHCS.~~

2. They shall remain affordable as follows:

a. The purchasers of the affordable housing units shall agree to the City of Ashland Affordable Housing Resale Restriction Agreement establishing a period of affordability of not less than 30 years. ~~In no event will a purchaser be required to sell the unit subject to the aforementioned Agreement for less than his or her original purchase price, plus any applicable closing costs and realtor fees.~~

b. The maximum resale price will be calculated using the current seller's initial purchase price plus an additional 0.125% of said initial purchase price for each full month the current seller has owned the home.

c. In no event will a purchaser be required to sell the unit subject to the Affordable Housing Resale Restriction Agreement for less than his or her original purchase price, plus any applicable closing costs and realtor fees.

~~b. For housing financed by Farmer's Home Administration (FHA), the affordability shall be assured by the FHA's recapture provisions FHA which require sellers to repay FHA for all the subsidies accrued during the period the sellers resided in the housing unit.~~

SECTION 4. The Annexations Chapter of Ashland Land Use Ordinance, sub-sections 18.5.8.050.C, 18.5.8.050.G and 18.5.8.050.H are hereby amended as follows:

Annexation

18.5.8.050 Approval Criteria and Standards

An annexation may be approved if the proposed request for annexation conforms, or can be made to conform through the imposition of conditions, with all of the following approval criteria.

- A.** The land is within the City’s Urban Growth Boundary.
- B.** The proposed zoning for the annexed area is in conformance with the designation indicated on the Comprehensive Plan Map, and the project, if proposed concurrently with the annexation, is an allowed use within the proposed zoning.
- C.** The land is currently contiguous with the present city limits.
- D.** Adequate City facilities for the provision of water to the site as determined by the Public Works Department; the transport of sewage from the site to the waste water treatment plant as determined by the Public Works Department; the provision of electricity to the site as determined by the Electric Department; urban storm drainage as determined by the Public Works Department can and will be provided to and through the subject property. Unless the City has declared a moratorium based upon a shortage of water, sewer, or electricity, it is recognized that adequate capacity exists system-wide for these facilities.
- E.** Adequate transportation can and will be provided to and through the subject property. For the purposes of this section "adequate transportation" for annexations consists of vehicular, bicycle, pedestrian, and transit transportation meeting the following standards.
 - 1. For vehicular transportation a 20-foot wide paved access exists, or can and will be constructed, along the full frontage of the project site to the nearest fully improved collector or arterial street. All streets adjacent to the annexed area shall be improved, at a minimum, to a half-street standard with a minimum 20-foot wide driving surface. The City may, after assessing the impact of the development, require the full improvement of streets adjacent to the annexed area. All streets located within annexed areas shall be fully improved to City standards. Where future street dedications are indicated on the Street Dedication Map or required by the City, provisions shall be made for the dedication and improvement of these streets and included with the application for annexation.
 - 2. For bicycle transportation safe and accessible bicycle facilities exist, or can and will be constructed. Should the annexation be adjacent to an arterial street, bike lanes shall be provided on or adjacent to the arterial street. Likely bicycle destinations from the project site shall be determined and safe and accessible bicycle facilities serving those destinations shall be indicated.

3. For pedestrian transportation safe and accessible pedestrian facilities exist, or can and will be constructed. Full sidewalk improvements shall be provided on one side adjacent to the annexation for all streets adjacent to the proposed annexed area. Sidewalks shall be provided as required by ordinance on all streets within the annexed area. Where the project site is within a quarter of a mile of an existing sidewalk system, the sidewalks from the project site shall be constructed to extend and connect to the existing system. Likely pedestrian destinations from the project site shall be determined and the safe and accessible pedestrian facilities serving those destinations shall be indicated.

4. For transit transportation, should transit service be available to the site, or be likely to be extended to the site in the future based on information from the local public transit provider, provisions shall be made for the construction of adequate transit facilities, such as bus shelters and bus turn-out lanes. All required transportation improvements shall be constructed and installed prior to the issuance of a certificate of occupancy for any new structures on the annexed property.

F. For all residential annexations, a plan shall be provided demonstrating that the development of the entire property will ultimately occur at a minimum density of 90 percent of the base density for the zone, unless reductions in the total number of units is necessary to accommodate significant natural features, topography, access limitations, or similar physical constraints. The owner or owners of the property shall sign an agreement, to be recorded with the county clerk after approval of the annexation, ensuring that future development will occur in accord with the minimum density indicated in the development plan. For purposes of computing maximum density, portions of the annexed area containing undevelopable areas such as wetlands, floodplain corridor lands, or slopes greater than 35 percent, shall not be included.

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

1. The total number of affordable units provided to qualifying buyers, or to qualifying renters, shall be equal to or exceed 25 percent of the base density as calculated using the unit equivalency values set forth herein. **The base density of the property for the purposes of this calculation shall exclude any undevelopable portions of the property such as wetlands, floodplain corridor lands, water resource areas, slopes greater than 35 percent, or land area dedicated as a public park.**

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

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

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

~~d. Ownership or Rental units restricted to households earning at or below 60 percent the area median income shall have an equivalency value of 1.5 unit.~~

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

a. The land to be transferred shall be located within the project meeting the standards set forth in 18.5.8.050.G, subsections 4 - 6.

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

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

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

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

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

Table 18.5.8.050.G.3.

Unit Type	Minimum Required Unit Floor Area (Square Feet)
Studio	350
1 Bedroom	500
2 Bedroom	800

Unit Type	Minimum Required Unit Floor Area (Square Feet)
3 Bedroom	1,000
4 Bedroom	1,250

~~b. The required on-site affordable units shall be comprised of the different unit types in the same proportion as the market dwelling units within the development.~~

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

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

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

c. Transfer of title of buildable land to a non-profit (IRC 501(3)(c) affordable housing developer, or public corporation, shall be considered a demonstration that 18.5.8.050G.4(a) and 18.5.8.050G.4(b) are satisfied, provided the transferred land is deed restricted to be developed as affordable housing in compliance with subsection 18.5.8.050.G.2 and the transfer of title is completed prior to the issuance of a certificate of occupancy for the last of the first 25% of the market rate units.

~~5. That affordable housing units shall be distributed throughout the project.~~

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

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

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

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

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

~~b. That an alternative mix of housing types not meeting the requirements of subsection 18.5.8.050.G.3.b would accomplish additional benefits to the City consistent with this chapter, than would the development providing a proportional mix of unit types.~~

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

~~d. That the distribution of affordable units within the development not meeting subsection 18.5.8.050.G.5 is necessary for development of an affordable housing project that provides onsite staff with supportive services.~~

~~e. That the distribution of affordable units within the development as proposed would accomplish additional benefits for the city, consistent with the purposes of this chapter, than would development meeting the distribution requirement of subsection 18.5.8.050.G.5.~~

~~f. c.~~ That the materials and amenities applied to the affordable units within the development, that are not equivalent to the market rate units per subsection 18.5.8.050.G.6, are necessary due to local, State, or Federal Affordable Housing standards or financing limitations.

8. The total number of affordable units described in this section 18.5.8.050.G shall be determined by rounding down fractional answers to the nearest whole unit. A deed restriction or similar legal instrument shall be used to guarantee compliance with affordable criteria for a period of not less than 60 years for units qualified as affordable rental housing, or 30 years for units qualified as affordable for-purchase housing. ~~Properties providing affordable units as part of the annexation process shall qualify for a maximum density bonus of 25 percent.~~

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

1. The proposed area for annexation is to be residentially zoned, ~~and there is less than a five-year supply of vacant and redevelopable land in the proposed land use classification within the current city limits. “Redevelopable land” means land zoned for residential use on which development has already occurred but on which, due to present or expected market forces, there exists the likelihood that existing development will be converted to more intensive residential uses during the planning period. The five-year supply shall be determined from vacant and redevelopable land~~

~~inventories and by the methodology for land need projections from the Housing Element of the Comprehensive Plan, under the Comprehensive Plan, and that the applicant will obtain planning action approval for an outright permitted use, special permitted use, or conditional use in conformance with the annexation request.~~

2. The proposed lot or lots will be zoned **M-1**, CM, E-1, or C-1 under the Comprehensive Plan, and that the applicant will obtain Site Design Review approval for an outright permitted use, or special permitted use concurrent with the annexation request.
3. A current or probable public health hazard exists due to lack of full City sanitary sewer or water services.
4. Existing development in the proposed annexation has inadequate water or sanitary sewer service, or the service will become inadequate within one year.
5. The area proposed for annexation has existing City water or sanitary sewer service extended, connected, and in use, and a signed consent to annexation agreement has been filed and accepted by the City.
6. The lot or lots proposed for annexation are an island completely surrounded by lands within the city limits.

SECTION 5. The Application Review Procedures and Approval Criteria Chapter of Ashland Land Use Ordinance, subsection 18.5.9.020.A is hereby amended as follows:

18.5.9.020 Applicability and Review Procedure

Applications for Plan Amendments and Zone Changes are as follows:

- A. Type II.** The Type II procedure is used for applications involving zoning map amendments consistent with the Comprehensive Plan map, and minor map amendments or corrections. Amendments under this section may be approved if in compliance with the Comprehensive Plan and the application demonstrates that one or more of the following.
1. The change implements a public need, ~~other than the provision of affordable housing,~~ supported by the Comprehensive Plan.
 2. A substantial change in circumstances has occurred since the existing zoning or Plan designation was proposed, necessitating the need to adjust to the changed circumstances.
 3. Circumstances relating to the general public welfare exist that require such an action.
 4. Proposed increases in residential zoning density resulting from a change from one zoning district to another zoning district, will provide 25 percent of the proposed base density as affordable housing consistent with the approval standards set forth in subsection 18.5.8.050.G.

5. Increases in residential zoning density of four units or greater on commercial, employment, or industrial zoned lands (i.e., Residential Overlay), will not negatively impact the City's commercial and industrial land supply as required in the Comprehensive Plan, and will provide 25 percent of the proposed base density as affordable housing consistent with the approval standards set forth in subsection 18.5.8.050.G.

6. The total number of affordable units described in 18.5.9.020.A, subsections 4 or 5, above, shall be determined by rounding down fractional answers to the nearest whole unit.

7. A deed restriction, or similar legal instrument, shall be used to guarantee compliance with affordable criteria for a period of not less than 60 years **for units qualified as affordable rental housing, or 30 years for units qualified as affordable for-purchase housing**.. 18.5.9.020.A subsections 4 and 5 do not apply to Council initiated actions.

SECTION 6. Severability. The sections, subsections, paragraphs and clauses of this ordinance are severable. The invalidity of one section, subsection, paragraph, or clause shall not affect the validity of the remaining sections, subsections, paragraphs and clauses.

SECTION 7. Codification. Provisions of this Ordinance shall be incorporated in the City Comprehensive Plan 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 1, 6-7) need not be codified. In preparing this ordinance for publication and distribution, the City Recorder shall not alter the sense, meaning, effect, or substance of the ordinance, but within such limitations, may:

- (a) Renumber sections and parts of sections of the ordinance;
- (b) Rearrange sections;
- (c) Change reference numbers to agree with renumbered chapters, sections or other parts;
- (d) Delete references to repealed sections;
- (e) Substitute the proper subsection, section, or chapter numbers;
- (f) Change capitalization and spelling for the purpose of uniformity;
- (g) Add headings for purposes of grouping like sections together for ease of reference; and
- (h) Correct manifest clerical, grammatical, or typographical errors.

The foregoing ordinance was first read by title only in accordance with Ashland Municipal Code §2.04.090 on the _____ day of _____, 2020,
and duly PASSED and ADOPTED this _____ day of _____, 2020.

Melissa Huhtala, City Recorder

SIGNED and APPROVED this ____ day of _____, 2020.

John Stromberg, Mayor

Reviewed as to form:

David Lohman, City Attorney

Memo

DATE: September 24, 2020
TO: Housing and Human Services Commission
FROM: Linda Reid, Housing Program Specialist
RE: Cahoots Program Update

Commission Chair Rich Rohde has an update regarding the Cahoots Mobile Mental Health Crisis Program based in Eugene, Oregon.



Memo

DATE: September 24, 2020

TO: Housing and Human Services Commission

FROM: Linda Reid, Housing Program Specialist

RE: Utility Assistance Update

In March of this year the Housing and Human Services Commission made a recommendation based on the work of the Utility Ad Hoc Group members: (SVdP-John Englehardt, OHRA-Jackie Bachman, H&HS Commission Chair-Rich Rohde, City Council Liaison-Dennis Slattery, City Administrator-Kelly Madding). Due to Covid implementation of these items was put on hold, as the Utility Department suspended Utility shut offs. Staff will provide an update of recommended actions which have taken place.

1. Increase awareness of utility assistance programs to those in need

- a) Mailer included with utility bill and city source newsletter showing programs and income levels associated with each. Make it colorful and easy to read!
- b) When client calls Utility office for help in paying their bill, work with them to see if they are eligible for any assistance programs.
- c) When client calls Utility office for help and is not eligible for programs, refer them to sources of help: OHRA, SVdP, Access, Salvation Army, etc.
- d) Get ACCESS involved in signing people up for assistance here in town.

2. Expand awareness of ways citizens can contribute to Assistance Funding

- a) Expand *Round Up* program to allow for additional \$ contributions
- b) Make donation process easy for ongoing contributions as well as one-time donations.
- c) Make it clear that the donations are dedicated to Assistance programs
- d) Reach out to churches and other NGOs to spread the word about the assistance programs and donation process

3. Reorganize the utility shut-off door hanger

- a) Mention all 3 assistance programs on the door hanger
- b) Reorder the list of agencies that can provide help: OHRA, SVdP, Access, Salvation Army, AFS, JCFC

4. Track signups for assistance programs for historical data analysis and success of efforts going forward

- a) Provide periodic reports to Ashland's Housing and Human Service Commission in collaboration with OHRA and SVdP on success of recommendations being



implemented (ex: # clients on each assistance program, # accounts participating in Round Up and other donation options, etc.)

5. Analyze the Call-Out process for efficiency, success, and response in collaboration with OHRA & SVdP to include:

- a) Comparison with pre-callout success rate (# responding after 1st door hanger)
- b) Exploration of why the # of door notices and disconnects increased substantially in 2019, concomitant with implementation of Call-Out process
- c) Send analysis to city's H&HS Commission

6. Increase awareness of conservation and energy audit programs

- a) Mention energy audit and conservation programs in City Source newsletter
- b) Suggest helping agencies inform clients to initiate contact with city regarding energy assistance/conservation programs
- c) Suggest a meter check if bill seems abnormally high.

7. Consider increasing the financial benchmarks for the 3 assistance programs.

- a) Use the financial thresholds from Access as a starting point, but allow for increase as allowed by city ordinance
 - b) Consider a higher income threshold for single households, as they bare a disproportionate share of the fixed costs (\$99.25 per bill)
-

