Sunstone Housing Collaborative

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

Issue Date: November 6, 2024

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

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

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

LATE PROPOSALS WILL NOT BE ACCEPTED

INTRODUCTION

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

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

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

Project Goals

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

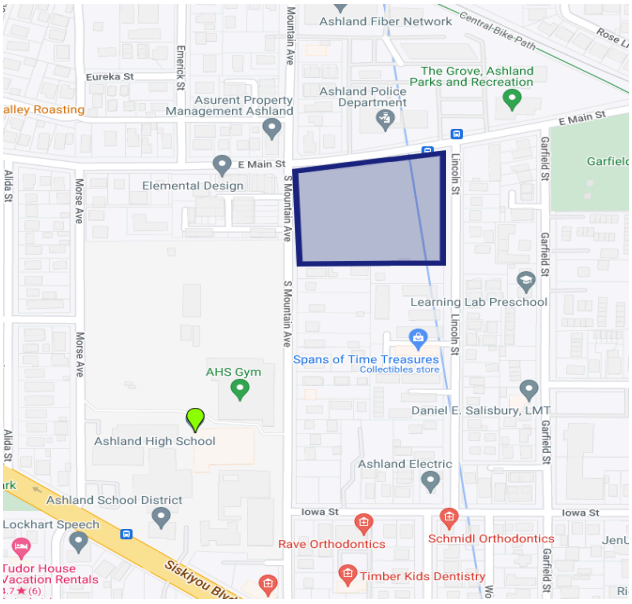
This unique project is intended to serve multiple purposes, including, but not limited to developing ninety units minimum of varying multi-family housing types (apartments, townhouses, cottages), sized from studio to three bedrooms. The Project intends to serve residents with income restrictions and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

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

Project Background

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

SITE INFORMATION



Basic Property Information

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

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

Authorities Having Jurisdiction (AHJ): City of Ashland

Acreage: 4.18 AC (182,081 SF)

Zoning: R-3 (Multiple Family)

Notable Overlay Zones: Hillside lands – slopes >25%

Land

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

Development

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

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

Additional Project Objectives

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

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

SCOPE OF SERVICES

Developer

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

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

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

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

Overview of Required Services

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

Construction Project Manager/General Contractor (CM/GC)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

The GC will be expected to:

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

Additional Requirements

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

Project Architect

Experience and Expertise

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

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

Specific Services Requested

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

A. Programming Phase

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

B. Schematic Design Phase

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

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

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

C. Design Development Phase

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

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

D. Construction and Contract Documents Phase

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

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

E. Construction Administration and Post Completion and Warranty Phase

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

F. Capital Replacement Planning

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

Minimum Requirements

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

Programs" or the Department of Housing and Urban Development's "Limited Denial of Participation" list.

DEVELOPMENT PROCESS

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

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

SUBMISSION REQUIREMENTS

Developer Prequalification Requirements

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

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

Proposal Requirements

Cover Letter:

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

Comparable Project Experience:

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

Firm Background:

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

Key Personnel Experience and Capacity:

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

Inclusionary Practices:

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

Project Approach, including

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

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

Average Cost for General Conditions and Overhead and Profit

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

Administration of Work, Project Scheduling and Coordination

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

References

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

Discussion of Project Goals

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

RFP PROCEDURES

Schedule for Review and Selection

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

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

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

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

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

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

Submission Procedure

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

ASHLAND ATTAINABLE HOUSING PROJECT
[PROPOSER'S NAME]
PROPOSER'S ADDRESS]
[PROPOSER'S TELEPHONE NUMBER]

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

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

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

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

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

Selection Criteria

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

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

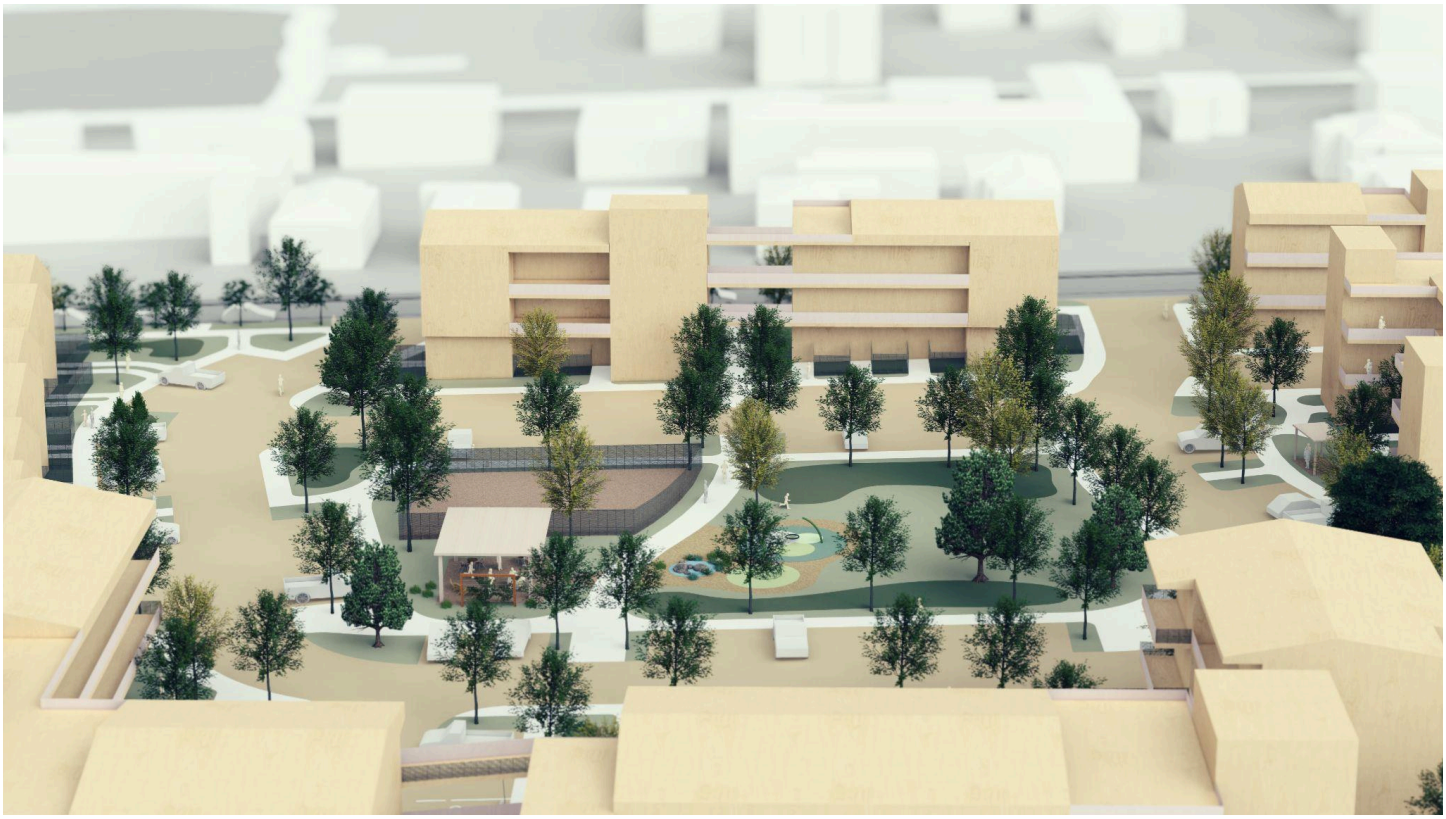
Sunstone will select three finalists, with one recommendation, based on the criteria listed in the selection process. Sunstone will present these finalists at a board meeting to the Ashland School District Board of Directors. The ASD Board of Directors shall vote to approve or deny the selection at the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

Appendix A – (PDF Insert) Master Plan

sunstone
HOUSING COLLABORATIVE

Draft Master Plan

79 Lincoln Street
Ashland, OR 97520



11.04.2024

arkitek
design&architecture

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sunstone
HOUSING COLLABORATIVE

Draft Master Plan

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Attachments:

I. Introduction

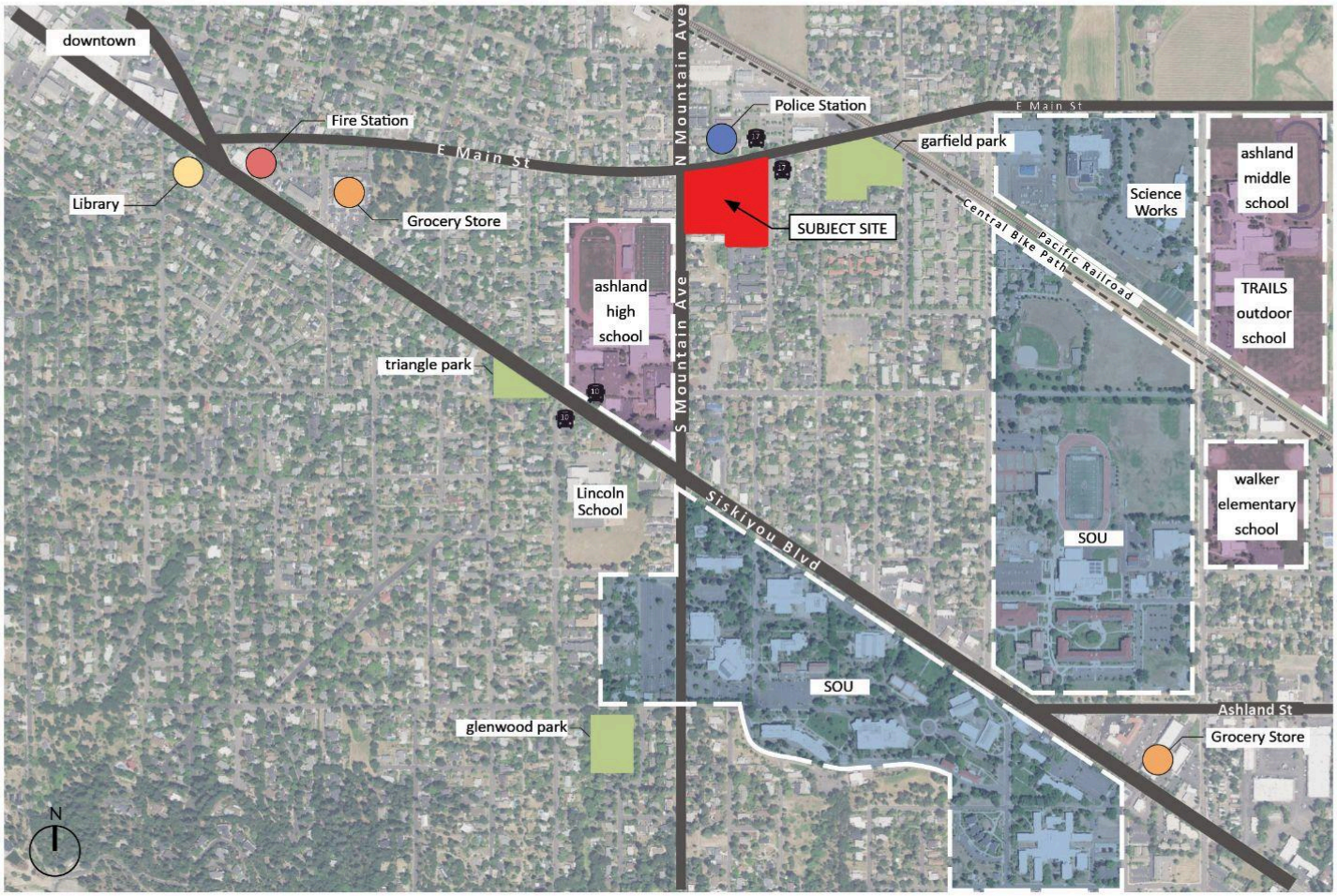
Ashland School District is experiencing a drop in enrollment, and staff is finding it increasingly difficult to afford to live where they work. Availability of affordable housing has become a primary driver in where people choose to live, particularly households with children. The proposed project at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

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

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

II. Site Analysis (See Exhibit A)

Subject Site:	79 Lincoln Street, Ashland OR 97520
Owner:	Ashland School District #5 885 Siskiyou Boulevard Ashland, OR 97520
Map & Tax Lot #:	39-1E-10-1000
Zoning:	R-3 (multiple family)
Overlay Zone:	Hillside lands - slopes >25%
Total Acreage:	4.18 AC (182,081 SF)



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

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

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

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

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

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

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

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

III. Community Needs Assessment: Sunstone User Group Surveys

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

Sunstone Survey #1: Ashland School District Staff

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

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

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

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

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

Sunstone Survey #2: ODHS Disability Services Advisory Council

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

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

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

Sunstone Survey #3: OCDC Participant Families

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

IV. Priorities

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

Most Important:

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

Important:

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

Moderate Importance:

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

Lower Importance

- Onsite Property Management

Least Important Goals

- Market Rate Rentals and/or Ownership

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

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

CEAP Buildings + Energy Section:

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

CEAP Urban Form, Land Use + Transportation Section

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

- Review potential for revised land use codes requiring electric vehicle (EV) charging infrastructure at multifamily developments (Strategy ULT-3-2)
- Consider providing electric charging stations for vehicles, motorized scooters, and wheelchairs on site

■ **Support more climate-ready development and land use (Strategy ULT-4)**
- Review new development regulations as part of the Wildfire Lands Overlay addition to urban growth boundary as the updated overlay may include more urban parts of the city based on recent risk assessments (Strategy ULT-4-3)
- Promote walkable neighborhoods and infill density in community development plans (Strategy ULT-4-2).
    - Specific features to consider: walking, biking, transit, parking management, and climate adaptation features which support affordable housing and do not increase housing costs.

CEAP Natural Systems Section:

■ **Water conservation (Strategy NS-2)**: look for opportunities to reuse water and conserve water on-site
- Provide water-efficient appliances for interior design
- Optimize drip irrigation for landscaping (NS 2-2) and consider opportunities to reuse greywater on site (NS 2-1)

CEAP Consumption + Materials Management Section:

■ **Support sustainable and accessible local production and consumptions (Strategy CM-2):** reduce GHG emissions from shipping in imported goods
- Expand community garden and urban agriculture (Strategy CM-2-2)
    - Consider opportunities for on-site gardening as well as possible School District and/or SOU Sustainability Department partnership where foods grown on campuses are shared with Sunstone housing development

■ **Expand community recycling and composting (Strategy CM-3)**
- If the multi-family recycling ordinance is updated to encourage more diversion (Strategy CM-3-2), consider sufficient recycling space and universal access on site.

VI. Proposed Program

*As feasible without affecting affordability

**As feasible without affecting the total number of target units on site

Housing:

- approximately 91 dwelling units
- Studio & 1 br units
- 2 & 3 br units (highest target percentage)
- **Shop / storage space (bikes, house projects, equipment, toys)
- *In-unit laundry
- Flexible spaces
- Accessible
- Climate-resilient housing
- Innovative building methods and other sustainability upgrades and features should all be explored (LEED, Earth Advantage, solar, stormwater, greywater, local materials, CEAP standards, Rogue Re-Imagined, Energy Trust)

Shared use and site features:

- Child care, with outdoor play area
- Social services
- Property management adjacent to community space
- Event / meeting space
- Co-working space / open copy-print kiosks
- 25% min. Landscaped area (per City of Ashland Municipal Code)
- Community garden
- Integrated outdoor play areas
- Lawn/Open space
- Dog relief zone
- Stormwater detention
- Flexible Pavilion(s)
- Wildlife considerations
- Open outdoor gym
- Clothes lines

Infrastructure:

- Trash / recycle services
- Solar panels
- Electric car charging
- Electric wheelchair charging
- Technology amenities - landscape light sensitive sensor lights, smart locks and access controls (might help with property management)
- Streamlined access to internet and technology

Vehicles:

- Visitor Car Parking
- Resident Car parking (Approx. 1.25 spaces per unit)
    - *Covered
    - Uncovered

- *Garage
- Bike parking
  - Storage facility
  - Covered
- Emergency vehicle access

Above: *Thumbnail view of the attached 'Exhibit D: Site Master Plan'*

VII. Design Overview (See Exhibits B, C, D)

This design overview reflects current goals and priorities, however it is not a complete guide. The general ideas are important, but there is room to adapt and shift with specifics.

Housing Types

Unit sizes and types

- Studio Unit
  - minimum 350 Square feet
  - 1 full bathroom

- One Bedroom Unit
  - Minimum 500 Square Feet
  - 1 full bathroom
- Two Bedroom Unit
  - Minimum 900 Square Feet
  - 1 full bath/1 half bath
- Three Bedroom Unit
  - Minimum 1250 Square Feet
  - 1 full bath/1 half bath

Inclusion and equity in design of units

To create a sense of belonging, a study of housing layouts from various cultures that potential users have come from should be performed and incorporated into the proposed designs. Accessible and adaptable units are to be included at ground level of each building based on community need, not minimum regulatory requirements.

Privacy

Careful consideration of window and door placement is an important aspect of the interior design which creates visual privacy between units and common spaces while emphasizing positive viewsheds. Wall thickness, insulation, and window thickness are to be reviewed thoroughly to reduce sound transfer as much as possible.

Above: *sample visuals of adaptable floor plan and interior wall concept*

Source: Women's Property Initiative Older Women's Housing Project by Studio Bright

Above: *Accessible route from parking to front door and from front door to street*

Accessibility

As part of a comprehensive approach to accessible circulation, well-marked interior and exterior routes will be provided to meet users' mobility needs. A universal design focus will be implemented in parking, site circulation, shared community spaces, interior circulation areas, and within the dwelling unit floor plans to ensure all residents can comfortably and safely access amenities across the site.

Travel Throughout the Site and Beyond

Multi-modal access should be integrated into the site to encourage walking, bike use, and public transit use. There is potential for shared bike parking, a covered bus stop with a bench, a multi-use path with integrated exercise stations, and accessible pet-walking pathways throughout the site.

Per code, the fire truck hose is a maximum of 150' in length and needs to be able to reach each home and building. A U-shaped driveway has been included to accommodate emergency vehicle access so that all homes can be reached during emergencies. The U-shaped driveway can accommodate an aerial fire apparatus and is 24' in width, to allow for both perpendicular parking and for cars to have enough space to back up. Sidewalks and crosswalks have been considered for pedestrian safety.

Wayfinding throughout the site should include intuitive, legible signage and indicators. This can be done by increased text size, translation in multiple languages, and consistent color coding. Buildings are placed on the perimeter of the site to increase safety and sense of ownership within the core of the site, where open space is prioritized for community use.

Parking

The number of parking spaces is not dictated by local or regional codes, but determined by the number of units proposed, with the goal of having approximately 1.25 parking spaces for every unit. Additional user input, consultation with the City community development department, and a traffic engineer is recommended to determine the appropriate number of parking spaces.

Above: *Integrated recreation & play in the landscape*

Community Outdoor Space

Accessible landscaping and recreation areas are to be included throughout the site. These amenities could include shaded pavilions with outdoor lighting features, a fenced space for community gardening, expansive turf lawn for sports and community events, an inclusive play space for children of all ages, exercise and wellness zones, an area for dog use, and a flexible outdoor meeting space adjacent to the community room.

Childcare Facilities

Daycare facilities have specific requirements that will need to be met on this project in order to meet local and state regulations.

Above: *Pergola with lighting for after-work evening assembly, accessible wheelchair space and a few seating options.*

Above: *Private patio and balcony standards*

Personal Outdoor Space

As noted in the current user survey feedback, access to personal outdoor space is valued by many when considering desired housing attributes. A designated enclosed patio/yard for level 1 units allows residents to enjoy a private space to customize their outdoor needs based on their personal interests. Private balconies should be included for units on levels 2 and 3 for the same intended purpose. Patios and balconies are intended to be at minimum 6’ wide and 8’ long to allow for a variety of uses.

Technology

To maximize Wifi usage and access throughout the development, Wifi and Data should be installed during construction, before residents move in. Smart home technology can be considered for ground level universally accessible units. Smart plugs, lighting, and locks can be helpful to residents with disabilities or mobility challenges. Electrically operated doors can also be considered for universally accessible units and common spaces. Along outdoor pathways and parking areas, dark sky lighting should be used with automatic dimming settings to reduce light pollution and energy use, while maintaining a safe and inviting environment at night. Within the landscape, smart irrigation systems should be considered with a controller that can adjust watering times based on weather conditions and with the added capacity to identify watering inefficiencies.

Renewable Energy Sources

To lower electric bills and provide a sustainable source of energy, solar panels should be installed on the roofs of residential buildings. Electric-only power is proposed throughout for heating & cooling, hot water heating, and cooking, without the use of natural gas. The concept of zero energy construction could be considered as a way to lower living costs for residents and increase sustainability on site. Zero energy construction proposes an innovative approach to designing for and constructing enough renewable energy on site to be able to meet all on-site energy needs annually.

Stormwater Management

When planning for stormwater management, several effective techniques can enhance water quality and manage runoff. Rain gardens absorb and filter stormwater, while retention ponds provide storage and wildlife habitat. Water quality swales act as natural drainage channels that filter pollutants, and detention areas temporarily hold water to reduce flooding. Proper soil preparation and application of fire-resilient mulch improve infiltration and moisture retention. Incorporating native plants improves biodiversity and reduces maintenance, while permeable pavers allow water to seep through, decreasing runoff. Filtered vegetated parking strips further treat water as it flows, promoting healthier ecosystems.

Efficient and Mindful Design

Holistic design aims to create integrated, sustainable environments by viewing all project elements—buildings, landscaping, water management, and energy systems—as interconnected parts of a larger ecosystem. A user-centric approach ensures the design supports both social and

environmental goals. Additionally, holistic design considers long-term implications, promoting resilience and adaptability to future climate conditions and community needs.

Sustainable Material Choices

- Using locally sourced materials helps decrease transportation-related pollution because these materials don't have to be transported over long distances. Shorter transportation routes mean less fuel consumption and fewer emissions, contributing to a lower overall environmental impact.
- Sustainable insulation materials to consider include:
    - Cellulose: made from recycled materials and requires minimal energy to produce
    - Sheep's wool: a 100% natural product
    - Cork: harvested from cork oak trees without harming the tree
- Identify building materials, paints, and sealants that are low VOC (volatile organic compounds) and non-toxic.
- Incorporate recycled materials such as recycled concrete or brick to use as a fill material or as a base for hardscaping. Reclaimed wood can be used for building finishes and garden beds.
- Utilize renewable building materials, such as bamboo.
- Permeable pavement could be considered to reduce stormwater runoff and increase percolation on site into the groundwater, thus benefiting the plants on site, reducing the need for detention basins, and reducing the impact that the development will have on the City's stormwater system and the Bear Creek watershed.
- Selecting native, firewise, and climate adapted plant varieties in the landscape will reduce the need for excessive irrigation, improve resilient habitat for local wildlife and pollinator species, and reduce long term maintenance costs.

Sustainable Construction Techniques

- Sediment and erosion control measures shall be well planned and implemented.
- Depending on how funding sources come together, the construction process can be broken up into phases. Each phase would be functional on its own, with the idea that it would be part of the whole plan and system once all phases are completed. Project phasing should be chosen based on site access and existing infrastructure.
- Prefabricated or modular buildings are typically more affordable, and create efficiency in the construction process.
- Establish the proposed finish floor elevations of each structure approximate to existing grade to avoid major site grading. This reduces site disturbance, the amount of fuel and labor required, and reduces the addition or removal of earth that goes into grading a site.

Sustainable building design considerations

- Passive solar design can be created by increasing windows on the south side of the units, and creating an overhang of a specific depth to foster an environment where sunlight helps heat the unit in the winter, while shading from sunlight in the summer to reduce heat gain.
- Solar tube skylights are a strategic way to bring in more natural light into the units, and may reduce electricity usage.

Water conservation techniques

- Select plumbing fixtures that maximize water pressure while limiting water usage.
- Utilize a drip irrigation method for plant watering on site.
- Water conservation in the landscape can be improved through identifying drought tolerant planting materials, reducing the size of traditional lawn areas, and providing adequate soil preparation for landscaped areas to reduce the amount of irrigation plants rely on to survive during summer months.

Waste management and Recycling Solutions

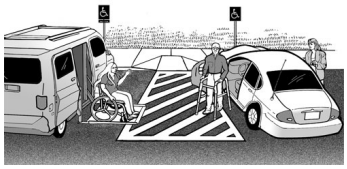
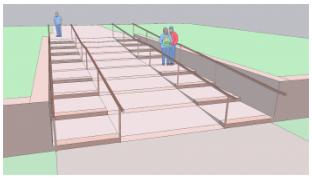
Recology, the local waste management provider, does not have a preference for dumpster versus individual bins. Individual bins should be an option for townhome units, and dumpsters will likely be the primary trash and recycling solution. To promote reuse of materials before recycling, a reuse station could be incorporated into the site, where items like plastic shopping bags, packaging materials, and more could be stored and shared within the community. Additionally, a community-run composting program may be considered either on site or in partnership with an outside organization.

Universal Design

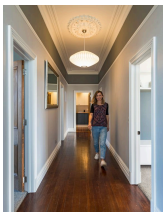
Universal design is an approach for architecture and landscape architecture that creates environments that are accessible and usable for people regardless of their age, ability, cultural background, or status. The resulting design creates spaces that accommodate a wide range of needs, making them universally inclusive. As the proposed Sunstone community is intended to meet the housing needs of a wide range of future residents, adopting a universal design approach to building and site design will help ensure residents are comfortable in both their homes and in accessing the shared site amenities.

Universal design is a priority on level 1, but is not expected to be applied to all levels. The images and parameters included in this section are examples of universal design, not explicit requirements.

Exterior Circulation Design

Parking	Elevation changes	Sidewalks	Entry
			
Min. 96” wide accessible parking spaces with access aisle min. 60” wide, no more than 2.08% slope in all directions with firm, slip resistant surface, and international accessibility symbol sign mounted at least 60” above the ground.	Offer options for different user options. Min. 48” wide ramps and stairs.	Min 6’ Sidewalk width. Smooth surface. color and texture guides for directions.	Minimum of 5’x5’ clear space in front of exterior door. Covered Entry.
image and text source: https://www.ada.gov/topics/parking/	image and text source: theintertwine.org	image source: flickr.com/photos/8232914@N02/8128451184 information source: planning.org	image source: columbusdesignremodeling.com

Interior Circulation Design

Thresholds	Hallways	Doors	Windows
			
Exterior door threshold no greater than .5”. Interior thresholds to be no greater than 0”.	Minimum hallway width of 42”.	Minimum door width of 36”. Hardware that requires minimal effort,lowest cost option is lever handles. To be located 30” - 44” above floor finish grade.	Awning or casement window with crank system to open and close.
image source: udll.com information source:universaldesign.org	image source: homestolove.co information source: simsbuilders.com	image source: kolbewindows.com information source: universaldesign.org INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS	image source: hmota.net information source: hmota.net

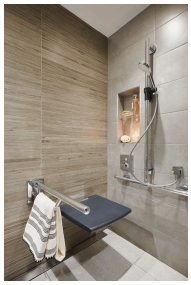
Typical Details

Cabinet Hardware	Counter height
	
pull style hardware with more than 13/16” inner projection and more than 3.2” inner length, and no overhangs.	The top of the counter to be between 28”- 34” above finish floor
image source: amerock.com information source: theknobshop.net	information source: ICC_A117.1-09

Kitchen

Sink - Stove - Oven	Fridge - Freezer
	
Kitchen sink and stove to have a 27” minimum clearance in height finish floor surface, and 30” minimum clearance in width. Built in wall type oven with side swinging door to be installed at 27” above finish floor surface.	under the counter pull-out style fridge and freezer.
image source: conceptmobility.co.us information source: ICC_A117.1-09	image source: homedepot.com

Bathroom

Shower	Toilet	Sink
		
Roll-in shower minimum of 36” wide and 60” long. Folding seat and grab bars included. Shower head fixture doubles as a grab bar.	grab bars on either side. toilet/bidet combo.	27” minimum clearance in height from finish floor surface. facing the sink, 48” long x 30” wide clear floor space.
image source: bathing solutions.co.uk information source: INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS	image source: information source: INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS	image source: information source: INSPECTION CHECKLIST DISABLED ACCESS REGULATIONS

Laundry **HVAC**

Washer - Dryer	Vent	Heat AC Controls
		
Front loading washer and dryer. raised 6-10” to increase ease of use.	wall mounted return vent for ease of changing vent filter. no taller than 42”.	control panel no taller than 42”.
image source: pcrichard.com	image source: americanwoodvents.com/	image source: bedbathandbeyond.com

FireWise best practices in site design

The units on site are accessible by fire trucks and emergency vehicles via the proposed 24 ft driveway that also serves as the fire apparatus road running through the site with access from Lincoln Street. This allows for the 150 ft hose line access to the proposed buildings. In addition to meeting all fire and life safety building codes and requirements for emergency egress, best practices for hardening the site and proposed buildings to be more resilient against the future potential of wildfires will be addressed as part of the design's approach to climate adaptation and risk mitigation. As identified in the City of Ashland's CEAP and noted on the site analysis exhibit, the city faces an increased risk of future wildfires encroaching upon urban areas of town, along with an increase in extreme temperatures and flooding. The proposed site design has been adapted to illustrate currently recommended Firewise fuel mitigation zones within 100' of a built structure. The first five feet around a building structure should be maintained as a non-combustible zone designed with resilient landscape materials such as stone, decomposed granite, hardscaping, and fire-resilient groundcovers and shrubs. Strategic landscape design incorporating more fire-resilient plant material will be provided in the intermediate and extended zones on site with proposed trees located to maintain necessary clearance from building eaves and avoid creating ladder fuel conditions with understory planting.

Above: *Firewise zones example on site, based on CEAP wildfire planning guidance and Firewise USA best practices*

Above: *Fuel zone representations indicated on current site layout for further design implementation.*

References:

- *The Americans with Disabilities Act (ADA)*. https://www.ada.gov/. (n.d.).
- 2017 ICC A117.1 Accessibility Standards https://codes.iccsafe.org/content/icca117-12017P4
- 2010 ADA Standards for Accessible Design https://www.ada.gov/assets/pdfs/2010-design-standards.pdf
- *Ashland Climate and Energy Action Plan*. (2017). City of Ashland. https://ashlandoregon.gov/DocumentCenter/View/1735/Climate-and-Energy-Action-Plan-CEAP-
- *Best Practices for Fire Resistant Landscaping*. Fire Adapted Ashland. (n.d.). https://ashlandoregon.gov/919/Best-Practices-for-Fire-Resistant-Landsc
- National Fire Protection Association. (n.d.). *Preparing Homes for Wildfire*. Firewise USA . https://www.nfpa.org/education-and-research/wildfire/firewise-usa#preparing-homes-for-wildfire
- https://www.earthadvantage.org/climate-friendly-housing/building-certifications.html
- Oregon Fire Code, 2022 ED. https://codes.iccsafe.org/content/ORFC2022P1
- https://www.usgbc.org/leed/rating-systems/neighborhood-development
- Rogue Valley Stormwater Quality Design Manual https://www.rvss-or.gov/sites/default/files/uploads/rvsqdm-revised-july-2024.pdf

Appendix B – Demographic Data

Demographic Data

Useful demographic and household data has been included below. This information is based on independent research and US Census data and should be validated by the developer, as needed.

AFFORDABLE HOUSING GUIDELINES								
Income Limits by Family Size: $/year								
May 2024 - May 2025								
Number of Persons in Family/Anticipated Unit Size								
% AMI	1 Person	2 Persons	3 Persons	4 Persons	5	6	7	8
	Studio/1BR	Studio/1BR/ 2BR	1BR/2BR	2BR/3BR	3BR/4BR			
Extremely Low Income (30%)	$ 18,450	$ 21,100	$ 25,820	$ 31,200	$ 36,580	$ 41,960	$ 47,340	$ 52,728
Low Income (50%)	$ 30,750	$ 35,150	$ 39,550	$ 43,900	$ 47,450	$ 50,950	$ 54,450	$ 57,958
Income at 60% of Median	$ 36,400	$ 41,600	$ 46,800	$ 52,000	$ 56,200	$ 60,300	$ 64,500	$ 68,658
Moderate Income (80%)	$ 49,200	$ 56,200	$ 63,250	$ 70,250	$ 75,900	$ 81,500	$ 87,150	$ 92,758
Median Income (100%)	$ 61,450	$ 70,200	$ 79,000	$ 87,800	$ 94,800	$ 101,800	$ 108,850	$ 115,908
Income at 120% of Median	$ 73,750	$ 84,300	$ 94,800	$ 105,350	$ 113,800	$ 122,200	$ 130,650	$ 139,108

Appendix C – Finance Data

SOURCES & USES OF FINANCING		Residential	Commercial/ Community	TOTAL
SOURCES				
LIHTC Equity				
Permanent Loan				
Public Source A (TBD)				
Public Source B (TBD)				
Developer Equity				
Total Sources		-	-	-
USES				
Acquisition				-
Construction				
Soft Costs				
Financing and Other Costs				
Total Uses		-		-