Ashland School Board
School Board Work Session
Thursday, September 24, 2026 6:30 PM

District Office
885 Siskiyou Blvd
Ashland, Oregon 97520

Agenda

1. Call to Order / Roll Check

Presenter: Board Chair Russell Hatch

2. Adoption or Adjustment of Agenda ***(At this time, Board members are provided the opportunity to amend the agenda)***

Presenter: Board Chair Russell Hatch

3. City Tax Exemption Initiative Review 10 min. **2**

Presenter: Director of Business Services Sherry Ely

4. Board Goals 40 min.

Presenter: Superintendent Joseph Hattrick

5. Housing Discussion 45 min. **3**

Presenter: Matt Edlen

6. Transformation 10 min.

Presenter: Superintendent Joseph Hattrick

7. Board Learning 10 min.

Presenter: Board Chair Russell Hatch

8. Adjourn

Presenter: Board Chair Russell Hatch

ASHLAND PUBLIC SCHOOLS

JACKSON COUNTY SCHOOL DISTRICT #5

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KRISTA GUTIERREZ PARIS
Director, Student Services

September 24, 2026

RE: City of Ashland Request to Exempt Low Income Housing from Property Taxes

I reached out to Angela Stuhr, Jackson County Assessor to get some property tax information, specific to Ashland School District, on the request from the City of Ashland.

Regarding the two properties noted in the memo the Board received from Linda Reid, Housing Program Manager, Angela was able to give me the following information:

> The Starthistle property is currently 90% exempt – so removing the remaining 10% would only reduce our tax collection by $357.35 and our YAAL collection by $110.81;
>
> The Rogue Ridge Property is currently "special assessed" – changing to a full exemption would reduce our tax collection by $6,457.39 and our YAAL collection by $2,002.36.

For the property taxes that go into the General Fund – we would not see a decrease overall in our annual revenue because the State School Fund would offset what we don't collect.

For future developments – it would depend on what classification they are in. If they fall into the same category as the Starthistle property – the impact will be minimal. If they fall into the Rogue Ridge category – the amount to the YAAL could be impacted more significantly.

I think the consideration for the Board is whether low income housing would make Ashland more affordable for some families which could potentially benefit the District from an increased ADM perspective – there may be some value to that.

As it stands now – with the two properties noted above - the impact is not significant.

Respectfully submitted,

Sherry Ely

ASHLAND SCHOOL DISTRICT 885 SISKIYOU BOULEVARD ASHLAND, OREGON 97520 541-482-2811 FAX 541-482-2185

ASHLAND ATTAINABLE HOUSING

Project Update

Ashland School Board

September 2026



Conceptual rendering

Site Program and Funding Phases



FIRST FUNDED PHASE

Affordable Rental + ECE

84 rental homes and the early childhood education center

2027 OHCS SUBMISSION TARGET

HOMEOWNERSHIP PHASE

11 CLT Homes

Separate application and closing path

2028 OHCS FUNDING TARGET

Conceptual plan. Final boundaries and building layout remain subject to design development.

Conceptual site plan provided by the project team

How State Affordable Housing Funding Works

01

Rolling entry

ORCA accepts projects throughout the year. Readiness determines when a project advances.

02

Project review

OHCS reviews impact, costs, financing, design readiness, and policy requirements.

03

Resource assignment

Housing Stability Council may issue a conditional LOI when resources are available.

04

Closing

Final commitment follows detailed underwriting, permits, investor commitments, and final agreements.

CURRENT FUNDING CONTEXT

OHCS reports that nearly all 2025-27 gap subsidy is committed and that new projects should expect a wait. The 2027 submission target positions Ashland for the next funding cycle but does not guarantee an award date.

Source: Oregon Housing and Community Services ORCA guidance and pipeline update

OHCS Review Phases

Prequalification	COMPLETED	Team eligibility and legal standing
Intake	COMPLETED	Project scope, site, unit mix, financing plan, and schedule
Impact Assessment	CURRENT PHASE	Design, community impact, initial proforma, and partners
Conditional Approval	DECISION POINT	Housing Stability Council review and conditional letter of intent
Financial Eligibility	REVIEW PHASE	Detailed underwriting, due diligence, plans, and financing
Commitment	DECISION POINT	OHCS confirms final resource commitment, subject to closing conditions

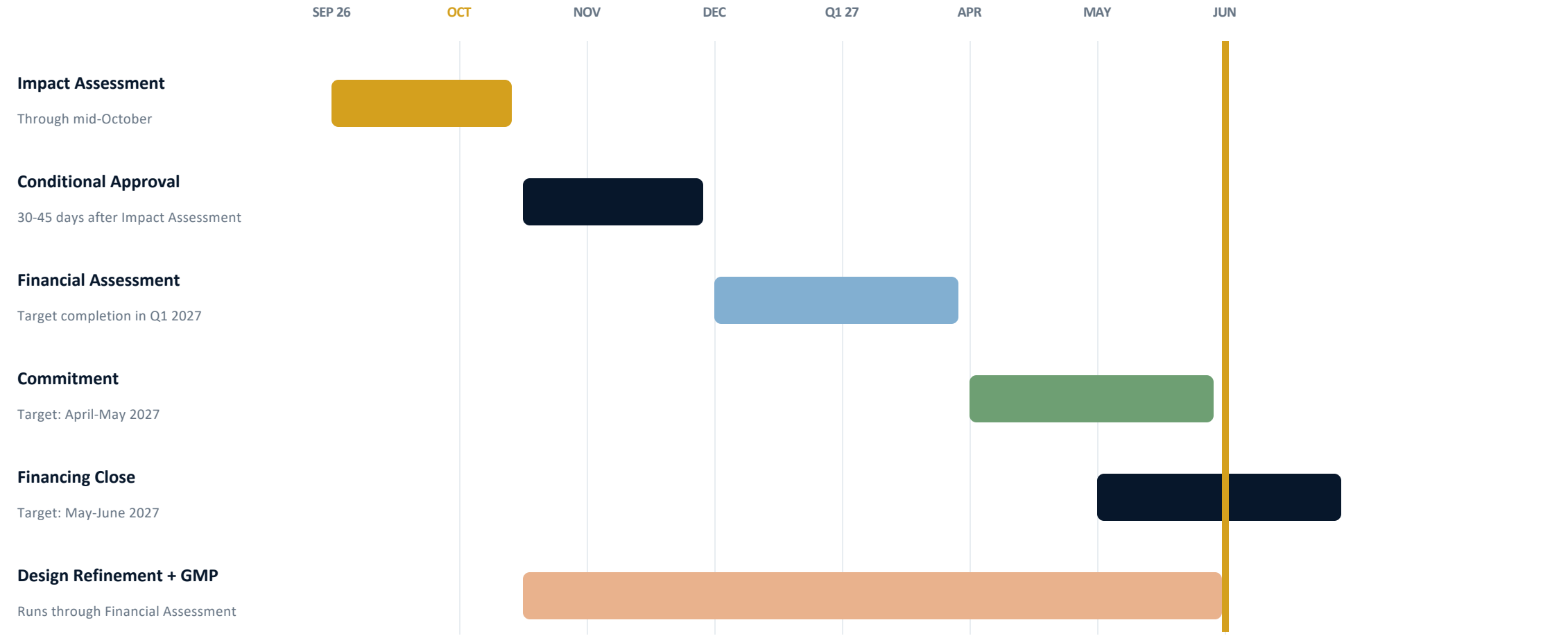
CLOSING REQUIREMENTS

Final plans and permits, final budget and GMP, lender and investor commitments, and executed site-control agreements.

Title, survey, environmental review, insurance, organizational documents, legal opinions, affordability documents, and all reservation conditions.

Source: OHCS “How to Apply” guidance, accessed September 2026

OHCS and Project Timeline



EARLIEST CONSTRUCTION START

June 2027

Target schedule. OHCS review, resource assignment, and closing timing remain outside project control.

Agreement Sequence and Current Status

01	**ENA**	COMPLETED	Established exclusive negotiations and the feasibility work program.
02	**Term Sheet**	MID-OCTOBER	Documents the principal deal terms agreed by the District and Edlen & Co.
03	**“Evidence of Site Control”**	MID-OCTOBER	Establishes site control and a defined control period. Preserves exclusivity through the state funding process.
04	**DDA + Ground Lease**	BEGIN DRAFTING	Draft the final governing documents from the signed term sheet. Complete them before financing close and construction.

Agreement status based on project records as of September 2026

Discussion Point 1: Evidence of Site Control (OHCS)

IMMEDIATE BOARD CONSIDERATION

Required During Impact Assessment

OHCS requires evidence of site control during Impact Assessment. Accepted forms include ownership, an executed purchase agreement or lease, or an option to purchase or lease.

CURRENT OHCS EXPECTATION

Based on recent OHCS application experience, an ENA alone is not expected to satisfy the site-control documentation required for Impact Assessment.

WHY AN OPTION

- Continues the exclusivity already established by the ENA.
- Covers the state review and funding period before definitive agreements are complete.
- Ends when the DDA and ground lease take effect.

The option does not finalize the DDA or ground lease terms.

REQUESTED BOARD CONSIDERATION

Determine Appropriate Form of Agreement

The option establishes site control and a defined control period through the funding cycle. The DDA and ground lease supersede it when executed.

Discussion Point 2: Community Land Trust

FUTURE DISCUSSION

NOT PART OF TODAY'S REQUEST

Future Homeownership Program

The 11-home CLT phase will follow a separate 2028 OHCS application. Current construction costs and interest rates exceed the homeownership funding identified to date.

01

Separate 2028 Application

The CLT phase follows its own funding and closing process.

02

Funding Gap

The team must resolve the gap between development costs and available homeownership resources.

03

Future Land Structure

Trusted Homes counsel recommends fee-simple conveyance of the defined CLT parcel.

04

District Coordination

Edlen & Co. remains the District's primary contact across the full project.

The team will refine funding feasibility and proposed land terms before returning to the Board.

REQUESTED BOARD CONSIDERATION

Consideration to continue to pursue home ownership or convert use to affordable rental.

Next Steps

1	**Complete the Term Sheet**	Ready for signature. Documents the principal deal terms agreed by both parties.
2	**Determine Necessary Agreement to Meet State's Required "Evidence of Site Control"**	Establishes site control and the control period required for the funding process.
3	**Advance the DDA and Ground Lease**	Proceed from the signed term sheet and complete before financing close and construction.
4	**Continue the OHCS Process**	Advance Impact Assessment, underwriting, resource commitment, and closing.