

July School Board Meeting

Monday, July 17, 2023 Doors open at 6:15pm

District Administration Office, 88834 Territorial Road, Elmira, Oregon 97437

1. Call to Order: Public - 6:30pm

2. Flag Salute

3. Oath of Office

3.A. Kathleen Pizzola: Position 1 for a 4-year term

3.B. Lisa McCann: Position 5 for a 4-year term

4. Receive the Community Planning Committee Recommendation **Presenter:** Scott Rose

5. **Public Comment: The Fern Ridge School Board encourages public input. A person wanting to provide public comment will need to complete and submit an Intent to Speak form to the Board secretary by 1:00 pm on the day of the board meeting.**

Public comment is limited to this place on the agenda not to exceed a total of 30 minutes for all commenters. A person giving public comment is limited to an established time limit of (3) three minutes. While speakers may, during public meetings, offer objective criticism of school operations and programs, the Board will not hear personal complaints concerning district personnel nor against any person connected with the school system.

Please state your name and address. If speaking for an organization, state the name of the organization. The Board reserves the right to refer the matter to the administration.

6. Monthly Items:

6.A. Approval of Minutes - Board Action

7. Reports:

7.A. Chartwells 2022-2023 Report **Presenter:** Director Bo Gottfried

7.B. Superintendent's Report

8. Discussion Items

8.A. August School Board Retreat

8.B. Oregon School Board Association Summer Conference

8.C. House Bill 2753 Stipend for School Board Directors - Board Action

9. Annual Organization Appointments for School Year 2023-2024 - Resolution #23-24/01 and Election of Board Chair and Vice Chair - Board Action

9.A. Annual Organization Appointments for the 2023-2024 School Year - Resolution #23-24/01

9.B. Election of Board Chair and Vice Chair

10. Personnel

10.A. Licensed Employees Resignations/New Hires/Transfers/Other - Board Action
Hiring of Ralph Davis, 1.0 FTE Teacher at Fern Ridge Middle School, effective August 23, 2023.
Hiring of Courtney Roberts, 1.0 FTE Counselor at Elmira Elementary School, effective August 23, 2023.
Resignation of Ruth Larson, 1.0 FTE Teacher at Fern Ridge Middle School, effective June 19, 2023.

10.B. Non-Licensed Personnel Report

11. Late Items/Closing Comments

12. Adjournment



Fern Ridge School District

Provide excellence for every student so that each will reach their greatest potential

Capital Facility Investments Community Planning Committee FINAL Recommendation – 7/10/23



Facilitated and Compiled by:



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SUPPORTING DATA

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Meeting #2 package – 4/18/23

Meeting #3 package – 5/9/23

2021 population forecast (Lane County)

2023 financial analysis (Piper Sandler)

EXECUTIVE SUMMARY

The Fern Ridge School District established a long-range facility planning committee to look at capital needs across the district. The charge of the process was as follows:

End product

- A recommended scope of capital issues to be addressed by the school district
- A recommended timeline to address these issues
- A recommended tax rate cap for capital funding

Timelines (2023-24)

Feb-Mar: District Needs Evaluation

April-May: Community Process

June: Community Outreach

Sept-Oct: Polling and Plan Refinement

November: Board Action

December: OSCIM Grant

Dec-Jan: POTENTIAL Collateral Development

Feb-May: POTENTIAL Informational Campaign

Qualitative Results

Improvements to facilities and sites that:

- Positively impact the student experience
- Make prudent fiscal investments
- Engage community in the schools



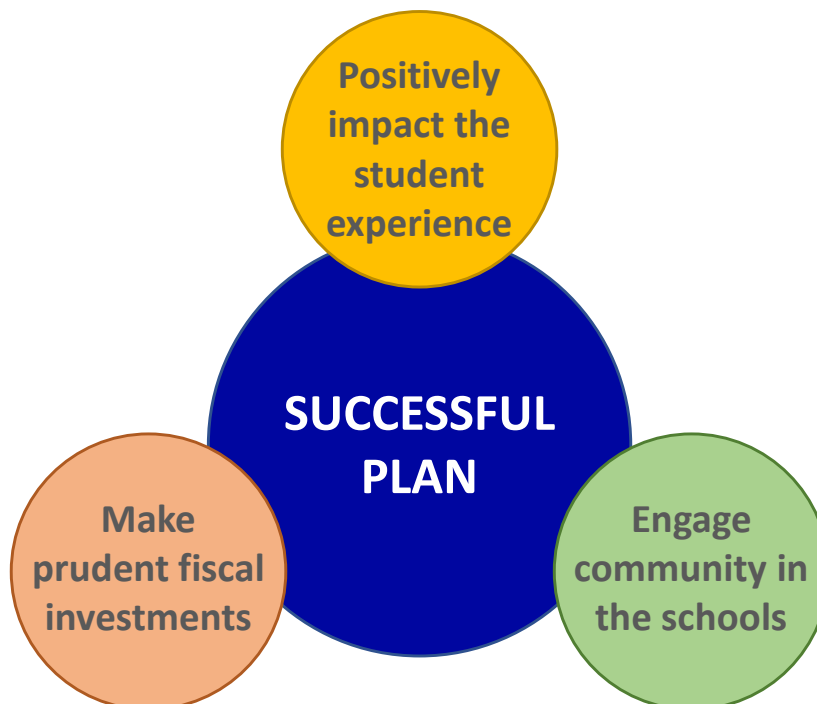
VALUES

The values exhibited by the committee were to make informed recommendations based on the available data rather than assumptions. This included prior assessments, tours of each site, and their own observations. These recommendations also had to align with the district's mission reiterated here:

Fern Ridge School District Mission

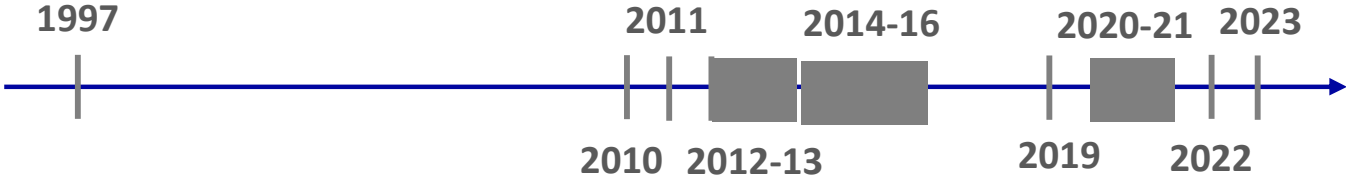
- **Relationships-** A supportive and safe school environment that values diversity, and in which all students and adults feel welcomed and respected.
- **Rigor-** Maintain high expectations and promote academic excellence through challenging curriculum, as well as instruction that builds critical thinking skills.
- **Relevance-** Helping students connect and apply their education to the world of today and tomorrow.

These drivers for Fern ridge School District influenced the committee's metrics for success in the planning process and set the three qualitative measurements:



Fern Ridge School District
Capital Facility Investments
Community Planning Committee Recommendation

PROCESS



THE CAPITAL PROCESS TIMELINE

The original school buildings were constructed in the 1930’s and the district added neighboring towns in the 1940’s until the district we know now was consolidated in 1960. Since that time, the high school and middle school were also constructed as well as re-construction at Veneta due to fires in 1972, 1974, and 1989. However, the most direct influence to the current bond planning started in 1997 with a bond issue that had a maturity in 2012.

The district levied \$15 million bonds ahead of that maturity in 2010 and 2011 – both defeated.

In 2012-13, they hired out for professional assessments and community-based planning. A larger, \$26.67 million bond was passed in 2014 and included 3 years of construction, resulting in:

- Replacement to Elmira Elementary School
- New Gymnasium at Elmira High School
- New Cafeteria and Added Classrooms at Veneta Elementary
- New Safe and Secure Entry at Fern Ridge Middle School
- Capital Repairs District-Wide

While the district continues to invest in small-scale capital repairs at all buildings, athletics garners a lot of interest in our community from both the youth and adult populations. As such, a parent-led, athletics-based bond for \$7 million was forwarded to voters in 2019 but was defeated. While popular, it was not universally supported as it, alone, did not address the needs of every student.

Updated assessments and planning efforts were completed in 2020-21 as part of a new State Grant program. These were conducted by the same assessor as in 2012 with R&C Management Group. Due to COVID-19, the district elected not to proceed immediately with a bond issue to the voters.

In 2022, the district refinanced their existing bond debt.

In Fall of 2022, the Fern Ridge School Board directed that a plan be generated to establish a bond package to present to voters with a potential time frame of May 2024. R&C Management Group was re-hired and a planning committee established with a mix of community and staff members.

R&C Management Group updated prior assessments and interviewed staff for remaining capital needs at each of the sites.

The Community Planning Committee received this information and met multiple times to review data and break into small groups to collaborate on strategies for prioritizing needs. This recommendation comes from the Community Planning Committee and is the culmination of their efforts.

PROCESS

MEETINGS THROUGHOUT

Internal Staff Work Sessions, Needs Identification, and Goal Setting Meetings (4):

2/16/23 3/2/23 3/16/23 3/28/23

Community-Based Committee Meetings (4):

4/11/23 4/18/23 5/9/23 5/31/23

Coordination Meetings: As needed since October 2022

THANK YOU TO OUR MEMBERS (Community and Staff)

Cassie Purkey-Babcock	Ashley Foltz	Michelle Marshall
Katy Miller	Tory Macklin	Olivia Johnson
Sarah Wartenbee	Mark Boren	Eric Carman
Billie Perrier	Matt Michel	Lisa Leatham
Maya Trout	Angie Hill	Rick Gardner
Jeff Thiessen	Andrea Shepherd	Tiffany Davis
James Storey	Brittany Ota	Rilke Klingsporn
Sara Varozza	Erik Carlstrom	Gary Carpenter

CONSULTANTS

R&C Management Group (Planning, budgets, and facilitation)
Piper Sandler & Company (Financial)

COMMUNITY PLANNING COMMITTEE
PLAN RECOMMENDATION

SCOPE	BUDGET
Tier 1: Invest in science grades 6-12, safety, mechanical systems, restrooms, urgent parking areas, and a replacement grandstand structure	\$8.8 million
Tier 2: Renovated student program spaces, next tier parking areas, and building exteriors	\$2.0 million
Tier 3: Energy usage and site development	\$1.4 million
BASE PLAN	\$12.2 million
Replace track, add synthetic field, address support buildings, and locate grandstand by track as part of athletic campus investment (pending OSCIM Grant)	\$6 million
OPTIONAL EXPANDED PLAN	\$18.2 million

RELATED ISSUES

- Provide balanced messaging perspective on all projects, all grades, and all students – de-emphasize just athletics or singular programs.
- Size of athletic investment will depend on whether the OSCIM grant is received and will be messaged as such.
- With the old rotted grandstand demolished, the district will purchase portable aluminum bleachers for use during athletic events on that field. The bond issue will include replacement of the grandstand in its current location with a fixed aluminum structure. If the district receives matching state OSCIM grants ahead of the bond, then the new grandstand will instead be located by the track and the track replaced with a 400-meter track, synthetic field, and support structures for concessions, restrooms, and storage. The portable aluminum bleachers will be used at other Fern Ridge fields.

FUNDING

- Issuance of a General Obligation bond for \$12.2 Million with a desired cap of no larger than \$2.20 combined total bond tax rate (prior and new).
- Application for a State OSCIM Grant for \$6 Million (reflects 2024 increase).
- Leveraging other potential grants for seismic, energy, etc. as may be available.

TIMING

- Apply for OSCIM Grant on 12/15/23.
- Issue the bond in May 2024.
- Complete Science Renovations over summer 2025.
- Replace grandstand by Fall 2025.

Fern Ridge School District
 Capital Facility Investments
 Community Planning Committee Recommendation

EXISTING FACILITY NEEDS

TIER ONE

WORK TYPE	SITE	DESCRIPTION	Project Budget Total	Running Budget
EDUCATION	Elmira High	Science wing (16-20) is dated, needing equipment, finish, modernization upgrade (19-21 is the lab) - light renovation	\$780,000	\$780,000
EDUCATION	Fern Ridge MS	Science Wing (12-15 plus greenhouse) needs updating / altered for modern instruction/STEM/ fab. Note: corner of building looks to be settling (cracked wallboard, doors sticking in frames, ceiling grid buckling/sagging).	\$1,267,500	\$2,048,000
MECHANICAL	Elmira ES	Heating and Ventilation System needs a retro-commissioning to address heat gain, balancing, and air flow. Most notable issues at commons of classrooms 9-12, door pressures/whistling at many interior, and pull pressure at exterior vestibules.	\$78,000	\$2,126,000
MECHANICAL	Elmira High	Tech closet off Room 35 - very warm - add AC.	\$32,500	\$2,159,000
MECHANICAL	Elmira High	Heating and Ventilation System - needs replacement controls throughout with a new digital control system (current is Trane - antiquated and unreliable). New needs to have universal user graphic interface (looking at potentially changing out burners from diesel to propane or heat pump installation to deliver 140 to boiler	\$1,222,000	\$3,381,000
MECHANICAL	Fern Ridge MS	Heating and Ventilation System - needs replacement controls throughout with a new digital control system (current is Trane - antiquated and unreliable). New system needs to have universal user graphic interface. Also needs replacement of (3) RTU's and conversion of fuel source	\$851,500	\$4,233,000
PARKING	Elmira High	Strip down to gravel and re-do most of main lot and south drive	\$975,000	\$5,208,000
PARKING	Veneta ES	Main (original) parking lot is in failure - remove down to gravel subgrade and re-pave.	\$910,000	\$6,118,000
RESTROOMS	All Sites	Restrooms are in need of remodeling and repairs at multiple locations - most notably at Veneta Elementary and Elmira High School - rehab including replacement of fixtures and finishes and increased air flow.	\$856,000	\$6,974,000
SAFETY	Elmira High	Exterior doors off Classrooms 1 and hall warped and rusted - pull and replace	\$31,000	\$7,005,000
SAFETY	Fern Ridge MS	Stand Alone Covered Shelter- rotting and too small and asphalt sloping. Remove summer 2023 (with grandstand demolition). Ongoing conversation about options to activate an outdoor area for students - potentially repurpose and activate space off gym and commons (wallball, hoops, covered area, seating) - FIGURE LUMP SUM CAP	\$250,000	\$7,255,000
SAFETY	Fern Ridge MS	Intercom / phone system unreliable (static, drop offs, outdated parts) - Replace	\$299,000	\$7,554,000
SAFETY	Fern Ridge MS	All 3 interior ramps are too steep per code - do narrow extension and paired stair.	\$156,000	\$7,710,000
SAFETY	Veneta ES	Rubber gym flooring in failure: remove and replace with new rubber flooring (product data; transitions; vendor walk)	\$115,000	\$7,825,000
STRUCTURE	Elmira High	Grandstand Replacement: Grandstand is condemned (demolition SUMMER 2023 and replacing with aluminum bleachers); Build new covered for 600 people home side (press box and storage) and move new aluminum bleachers over for visitors (have reached out to vendor to confirm budget - significant IT, timing, scoreboard, etc. - See Cottage Grove). At track or at current location depending on overall bond.	\$975,000	\$8,800,000

EXISTING FACILITY NEEDS

TIER TWO

WORK TYPE	SITE	DESCRIPTION	Project Budget Total	Running Budget
EDUCATION	Elmira High	Weight room upgrades partnered with equipment donor (finishes and ventilation)	\$205,000	\$205,000
EDUCATION	Fern Ridge MS	Old Home Economics Room (22) - Renovate to maker space (gut and renovate as maker space - concrete floor with large tables for light construction)	\$194,000	\$399,000
EDUCATION	Fern Ridge MS	Band and Choir Rooms - replace practice room floors, add sound proofing, and sound system for recording/playback	\$65,000	\$464,000
EDUCATION	Fern Ridge MS	SLC Classroom (24) - full upgrade of finishes, equipment, and casework.	\$195,000	\$659,000
PARKING	Elmira High	Seal cracks and add chip coat to rear lot	\$78,000	\$737,000
PARKING	Fern Ridge MS	MS - parent drop off and pick up route (backs up onto territorial) - expand cuing, improve traffic flow though reconfiguration	\$249,000	\$986,000
PARKING	Fern Ridge MS	Parking lot and rear drive showing some signs of cracking - needs crack sealer and chip coating before failure. (lowest use)	\$117,000	\$1,103,000
PARKING	Veneta ES	Expand parking lot to adjacent or rear portions - 40 stalls	\$897,000	\$2,000,000

TIER THREE

WORK TYPE	SITE	DESCRIPTION	Project Budget Total	Running Budget
ENERGY	Veneta ES	Replace all lighting with LED	\$487,500	\$487,500
SITE	Elmira ES	Perimeter not completely fenced, nor interior play zones - all areas open all the time. Some north fencing currently damaged. Provide 6' chainlike at perimeter with fire department approved lane gates	\$123,500	\$611,000
SITE	Elmira ES	Kindergarten area playground needs expansion - add 2 structures plus safety surfacing	\$260,000	\$871,000
SITE	Elmira ES	Add walking track around field - assume 1/4 mile wood chip	\$117,000	\$988,000
SITE	Elmira ES	Drainage poor at the back of the building / and fire lane - floods regularly - add trench drains along zone between track and building and provide drywells at either end. No perimeter drains - just surface swales - cow tongues daylight near foundation (day-to-day drains)	\$184,000	\$1,172,000
SITE	Elmira ES	Water staining on siding down low - water hardness issue. Water softening will eliminate the benefits to the grounds. Recommend modifying irrigation heads / spray patterns to minimize staining and then re-paint.	\$65,000	\$1,237,000
SITE	Veneta ES	Asphalt intersection at playground - lots of flooding, puddle 20' across, impacts access to play structures, freezing over - hazard, water to subgrade - pea gravel was replaced by wood chips 2 years ago.	\$162,500	\$1,400,000

TOTAL TIERS 1-3: \$12.2 MILLION

EXISTING FACILITY NEEDS

EXPANDED ATHLETIC OPTION

WORK TYPE	SITE	DESCRIPTION	Project Budget Total	Running Budget
ATHLETICS	Elmira High	Track Replacement (upgrade from 440 to 400 meter) with storm drainage and synthetic turf football field ; Add loose equipment to track project (all field events, hurdles, mats, pole vaults (\$30k quote), scoreboard, etc.)	\$4,070,000	\$4,070,000
ATHLETICS	Elmira High	New Restroom/concessions building for track and football field area (1,500 sf) (pre-fab structure plus utilities)	\$1,075,000	\$5,145,000
ATHLETICS	Elmira High	Replace deteriorated support out-buildings (about 9,000 sf)	\$855,000	\$6,000,000

PENDING OSCIM GRANT – TOTAL PLAN: \$18.2 MILLION

EXISTING FACILITY NEEDS

OTHER IDENTIFIED NEEDS BEING ADDRESSED INTERNALLY

WORK TYPE	SITE	DESCRIPTION	Project Budget Total	Running Budget
ENVELOPE	Bus Barn	Replace built-up roof at back	\$23,400	\$23,400
ENVELOPE	Bus Barn	Roll-up garage doors (3) damaged and binding - replace	\$78,000	\$101,400
SAFETY	Bus Barn	Barb wire on fencing - replace with angled extensions and no-climb	\$104,000	\$205,400
SAFETY	Bus Barn	Add access controls	\$23,400	\$228,800
SAFETY	Bus Barn	Add intercom / all call system	\$15,444	\$244,244
SAFETY	Bus Barn	Limited surveillance - expand for full exterior coverage	\$19,500	\$263,744
SAFETY	Bus Barn	Unsafe access conditions along south building side - add sidewalk along full length flush with stoops	\$15,600	\$279,344
SITE	Bus Barn	Parking lot - grade and pave gravel lot	\$731,250	\$1,010,594
ENVELOPE	District Offices	Repair water damage in basement along street-side wall	\$15,600	\$1,026,194
FINISH	District Offices	10% (estimate) ceiling tiles stained / damaged - replace	\$7,800	\$1,033,994
SAFETY	District Offices	Add access controls	\$23,400	\$1,057,394
SAFETY	District Offices	Add intercom / all call system	\$15,444	\$1,072,838
SAFETY	Elmira High	Asbestos: Popcorn ceiling in Media Center and Classroom 3 (put back 2x2 glue-up tile); VAT flooring in 5 classrooms (remove and put back linoleum) ESSER APPROVED	\$273,000	\$1,345,838
EDUCATION	Elmira High	Develop/improve 1 baseball / softball (movable mound) & 1 soccer field at FRMS site - assume synthetic.	\$5,200,000	\$6,545,838
FINISH	Elmira High	Gymnasium Floor (main) - sand to wood and re-seal and stripe. (Internal)	\$49,400	\$6,595,238
FINISH	Elmira High	Bad carpet - 4 classrooms (internal)	\$62,400	\$6,657,638
FINISH	Elmira High	10% (estimate) ceiling tiles stained / damaged - replace (internal)	\$91,000	\$6,748,638
	Elmira High	Renovate restroom building off courtyard into unisex restrooms (SUMMER 2023)	\$0	\$6,748,638
SITE	Elmira High	Sanitary sewer system replacement (20 years old) - clean out gravel section from "hazard silt" - retrofit pumps and internal units and replace pre-treatment (AEQ certified because of environmental regulations) - internal	\$1,300,000	\$8,048,638
FINISH	Fern Ridge MS	Carpet bad in 3 classrooms and horseshoe hall around media center - look to carpet tiles. (ESSER)	\$46,800	\$8,095,438
FINISH	Fern Ridge MS	10% (estimate) ceiling tiles stained / damaged - replace (internal)	\$52,000	\$8,147,438
ENVELOPE	Maintenance Bui	Evidence of roof leaking - replace roof	\$52,000	\$8,199,438
LIGHTS	Maintenance Bui	Poor task lighting at rear work areas	\$26,000	\$8,225,438
SAFETY	Maintenance Bui	Add access controls	\$23,400	\$8,248,838
SAFETY	Maintenance Bui	Add intercom / all call system	\$15,444	\$8,264,282
SAFETY	Maintenance Bui	Limited surveillance - expand for full exterior coverage	\$19,500	\$8,283,782
SITE	Maintenance Bui	Poor site drainage issues along street face – appears to overflow.	\$15,600	\$8,299,382
ENVELOPE	Veneta ES	Windows fogging (broken seals) on original instructional wing - remove and replace with new (Internal)	\$234,000	\$8,533,382
ENVELOPE	Veneta ES	Masonry paint failing (center classroom pod) - prep and re-paint whole school (INTERNAL)	\$39,000	\$8,572,382
FINISH	Veneta ES	8 classrooms (Main Hall) with bad carpet (unseaming, holes, major staining, not holding up) - look at carpet tiles (ESSER)	\$124,800	\$8,697,182
FINISH	Veneta ES	10% (estimate) ceiling tiles stained / damaged - replace (internal)	\$32,500	\$8,729,682
MECH	Veneta ES	The heating system in the rooms up on the old stage area above the gym works erratically (extreme hot and cold). Add a mini-split to the isolated area (INTERNAL)	\$58,500	\$8,788,182
ENVELOPE	Veneta ES	Replace roofing over primary wing (2023 SUMMER)	\$0	\$8,788,182
ENVELOPE	Veneta ES	Rotting wood siding on original instructional wing (2023 SUMMER)	\$0	\$8,788,182

ASPIRATIONAL IMAGERY



Embrace systems and spaces that foster creativity and curiosity for development of trade skills related to STEAM and CTE programming in potential MAKER SPACES



Utilize furniture with storage underneath, easy access to power, and generic/durable tabletops for work on most any subject.

ASPIRATIONAL IMAGERY



Create spaces with lots of presentation areas enabling student-led work and rolling furniture to easily get it out of the way for larger projects. Think pops of color.



ASPIRATIONAL IMAGERY



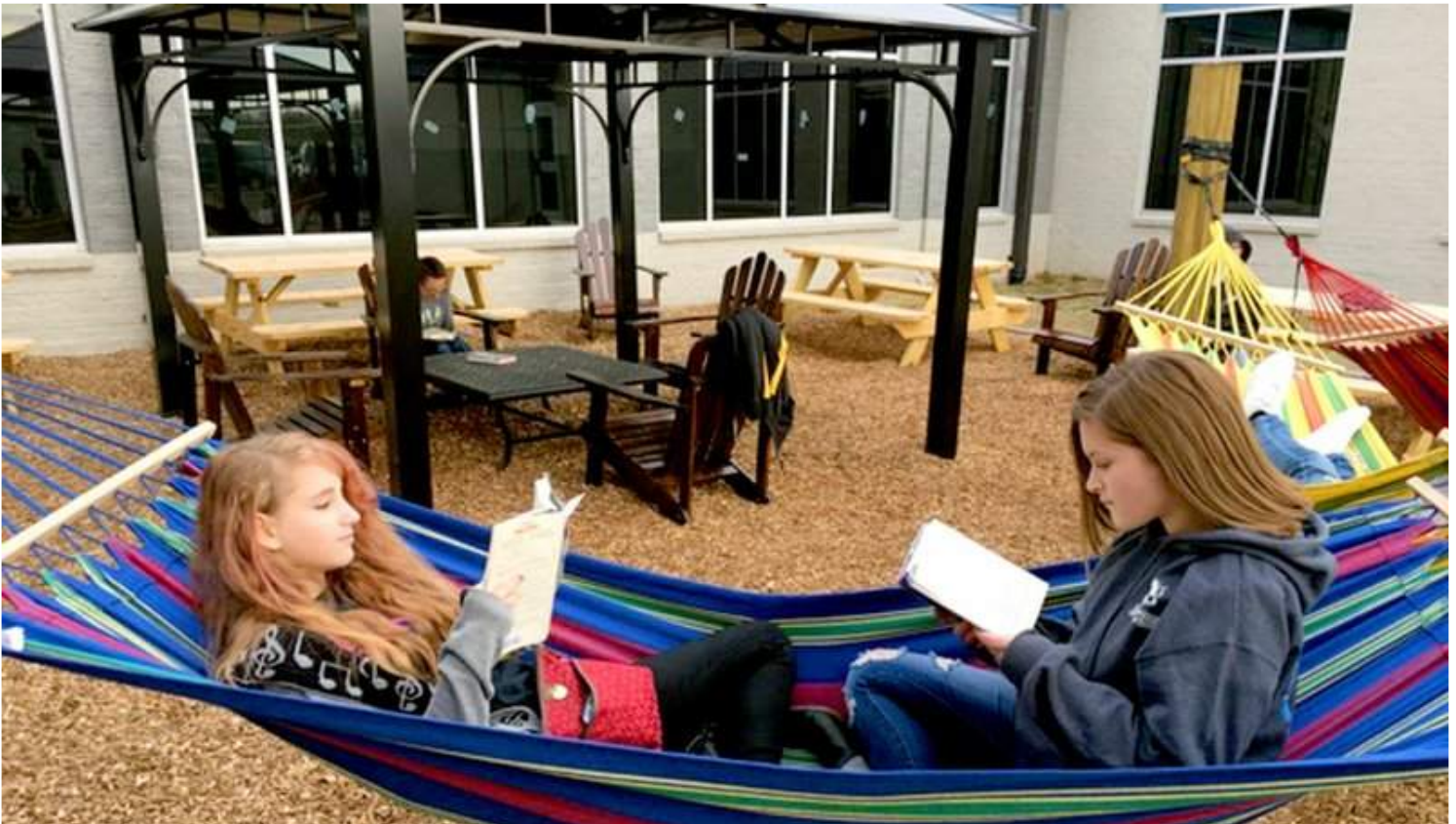
Stimulate the learning environment with natural light and access to the outdoors – keep spaces open and easily transitioned to different stations. Think about 3-4 tasks that can happen simultaneously as achieved through a variety of furnishings.



ASPIRATIONAL IMAGERY



For the middle school outdoor space, look at structured physical options that are engaging and can withstand the weather.



Balance this with social spaces both covered and in the open.

ASPIRATIONAL IMAGERY



Natural elements like boulders and logs and a mix of hardscape and softscape can give a break from the rigid interior.



ASPIRATIONAL IMAGERY

CONCEPT DEVELOPMENT WITH OSCIM GRANT





Fern Ridge School District

Provide excellence for every student so that each will reach their greatest potential

Capital Facility Investments Community Planning Committee Recommendation



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Fern Ridge School District

Provide excellence for every student so that each will reach their greatest potential

Capital Facility Investments Community Planning Committee Recommendation



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Fern Ridge School District 2023 School Bond Planning Committee

MEETING PACKAGE #1 APRIL 11, 2023, 6-8pm Fern Ridge Middle School (Chromebook Lab)



Fern Ridge School District

2023 School Bond Planning Committee

MEETING #1 AGENDA

Welcome and Introductions
Tour (Middle School)
Goals for Process
How We Got Here
District Data Sharing
Large Group Discussion on Big Issues
Next Steps

NEXT MEETINGS

Meeting #2- April 18th (Location: Elmira High School Library)
Small group plan generation

Meeting #3- May 9th (Location: Veneta Elementary Library)
Narrow the plans to 2 and begin to refine

Meeting #4- May 30th (Location: Elmira Elementary Library)
Plan comparison - further refinement and recommendation of a single plan

Fern Ridge School District

2023 School Bond Planning Committee

Goals for Process

End product

A recommended scope of capital issues to be addressed by the school district

A recommended timeline to address these issues

A recommended tax rate cap for capital funding

Timelines (2023-24)

Feb-Mar: District Needs Evaluation

April-May: Community Process

June: Community Outreach

Sept-Oct: Polling and Plan Refinement

November: Board Action

December: OSCIM Grant

Dec-Jan: POTENTIAL Collateral Development

Feb-May: POTENTIAL Informational Campaign

Qualitative Results

Improvements to facilities and sites that:

- Positively impact the student experience
- Make prudent fiscal investments
- Engage community in the schools

Fern Ridge School District

2023 School Bond Planning Committee

How We Got Here

- | | |
|---------|---|
| 1997 | Passed Bond |
| 2010 | \$15 million bond narrowly defeated |
| 2011 | \$15 million bond defeated with 60% “No” |
| 2012-13 | Hired for a full assessment of all buildings and a community planning process |
| 2014 | \$26.67 million bond passed and included:
Replacement to Elmira Elementary School
New gymnasium at Elmira High School
Veneta - New Cafeteria & Classrooms
Capital Repairs District-Wide |
| 2019 | \$7M, parent-lead, athletics-based bond defeated |
| 2020-21 | Hired for a full assessment of all buildings and a community planning process (TAP Grant) |
| 2022 | Refinanced current bond debt |
| 2023 | District needs confirmation with staff and community-based planning process update |

Fern Ridge School District

2023 School Bond Planning Committee

DATA – Our Sites

SITE	SIZE	CAPACITY*	ENROLLED
Elmira Elementary	48,190 SF	282	298
Veneta Elementary	44,407 SF	398	361
Fern Ridge Middle School	69,642 SF	511	291
Elmira High School	113,669 SF	720	396
District Services (3 bldgs.)	15,824 SF	N/A	N/A

*Capacity assumes 22 students per class (grades K-3) and 28 students per class (4-12). At Middle and High School levels, this assumes an 83% utilization rate for planning periods.

ENROLLMENT PROJECTION SUMMARY: A combination of the 2008-13 recession and the COVID period has slowed growth from the Lane County 2008 projections report. While growth will remain slow and steady, it is not anticipated to exceed the district’s current student capacity. New programs and aging structures are a separate consideration.

Fern Ridge School District 2023 School Bond Planning Committee

DATA – Our Sites

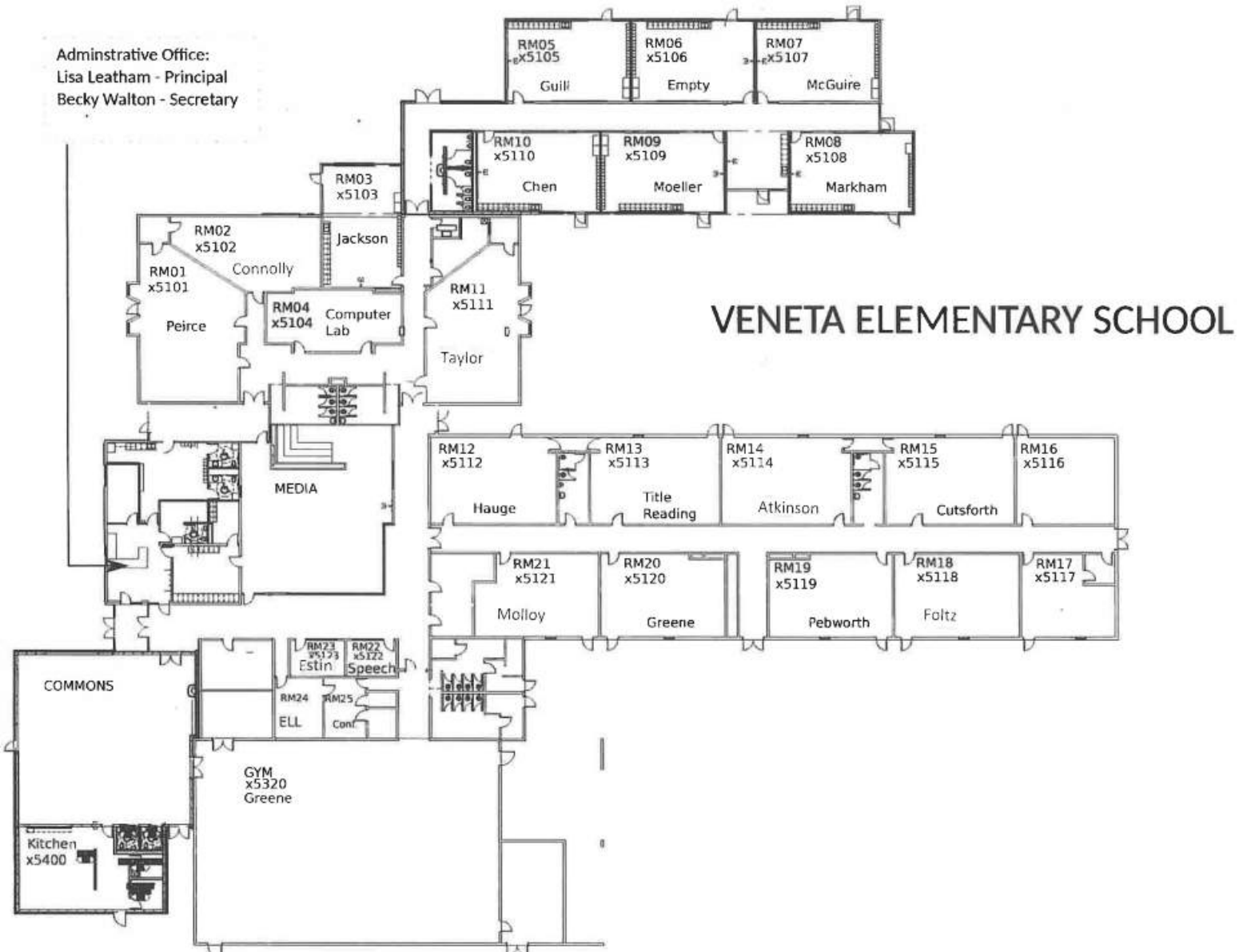
2022-2023



Elmira Elementary School
Fern Ridge School District

Fern Ridge School District 2023 School Bond Planning Committee

DATA – Our Sites



Fern Ridge School District 2023 School Bond Planning Committee

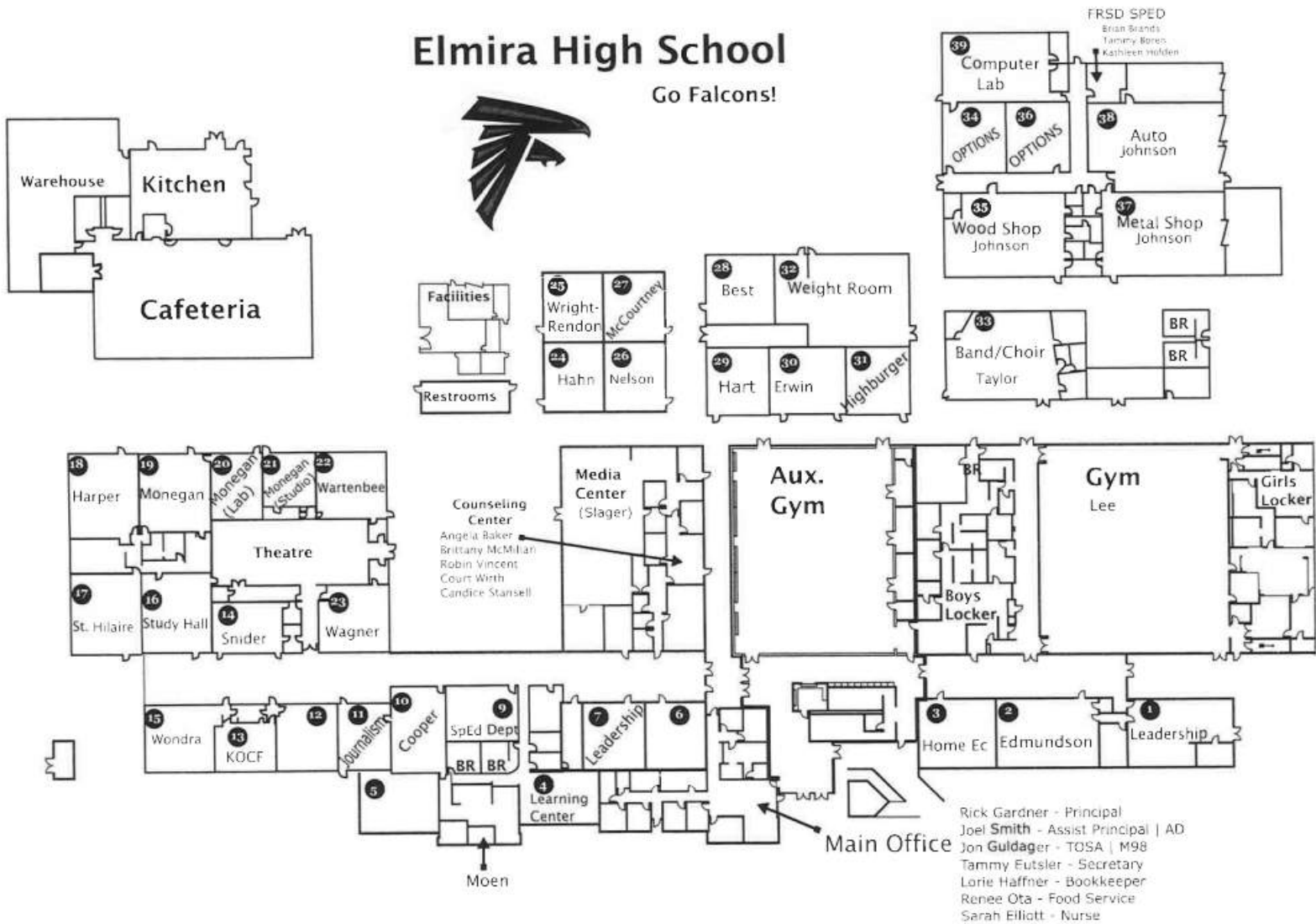
DATA – Our Sites

FERN RIDGE MIDDLE SCHOOL



Fern Ridge School District 2023 School Bond Planning Committee

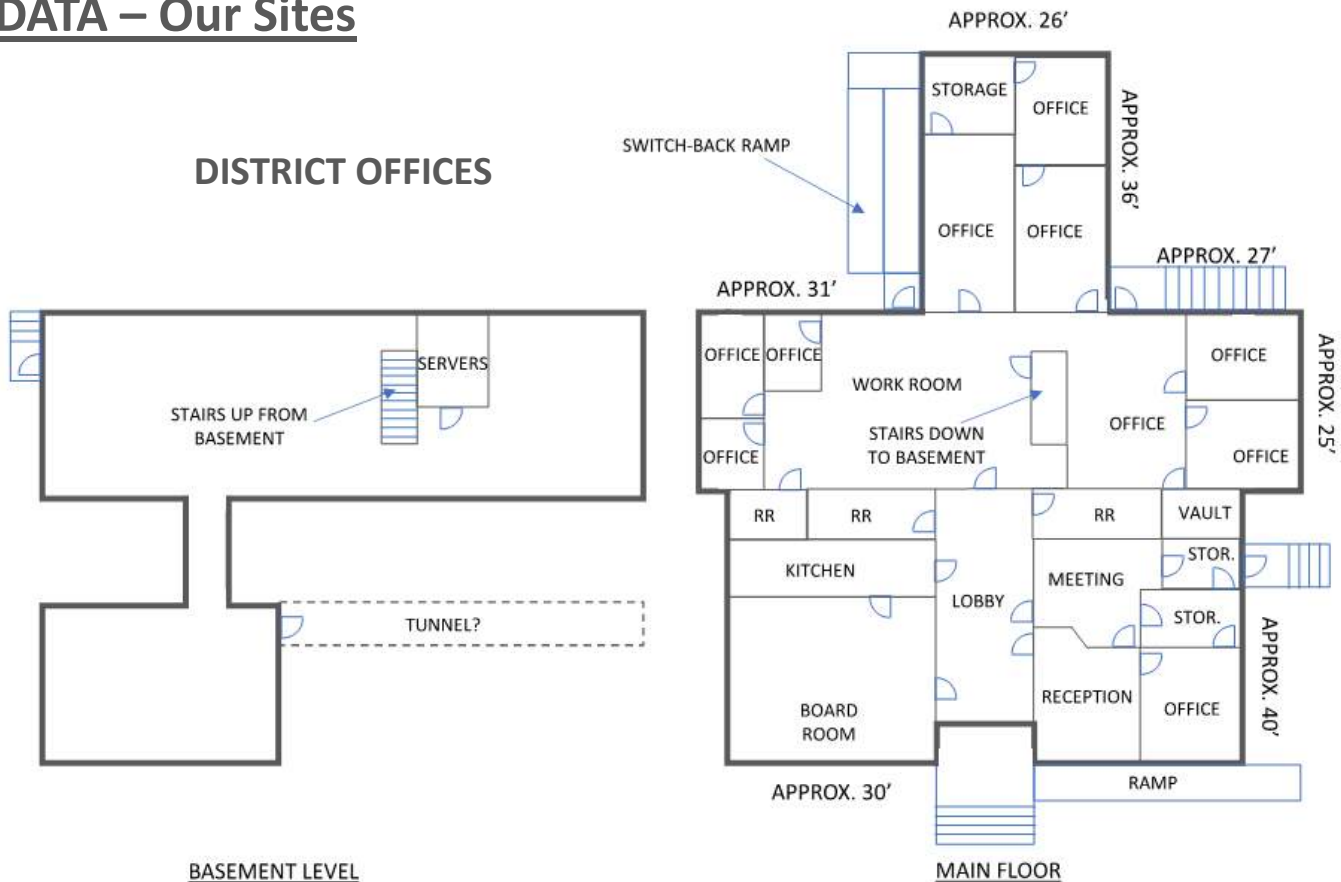
DATA – Our Sites



Fern Ridge School District 2023 School Bond Planning Committee

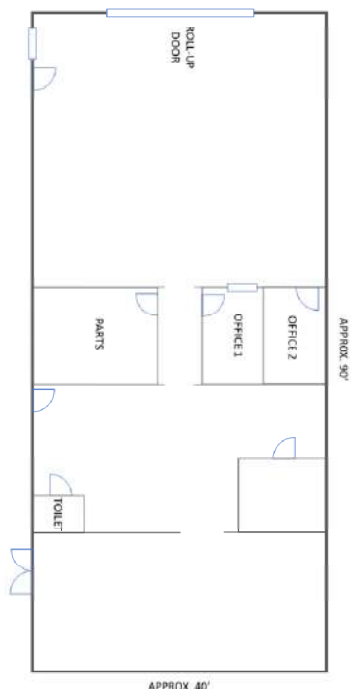
DATA – Our Sites

DISTRICT OFFICES

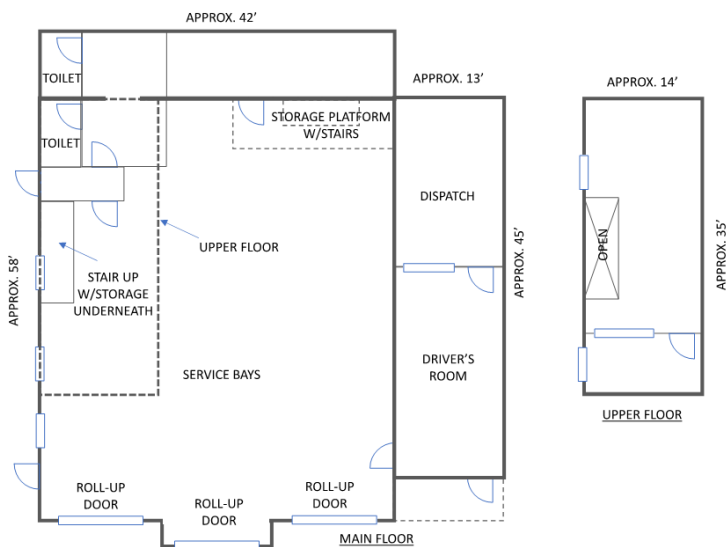


BASEMENT LEVEL

MAIN FLOOR



**MAINTENANCE
BUILDING**



**TRANSPORTATION
BUILDING**

Fern Ridge School District 2023 School Bond Planning Committee

DATA – General Fund, Bond Funds, & Grants

General Fund

This is your permanent tax rate that you pay every year for schools. These funds go directly to the state, and formulas are used to re-distribute a “per pupil” amount back to school districts. These are to cover operating expenses.

Between 80 and 85% of these funds cover wages for all staff (teachers, aids, specialists, administrators, custodians, cooks, etc.). The remaining funds are used for utilities, supplies, program support materials, and maintenance.

Maintenance is basic services to be performed during the normal life of the system but do not include replacement or expansion of the system unless additional funds are available through other cost reductions.

Bond Funds

These are levied periodically within a local area through an election to allow school districts to sell general obligation bonds. Districts levy taxes to local taxpayers to cover those costs over a period of time (typically anywhere from 10-40 years depending on the amount and rate).

These can only be used for capital construction and for equipment related to that capital work. Capital work is the replacement or expansion of existing building or site systems and the construction of new systems to support increased enrollment or the change of programs.

Grants

Grants are funds that are typically competitive and based on a limited pool of resources and do not have to be paid back. Grants have drastically reduced in recent years.

There are a number of program-based grants that the district applies for and receives annually that must be used for staff and materials for those specific programs (not construction).

The State of Oregon has a \$4 million matching grant (OSCIM) that is applied for in July and December for November and May elections respectively. If awarded, a district must pass a bond of at least equal value to receive the grant. It can be used for the same things as bond funds.

The state also offers seismic rehabilitation grants up to \$2.5 Million.

Energy grants are available through Energy Trust of Oregon, some local utilities, and Senate Bill 1149 funds and typically cover 10-20% of the cost for energy improvement measures.

A few private equipment grants are available for technology and Career Technical Education but typically are less than \$25k. ¹¹

Fern Ridge School District 2023 School Bond Planning Committee

DATA – Identified Needs at Each Site

Budgets

Provided with each project are recommended budgets based on information provided by trades professionals or based on recent bids for similar work in other districts and are based on a cost per square foot or similar measurement.

These are NOT estimates, which are provided by contractors for a very specific design.

Construction budgets are the likely cost for the contractor to building the project.

Development budgets are all the costs that go into the preparation and management of the work and include items like:

Architect

Engineer

Professional Services (survey, geotech, hazardous, etc.)

Construction Management

Permits & Agency Fees

Furniture (as applicable)

Equipment

Contingency

Fern Ridge School District

2023 School Bond Planning Committee

DATA – Identified Needs at Each Site

Elmira Elementary School

PRIORITY	WORK TYPE	DESCRIPTION	Recommended Construction Budget	Recommended Development Budget	Project Budget Total
	EDUCATION	Kindergarten area playground needs expansion - add 2 structures plus safety surfacing	\$180,000	\$54,000	\$234,000
	EDUCATION	Add walking track around field - assume 1/4 mile wood chip	\$90,000	\$27,000	\$117,000
	MECH	Heating and Ventilation System needs a retro-commissioning to address heat gain, balancing, and air flow. Most notable issues at commons of classrooms 9-12, door pressures/whistling at many interior, and pull pressure at exterior vestibules.	\$60,000	\$18,000	\$78,000
	SAFETY	Perimeter not completely fenced, nor interior play zones - all areas open all the time. Some north fencing currently damaged. Provide 6' chainlike at perimeter with fire department approved lane gates	\$80,000	\$24,000	\$104,000
	SITE	Drainage poor at the back of the building / and fire lane - floods regularly - add trench drains along zone between track and building and provide drywells at either end. No perimeter drains - just surface swales - cow tongues daylight near foundation (day-to-day drains)	\$160,000	\$48,000	\$208,000
	ENVELOPE	Water staining on siding down low - water hardness issue. Water softening will eliminate the benefits to the grounds. Recommend modifying irrigation heads / spray patterns to minimize staining and then re-paint.	\$50,000	\$15,000	\$65,000

Veneta Elementary School

PRIORITY	WORK TYPE	DESCRIPTION	Recommended Construction Budget	Recommended Development Budget	Project Budget Total
	ENVELOPE	Masonry paint failing (center classroom pod) - prep and re-paint whole school (INTERNAL)	\$30,000	\$9,000	\$39,000
	ENVELOPE	Windows fogging (broken seals) on original instructional wing - remove and replace with new	\$180,000	\$54,000	\$234,000
	FINISH	Rubber gym flooring in failure: remove and replace with new rubber flooring (product data; transitions; vendor walk)	\$80,000	\$24,000	\$104,000
	FINISH	8 classrooms (Main Hall) with bad carpet (unseaming, holes, major staining, not holding up) - look at carpet tiles (ESSER)	\$96,000	\$28,800	\$124,800
	FINISH	10% (estimate) ceiling tiles stained / damaged - replace (internal)	\$25,000	\$7,500	\$32,500
	LIGHTS	Replace all lighting with LED	\$370,000	\$111,000	\$481,000
	SITE	Asphalt intersection at playground - lots of flooding, puddle 20' across, impacts access to play structures, freezing over - hazard, water to subgrade - pea gravel was replaced by wood chips 2 years ago.	\$125,000	\$37,500	\$162,500
	MECH	The heating system in the rooms up on the old stage area above the gym works erratically (extreme hot and cold). Add a mini-split to the isolated area (INTERNAL)	\$45,000	\$13,500	\$58,500
	RENO	The bathrooms by the computer lab need complete rehab including replacement of fixtures and finishes and increased air flow. Girls restroom toilets not working often	\$60,000	\$18,000	\$78,000
	SITE	Main (original) parking lot is in failure - remove down to gravel subgrade and re-pave.	\$750,000	\$225,000	\$975,000
	SITE	Expand parking lot to adjacent or rear portions - 40 stalls	\$700,000	\$210,000	\$910,000
		Replace roofing over primary wing (2023 SUMMER)		\$0	\$0
		Rotting wood siding on original instructional wing (2023 SUMMER)		\$0	\$0

Fern Ridge School District

2023 School Bond Planning Committee

DATA – Identified Needs at Each Site

Fern Ridge Middle School

PRIORITY	WORK TYPE	DESCRIPTION	Recommended Construction Budget	Recommended Development Budget	Project Budget Total
	EDUCATION	Science Wing (12-15 plus greenhouse) needs updating / altered for modern instruction/STEM/ fab. Note: corner of building looks to be settling (cracked wallboard, doors sticking in frames, ceiling grid buckling/sagging).	\$1,125,000	\$337,500	\$1,462,500
	EDUCATION	Old Home Economics Room (22) - Renovate to maker space (gut and renovate as maker space - concrete floor with large tables for light construction)	\$150,000	\$45,000	\$195,000
	EDUCATION	Band and Choir Rooms - replace practice room floors, add sound proofing, and sound system for recording/playback	\$50,000	\$15,000	\$65,000
	EDUCATION	SLC Classroom (24) - full upgrade of finishes, equipment, and casework.	\$150,000	\$45,000	\$195,000
	FINISH	Carpet bad in 3 classrooms and horseshoe hall around media center - look to carpet tiles. (ESSER)	\$36,000	\$10,800	\$46,800
	FINISH	10% (estimate) ceiling tiles stained / damaged - replace (internal)	\$40,000	\$12,000	\$52,000
	MECH	Heating and Ventilation System - needs replacement controls throughout with a new digital control system (current is Trane - antiquated and unreliable). New system needs to have universal user graphic interface. Also needs replacement of (3) RTU's.	\$680,000	\$204,000	\$884,000
	SAFETY	Intercom / phone system unreliable (static, drop offs, outdated parts) - Replace	\$229,819	\$68,946	\$298,764
	SITE	MS - parent drop off and pick up route (backs up onto territorial) - expand cuing, improve traffic flow though reconfiguration	\$750,000	\$225,000	\$975,000
	SAFETY	All 3 interior ramps are too steep per code - do narrow extension and paired stair.	\$120,000	\$36,000	\$156,000
	SITE	Parking lot and rear drive showing some signs of cracking - needs crack sealer and chip coating before failure. (lowest use)	\$90,000	\$27,000	\$117,000
		Stand Alone Covered Shelter- rotting and too small and asphalt sloping. Remove summer 2023 (with grandstand demolition). Ongoing conversation about options to activate an outdoor area for students - potentially repurpose and activate space off gym and commons (wallball, hoops, covered area, seating)			TBD

Fern Ridge School District

2023 School Bond Planning Committee

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PRIORITY	WORK TYPE	DESCRIPTION	Recommended Construction Budget	Recommended Development Budget	Project Budget Total
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	EDUCATION	Grandstand Replacement: Grandstand is condemned (demolition SUMMER 2023 and replacing with aluminum bleachers); Build new covered for 600 people home side (press box and storage) and move new aluminum bleachers over for visitors (have reached out to vendor to confirm budget - significant IT, timing, scoreboard, etc. - See Cottage Grove). At track or at current location depending on overall bond.	\$700,000	\$210,000	\$910,000
	EDUCATION	New Restroom/concessions building for track and football field area (1,500 sf) (plug and play style pre-fab structure)	\$675,000	\$202,500	\$877,500
	EDUCATION	Science wing (16-20) is dated, needing equipment, finish, modernization upgrade (19-21 is the lab)	\$1,350,000	\$405,000	\$1,755,000
	EDUCATION	Develop/improve 1 baseball / softball (movable mound) & 1 soccer field at FRMS site - assume synthetic.	\$4,000,000	\$1,200,000	\$5,200,000
	EDUCATION	Replace both batting cage buildings (3800 sf each)	\$480,000	\$144,000	\$624,000
	FINISH	Gymnasium Floor (main) - sand to wood and re-seal and stripe. (Internal)	\$38,000	\$11,400	\$49,400
	FINISH	Bad carpet - 4 classrooms (internal)	\$48,000	\$14,400	\$62,400
	FINISH	10% (estimate) ceiling tiles stained / damaged - replace (internal)	\$70,000	\$21,000	\$91,000
	MECH	Heating and Ventilation System - needs replacement controls throughout with a new digital control system (current is Trane - antiquated and unreliable). New needs to have universal user graphic interface (looking at potentially changing out burners from diesel to propane or heat pump installation to deliver 140 to boiler (conversion - internal))	\$950,000	\$285,000	\$1,235,000
	MECH	Tech closet off Room 35 - very warm - add AC.	\$25,000	\$7,500	\$32,500
	SAFETY	Exterior doors off Classrooms 1 and hall warped and rusted - pull and replace	\$24,000	\$7,200	\$31,200
	SAFETY	Asbestos: Popcorn ceiling in Media Center and Classroom 3 (put back 2x2 glue-up tile); VAT flooring in 5 classrooms (remove and put back linoleum) (ESSER option?)	\$210,000	\$63,000	\$273,000
	SITE	Strip down to gravel and re-do main lot and south drive	\$750,000	\$225,000	\$975,000
	SITE	Seal cracks and add chip coat to rear lot (internal??)	\$60,000	\$18,000	\$78,000
	SITE	Replace baseball and Football storage sheds (80 and 700 sf respectively)	\$30,000	\$9,000	\$39,000
	SITE	Replace high Jump and Pole Vault pad storage units - structurally failing and not water-tight.	\$30,000	\$9,000	\$39,000
		Renovate restroom building off courtyard into unisex restrooms (SUMMER 2023)		\$0	\$0
	EDUCATION	Weight room upgrades partnered with equipment donor			TBD
	SITE	Sanitary sewer system replacement (20 years old) - clean out gravel section from "hazard silt" - retrofit pumps and internal units and replace pre-treatment (AEQ certified because of environmental regulations)	\$1,000,000	\$300,000	\$1,300,000

Fern Ridge School District

2023 School Bond Planning Committee

DATA – Identified Needs at Each Site

District Services (assumed internal and not on a bond)

PRIORITY	WORK TYPE	SITE	DESCRIPTION	Recommended Construction Budget	Recommended Development Budget	Project Budget Total
	ENVELOPE	Bus Barn	Replace built-up roof at back	\$18,000	\$5,400	\$23,400
	ENVELOPE	Bus Barn	Roll-up garage doors (3) damaged and binding - replace	\$60,000	\$18,000	\$78,000
	SAFETY	Bus Barn	Barb wire on fencing - replace with angled extensions and no-climb	\$80,000	\$24,000	\$104,000
	SAFETY	Bus Barn	Add access controls	\$18,000	\$5,400	\$23,400
	SAFETY	Bus Barn	Add intercom / all call system	\$11,880	\$3,564	\$15,444
	SAFETY	Bus Barn	Limited surveillance - expand for full exterior coverage	\$15,000	\$4,500	\$19,500
	SAFETY	Bus Barn	Unsafe access conditions along south building side - add sidewalk along full length flush with stoops	\$12,000	\$3,600	\$15,600
	SITE	Bus Barn	Parking lot - grade and pave gravel lot	\$562,500	\$168,750	\$731,250
	ENVELOPE	District Offices	Repair water damage in basement along street-side wall	\$12,000	\$3,600	\$15,600
	FINISH	District Offices	10% (estimate) ceiling tiles stained / damaged - replace	\$6,000	\$1,800	\$7,800
	SAFETY	District Offices	Add access controls	\$18,000	\$5,400	\$23,400
	SAFETY	District Offices	Add intercom / all call system	\$11,880	\$3,564	\$15,444
	ENVELOPE	Maintenance Building	Evidence of roof leaking - replace roof	\$40,000	\$12,000	\$52,000
	LIGHTS	Maintenance Building	Poor task lighting at rear work areas	\$20,000	\$6,000	\$26,000
	SAFETY	Maintenance Building	Add access controls	\$18,000	\$5,400	\$23,400
	SAFETY	Maintenance Building	Add intercom / all call system	\$11,880	\$3,564	\$15,444
	SAFETY	Maintenance Building	Limited surveillance - expand for full exterior coverage	\$15,000	\$4,500	\$19,500
	SITE	Maintenance Building	Poor site drainage issues along street face – appears to overflow.	\$12,000	\$3,600	\$15,600

Fern Ridge School District

2023 School Bond Planning Committee

DATA – Bond Costs

The 2014 Bond was passed at an estimated tax rate to voters of \$2.20 / thousand dollars of assessed value.

Growth since that time has reduced that rate slightly.

The district re-financed the bond in 2022 to reduce the debt by \$1 million by shortening the maturity and raising the rate back to \$2.20.

A bond to maintain the tax rate at the original \$2.20 and backfill the rate reduction over a longer term is estimated to garner \$12.83 million in bonds.

The district will apply for the State OSCIM grant which, if awarded, is \$4 million in matching funds on top of the \$12.83 million.

Seismic rehabilitation grants may be available but would be for scope above and beyond the needs identified.

Energy grants will be pursued but are estimated to be less than \$100k, can only be determined after initial design, and are not expected to alter the amount of a bond.

LARGE Group Exercise

THREE BIG QUESTIONS

FROM YOUR PERSPECTIVE, WHAT DID WE MISS?

ARE THERE LARGER EDUCATIONAL / PROGRAM GOALS WE SHOULD BE SETTING OUR SIGHTS ON (I.E. PRE-SCHOOL, JOB TRAINING, LANGUAGE IMMERSION, ETC.)?

WHAT DO YOU THINK THE COMMUNITY WILL THINK ARE THE HIGHEST PRIORITIES?

Fern Ridge School District 2023 School Bond Planning Committee



NEXT STEPS

Meeting #2:

April 18, 2023

Small Group Plan Generation

6 pm – 8 pm

Location: Elmira High School Library

Fern Ridge School District 2023 School Bond Planning Committee

MEETING PACKAGE #2 APRIL 18, 2023, 6-8pm Elmira High School (Media Center)



Fern Ridge School District

2023 School Bond Planning Committee

MEETING #2 AGENDA

Welcome and Introductions
Tour (High School)
Goals & Targets Reminder
Question Follow Up
Corrected Data
Small Group Work Sessions on Project Prioritizations
Discuss Options to Explore
Next Steps

NEXT MEETINGS

Meeting #3- May 9th (Location: Veneta Elementary Library)
Narrow the plans to 2 and begin to refine

Meeting #4- May 30th (Location: Elmira Elementary Library)
Plan comparison - further refinement and recommendation of a single plan

Fern Ridge School District

2023 School Bond Planning Committee

Goals & Targets Reminder

End product

A recommended scope of capital issues to be addressed by the school district

A recommended timeline to address these issues

A recommended tax rate cap for capital funding

Timelines (2023-24)

Feb-Mar: District Needs Evaluation

April-May: Community Process

June: Community Outreach

Sept-Oct: Polling and Plan Refinement

November: Board Action

December: OSCIM Grant

Dec-Jan: POTENTIAL Collateral Development

Feb-May: POTENTIAL Informational Campaign

Qualitative Results

Improvements to facilities and sites that:

- Positively impact the student experience
- Make prudent fiscal investments
- Engage community in the schools

Fern Ridge School District

2023 School Bond Planning Committee

QUESTION FOLLOW UP

What do bonds pay for?

Bonds pay for improvements to buildings and sites and, in most cases, the furnishings that go in them. They do not pay for staff or new programs. For example, if a bond expands or modernizes an existing program space, there is staff to support it. If we use a bond to add more types of program space, there are not currently funds to support the staffing.

How much bond revenue can we generate?

To clarify, the district had previously gone out for a rate of \$2.20 (so may be what voters are used to). 2023-25, it will be \$2.10. 2026-36 it will drop to \$1.58. If a bond is passed in 2024 to “restore” the \$2.20 rate, it will be about \$12.83million and will run 15 years (till 2039). The rate need not stay at that and the amortization can be longer than 15 years. The \$4 million OSCIM grant would be on top of this.

What do you mean by an “active space for middle schoolers”?

When we demolish the rotted rear structure, students still need an outdoor activity and socialization space. What do middle schoolers like to do? What kind of space might they enjoy?

Fern Ridge School District 2023 School Bond Planning Committee

CORRECTED DATA

SITE	SIZE	CAPACITY*	ENROLLED
Elmira Elementary	48,190 SF	410-467	298
Veneta Elementary	44,407 SF	432-492	361
Fern Ridge Middle School	69,642 SF	511	291
Elmira High School	113,669 SF	720	396
District Services (3 bldgs.)	15,824 SF	N/A	N/A

*Capacity assumes 22 students per class (grades K-3) and 28 students per class (4-12). At Middle and High School levels, this assumes an 83% utilization rate for planning periods. At the elementary level, each classroom-sized space was counted and ranged 22-25 in K-3 and 28-32 in 4-5.

ENROLLMENT PROJECTION SUMMARY: A combination of the 2008-13 recession and the COVID period has slowed growth from the Lane County 2008 projections report. While growth will remain slow and steady, it is not anticipated to exceed the district's current student capacity. New programs and aging structures are a separate consideration.

2021 Lane County Report Summary: Birthrates are expected to maintain even with only a slight increase over current rates. Growth in Veneta is expected to go from a current population of 4,845 to 6,602 (2045) which translates to roughly 246 more school-age children in a 22-year period, or about 11 K-12 per year.

SMALL GROUP WORK SESSION

THREE BIG QUESTIONS

HOW SHOULD THE DISTRICT RANK EACH NEED AT EACH SITE?

1(MUST GO INTO THE BOND)

2 (WOULD BE NICE TO GO IN THE BOND)

3 (NOT AS CRITICAL)

WHAT NEEDS DO YOU THINK WE MISSED?

(INCLUDE THEIR RANKING IN YOUR LIST)

**AS EXTRA-CURRICULAR SPACE IS IMPORTANT, HOW (OR WHAT)
WOULD YOU DEVELOP TO SUPPORT STUDENTS & COMMUNITY?**

EXAMPLES:

MORE, OR IMPROVED, FIELDS

OUTDOOR SPACE FOR MIDDLE-SCHOOLERS (BE SPECIFIC)

(FEEL FREE TO DRAW ON THE AERIALS OR ON SEPARATE PAPER)

Fern Ridge School District

2023 School Bond Planning Committee

DATA – Identified Needs at Each Site

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Veneta Elementary School

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Fern Ridge School District

2023 School Bond Planning Committee

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Fern Ridge School District

2023 School Bond Planning Committee

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	EDUCATION	Weight room upgrades partnered with equipment donor			TBD
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Fern Ridge School District

2023 School Bond Planning Committee

DATA – Identified Needs at Each Site

District Services (assumed internal and not on a bond)

PRIORITY	WORK TYPE	SITE	DESCRIPTION	Recommended Construction Budget	Recommended Development Budget	Project Budget Total
	ENVELOPE	Bus Barn	Replace built-up roof at back	\$18,000	\$5,400	\$23,400
	ENVELOPE	Bus Barn	Roll-up garage doors (3) damaged and binding - replace	\$60,000	\$18,000	\$78,000
	SAFETY	Bus Barn	Barb wire on fencing - replace with angled extensions and no-climb	\$80,000	\$24,000	\$104,000
	SAFETY	Bus Barn	Add access controls	\$18,000	\$5,400	\$23,400
	SAFETY	Bus Barn	Add intercom / all call system	\$11,880	\$3,564	\$15,444
	SAFETY	Bus Barn	Limited surveillance - expand for full exterior coverage	\$15,000	\$4,500	\$19,500
	SAFETY	Bus Barn	Unsafe access conditions along south building side - add sidewalk along full length flush with stoops	\$12,000	\$3,600	\$15,600
	SITE	Bus Barn	Parking lot - grade and pave gravel lot	\$562,500	\$168,750	\$731,250
	ENVELOPE	District Offices	Repair water damage in basement along street-side wall	\$12,000	\$3,600	\$15,600
	FINISH	District Offices	10% (estimate) ceiling tiles stained / damaged - replace	\$6,000	\$1,800	\$7,800
	SAFETY	District Offices	Add access controls	\$18,000	\$5,400	\$23,400
	SAFETY	District Offices	Add intercom / all call system	\$11,880	\$3,564	\$15,444
	ENVELOPE	Maintenance Building	Evidence of roof leaking - replace roof	\$40,000	\$12,000	\$52,000
	LIGHTS	Maintenance Building	Poor task lighting at rear work areas	\$20,000	\$6,000	\$26,000
	SAFETY	Maintenance Building	Add access controls	\$18,000	\$5,400	\$23,400
	SAFETY	Maintenance Building	Add intercom / all call system	\$11,880	\$3,564	\$15,444
	SAFETY	Maintenance Building	Limited surveillance - expand for full exterior coverage	\$15,000	\$4,500	\$19,500
	SITE	Maintenance Building	Poor site drainage issues along street face – appears to overflow.	\$12,000	\$3,600	\$15,600

Fern Ridge School District 2023 School Bond Planning Committee

DATA – Our Sites

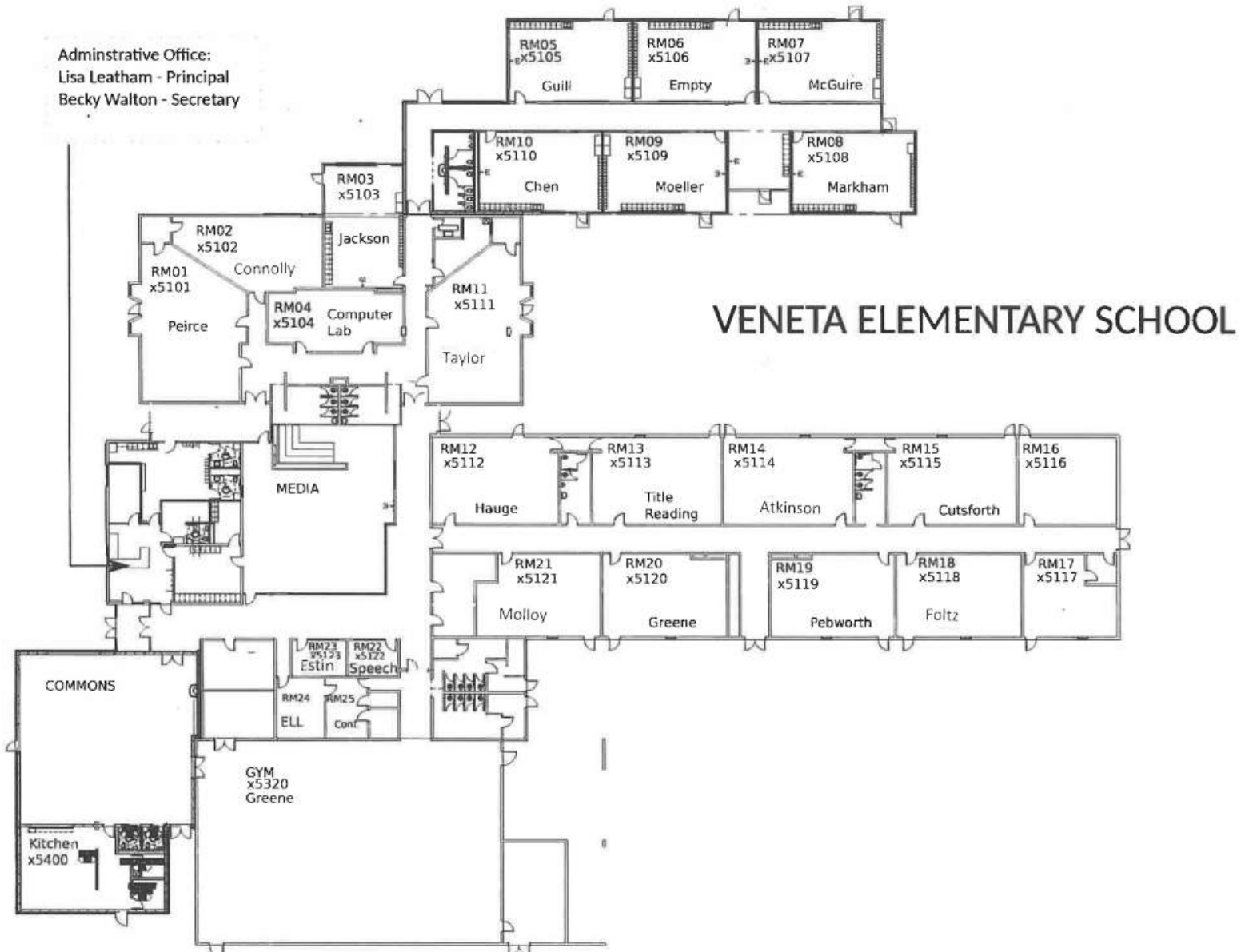
2022-2023



Elmira Elementary School
Fern Ridge School District

Fern Ridge School District 2023 School Bond Planning Committee

DATA – Our Sites



Fern Ridge School District 2023 School Bond Planning Committee

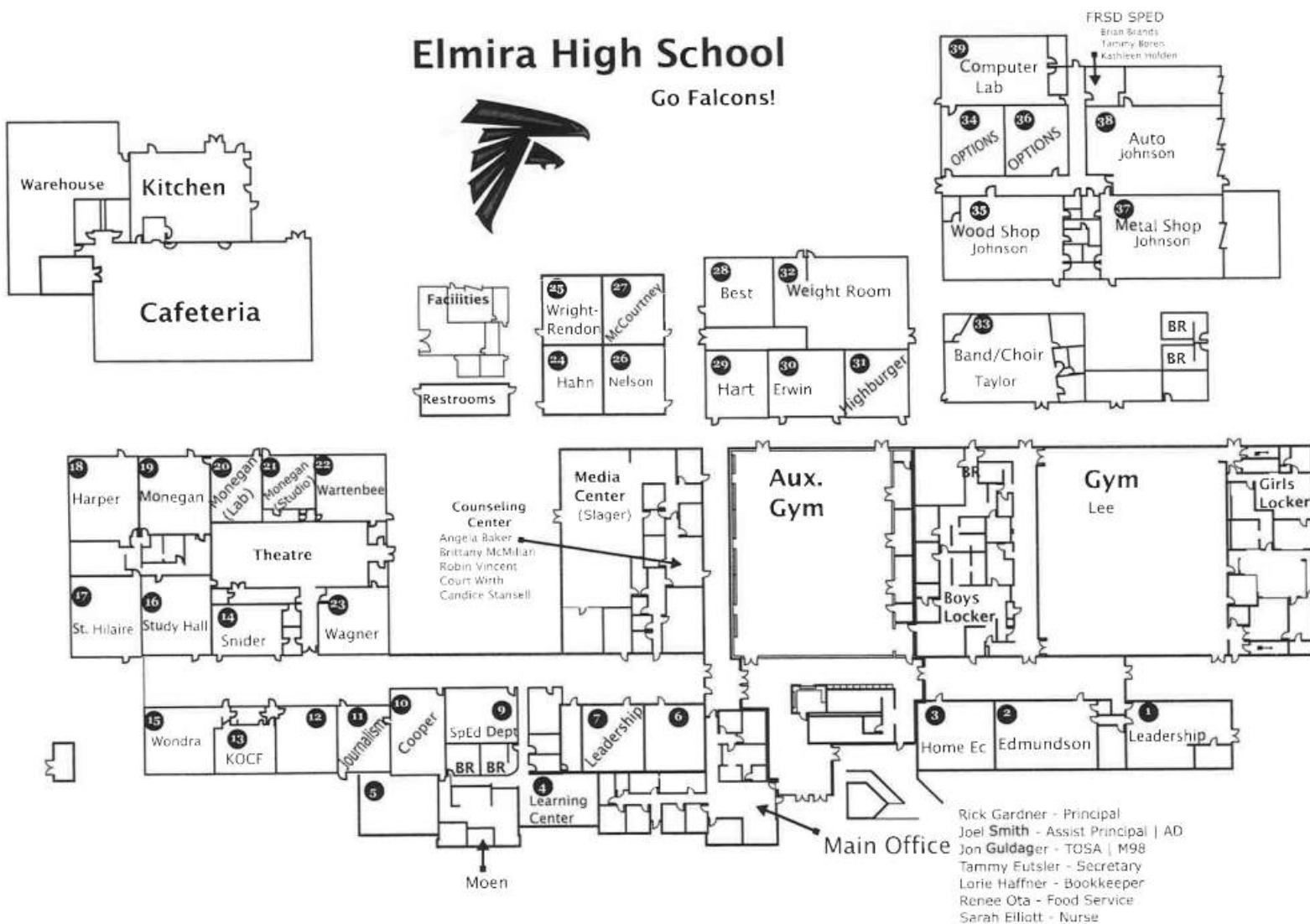
DATA – Our Sites

FERN RIDGE MIDDLE SCHOOL



Fern Ridge School District 2023 School Bond Planning Committee

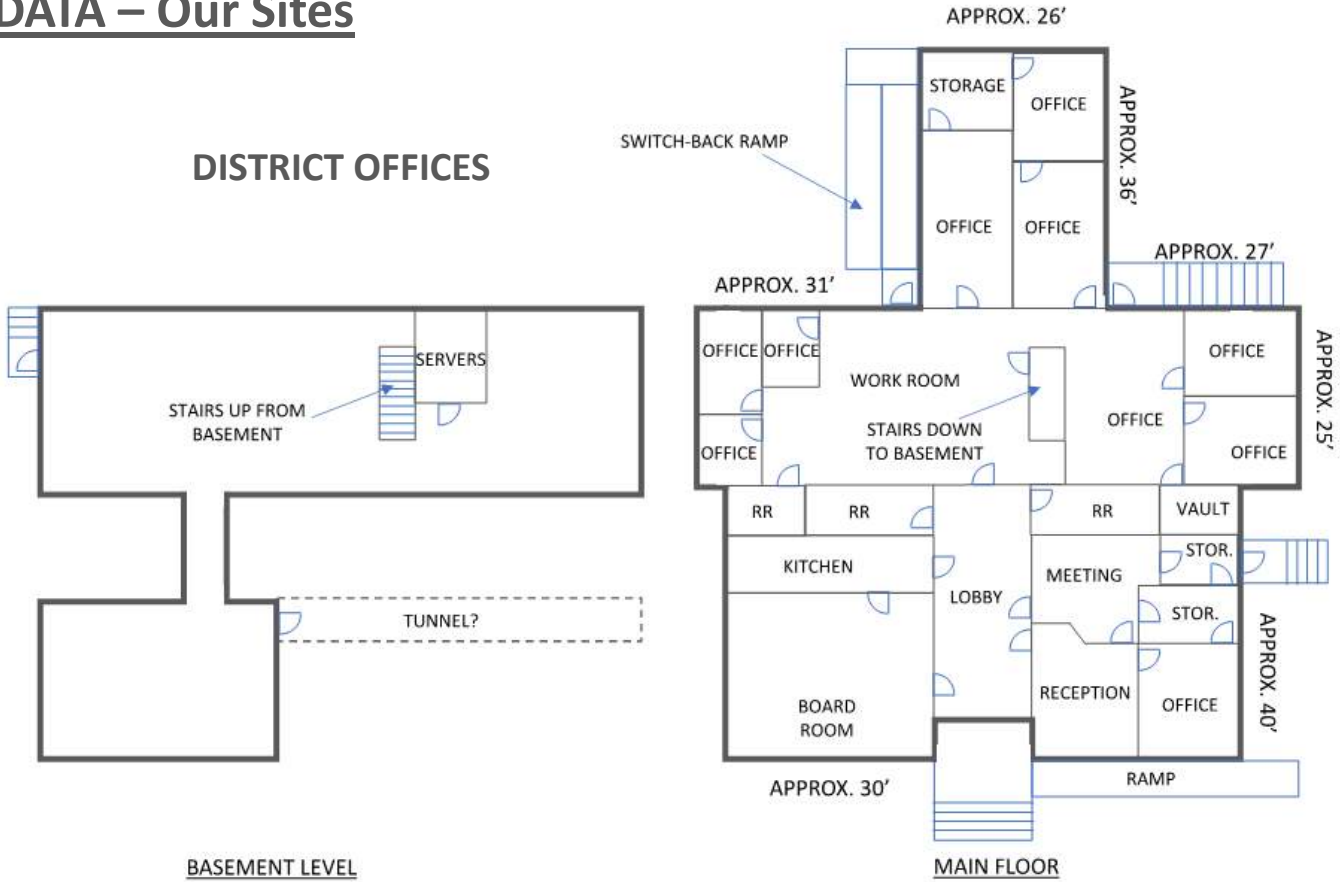
DATA – Our Sites



Fern Ridge School District 2023 School Bond Planning Committee

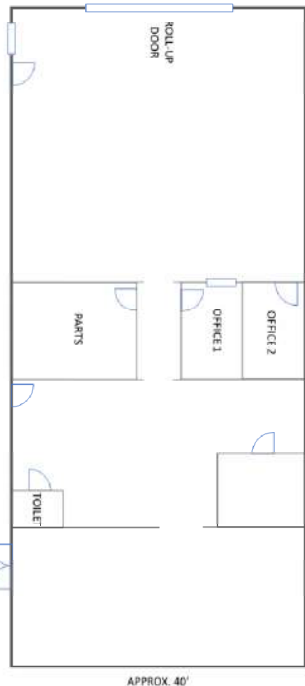
DATA – Our Sites

DISTRICT OFFICES

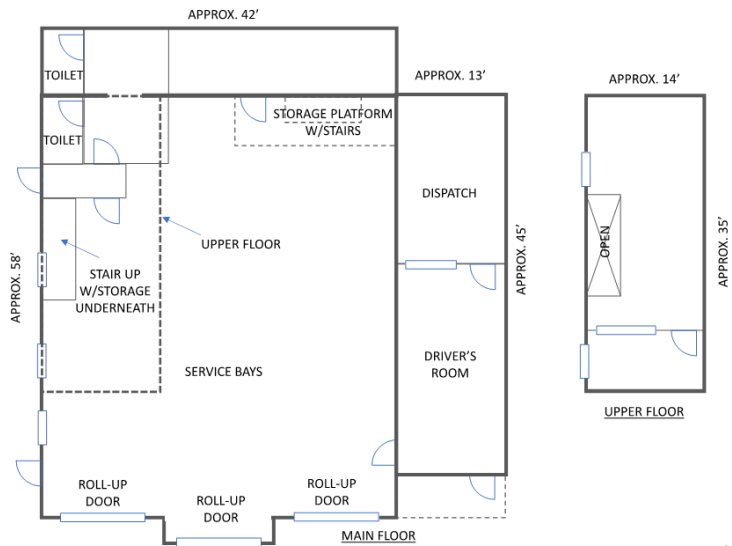


BASEMENT LEVEL

MAIN FLOOR



**MAINTENANCE
BUILDING**



**TRANSPORTATION
BUILDING**

Fern Ridge School District 2023 School Bond Planning Committee



NEXT STEPS

Meeting #3:

May 9th (Tuesday)

Review and Compare Plans

6 pm – 8 pm

Location: Veneta Elementary School Library

**Fern Ridge School District
2023 School Bond Planning Committee**

**MEETING PACKAGE #3
May 9, 2023, 6-8pm
Veneta Elementary School (Media Center)**



Fern Ridge School District

2023 School Bond Planning Committee

MEETING #3 AGENDA

Welcome and Introductions
Tour (Veneta Elementary)
Goals & Targets Reminder
Bond Cost Review
Small Group Work Sessions on Project Prioritizations
Report Out and Discussion
Next Steps

NEXT MEETINGS

Meeting #4- May 30th (Location: Elmira Elementary Library)
Plan comparison - further refinement and recommendation of a single plan

Fern Ridge School District

2023 School Bond Planning Committee

Goals & Targets Reminder

End product

A recommended scope of capital issues to be addressed by the school district

A recommended timeline to address these issues

A recommended tax rate cap for capital funding

Timelines (2023-24)

Feb-Mar: District Needs Evaluation

April-May: Community Process

June: Community Outreach

Sept-Oct: Polling and Plan Refinement

November: Board Action

December: OSCIM Grant

Dec-Jan: POTENTIAL Collateral Development

Feb-May: POTENTIAL Informational Campaign

Qualitative Results

Improvements to facilities and sites that:

- Positively impact the student experience
- Make prudent fiscal investments
- Engage community in the schools

Fern Ridge School District

2023 School Bond Planning Committee

BOND INFO & ESTIMATES

How big was our last successful bond?

In 2014, Fern Ridge went out for a \$26.67M bond with an estimated tax rate to remain at \$2.20 / thousand because the earlier bond was about to roll off. This was for a 25-year amortization.

How much bond revenue can we generate?

In 2023-25, the rate is estimated to be \$2.10 / \$2.11. In 2026-36, the estimated rate will drop to \$1.58. If a bond is passed in 2024 to “restore” the \$2.20 rate, it will be about \$12.83 million (assuming a 15-year amortization). The rate need not stay at that amount, and the amortization can be longer than 15 years. The \$4 million OSCIM grant would be on top of this.

What would be our bond rate compared to other districts in the area”?

Your bond rate currently is near the top with only Eugene and Pleasant Hill at higher rates. If the bond passes, your rate would only be slightly below Eugene’s.

Can we do work now and reimburse ourselves with the bond”?

Yes, if it is included in the bond language.

BOND INFO & ESTIMATES

REVIEW OF PIPER SANDLER
REPORT

**Fern Ridge School District
2023 School Bond Planning Committee**

SMALL GROUP WORK SESSION

THREE BIG QUESTIONS

DO YOU FIND THE 4-18-23 PRIORITIZATION SUMMARY REFLECTIVE OF THE DISCUSSION? IF NOT, WHICH ARE WRONG?

HOW DOES YOUR WALK OF VENETA ELEMENTARY TONIGHT CHANGE THOSE PRIORITIES?

BASED ON THE BOND DISCUSSION, IF YOU WERE TO DRAW A LINE, WHERE WOULD YOU DRAW IT?

**Fern Ridge School District
2023 School Bond Planning Committee**

LARGE GROUP DISCUSSION

WHERE DO WE ALL ALIGN?

WHERE DO WE MOSTLY ALIGN?

**WHERE DO WE NEED MORE DISCUSSION /
INFORMATION?**

Fern Ridge School District 2023 School Bond Planning Committee



NEXT STEPS

Meeting #4:

May 30th (Tuesday)

Tour Elmira Elementary School

Refine to a Single Plan / Review Board packet

6 pm – 8 pm

Location: Elmira Elementary School Library



Fern Ridge School District

Provide excellence for every student so that each will reach their greatest potential

Capital Facility Investments Community Planning Committee Recommendation



P O P U L A T I O N
F O R P R E C A S T

Coordinated Population Forecast



2021

Through

2071

**Lane
County**

Urban Growth
Boundaries (UGB)
& Area Outside UGBs

Photo Credit: Gary Halvorson, August 2005.

[https://commons.wikimedia.org/wiki/File:Three Sisters Mountains \(Lane County, Oregon scenic images\) \(lanD0014\).jpg](https://commons.wikimedia.org/wiki/File:Three_Sisters_Mountains_(Lane_County,_Oregon_scenic_images)_ (lanD0014).jpg)

**Coordinated Population Forecast for Lane County, its Urban Growth
Boundaries (UGB), and Area Outside UGBs**

2021 – 2071

Prepared by

Population Research Center

College of Urban and Public Affairs

Portland State University

June 30, 2021

This project is funded by the State of Oregon through the Department of Land Conservation and Development (DLCD). The contents of this document do not necessarily reflect the views or policies of the State of Oregon.

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The PRC project staff wish to acknowledge and express gratitude for support from the Forecast Advisory Committee (DLCD) and the hard work of many people who contributed to the development of these forecasts by answering questions, lending insight, providing data, or giving feedback.

How to Read this Report

This report should be read with reference to the documents listed below, which are downloadable on the Forecast Program website (<https://www.pdx.edu/population-research/population-forecasts>).

- *Methods and Data for Developing Coordinated Population Forecasts*: Provides a detailed description and discussion of the forecast methods employed. This document also describes the assumptions that feed into these methods and determine the forecast output.
- *Forecast Tables*: Provides complete tables of population forecast numbers by county and all sub-areas within each county for each five-year interval of the forecast period (2021-2071).

***Note: This is a corrected version of the final report for Lane County published on June 30, 2021. The original final report left out the survey responses from the City of Eugene in the Appendix A, even though the responses were cited in the report. The survey responses from the City of Eugene are included as a part of the Appendix A in this corrected version.**

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1. Methodology

The cohort component model and housing unit method were used for the population forecast. Details are described in the methodology document posted on the Population Research Center's website.

1.1 Data and Assumptions

This section lists the source of data and assumptions applied to the forecast.

1. Fertility and mortality:
 - a) Deaths and survival rates were projected based on historical trends (2000-2019) and based on the methodology published by Clark and Sharrow 2011¹. Mortality rates for the 85+ age group were further divided into 5-year age groups up to 100+.
 - b) We applied some constraints to ensure the number of deaths maintain in a reasonable range as the elderly populations grow, accounting for positive factors associated with life expectancy (e.g., advanced medical treatments, life-style changes).
 - c) Fertility rates were projected based on historical trend up to 2030 and remain constant afterwards.
 - d) Births and deaths were estimated for the year 2020 and 2021 to account for the events that take place between July 2019 and July 2022. The 2020 preliminary data from the Oregon Health Authority (OHA) was used at the time of this report.
2. Net migration rates were based on the data published by the University of Wisconsin-Madison for 2000-2010, with minor adjustments made based on the following assumptions:
 - a) In/out migration would gradually approach zero for populations over 65, assuming there is minimal moving for people as they approach the age of 85+.
 - b) Considered and mitigated the uncertainties of in/out migration among college students when applicable.
 - c) Considered the impacts associated with the COVID-19 pandemic that has been taking place since March 2020. Assumptions were made based on the differences between the 2019 and 2020 net migration data. Details are described in the methodology documentation.
3. Populations in sub-areas were forecasted using the housing unit method based on survey responses and historical pattern.
4. COVID-19 Impacts:
 - a) COVID-19 impacts on the components of population were not incorporated in the forecast because they are considered as short-term and temporary impacts that do not expect to post significantly influence the long-term population trends.
 - b) The impacts are reflected for the years 2020 and 2021 in some individual figures related to the population components (e.g., births and deaths, net migration) for illustration purpose. The 2020 and 2021 estimates shown in the historical figures are preliminary and may change when the data are finalized by the organizations that produce them.

¹ <https://csss.uw.edu/research/working-papers/contemporary-model-life-tables-developed-countries-application-model-based>

2. County Summary

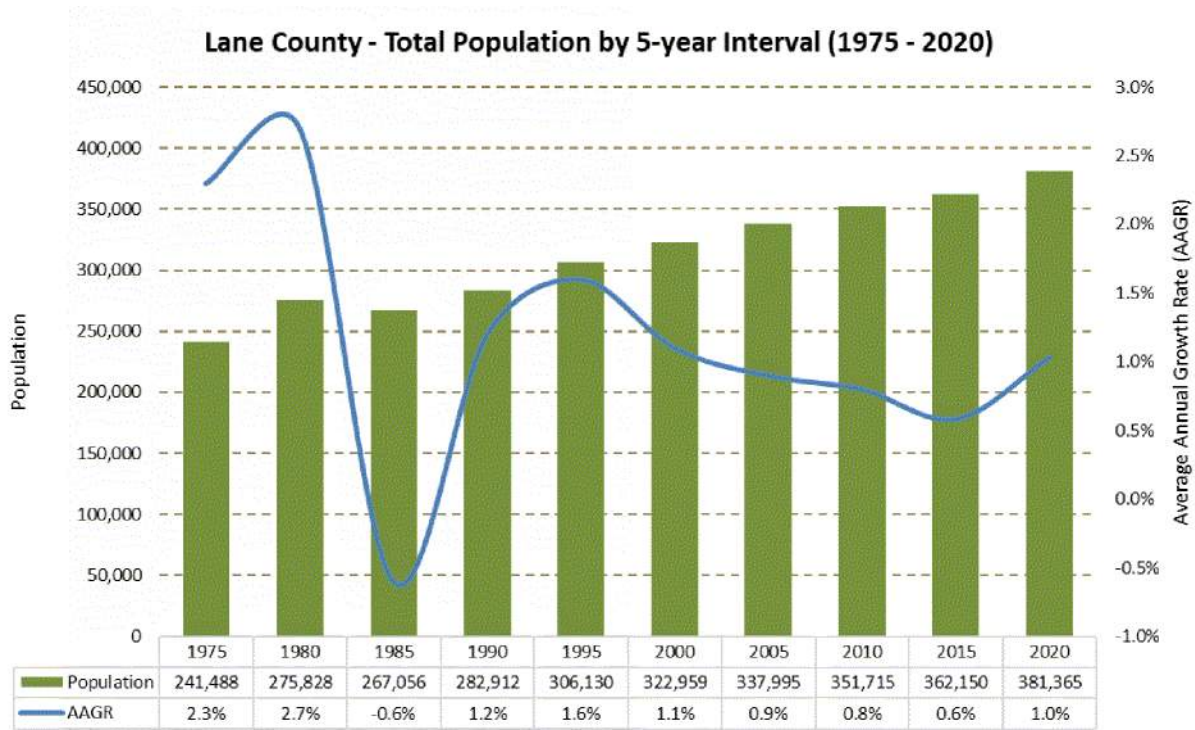
Lane County's growth centers around the Eugene/Springfield metropolitan statistical area (MSA). According to the 2019 American Community Survey (ACS), Eugene has 74,000 housing units. Eugene approved 3.8 thousand units over the last four years, with at least 830 under construction in 2019 and 2020 (1.1% of total stock). Springfield has an estimated 25 thousand housing units, as well as 990 units in the 5-year pipeline with 120 more in site planning. If all units materialize, there will be at least 1% AAGR in the housing stock.

The University of Oregon is a key economic player and growth driver and contributed a large student population within the county. Eugene and Springfield support the region's economy, while significant traded-sector job growth is rarely cited in responses from smaller cities. Both Eugene and Springfield expect their economic bases to grow as the University of Oregon is ramping up a science business incubator that expect to add 700+ jobs. Although manufacturing losses sustained in recent decades, Eugene expects to add 300 manufacturing jobs back now that one large vacant industrial complex has been purchased by a new company. Springfield expects job growth at Pacific Insurance, local healthcare providers, Wayfair, and potentially Royal Caribbean. These student/job gains drive population growth pressure in Eugene/Springfield and the broader area, as seen in sustained development activity. Nearly all cities within 30 minutes cite tight housing markets and low vacancy (e.g., Coburg, Lowell, Creswell, and Junction City) based on the general surveys collected by the PRC (Appendix A). Some cities have adopted policies that somewhat support housing growth, but some communities do not expect significant growth (e.g., Coburg and Dunes City).

3. Historical Trend and Population Forecast

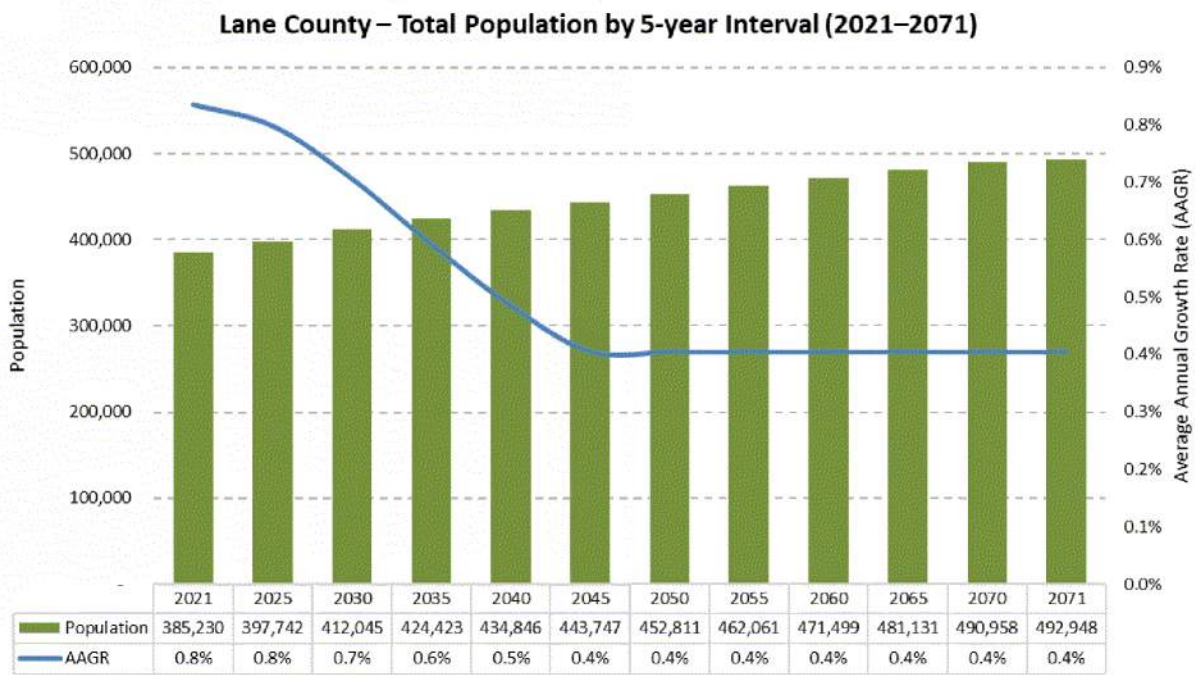
3.1 County Population

Historical data showed that Lane County population increased from 241,488 in 1975 to 381,365 in 2020, indicating a 58% increase in 45 year (Figure 1). Over the period from 1975 to 2020, the AAGR varied and reached a peak in 1980 at 2.7%. As shown in Figure 2, Lane County's population is projected to continue to grow throughout the forecast period, reaching 490,958 in 2070. The anticipated AAGR reaches 0.8% between 2021 and 2025 and the growth rate declines to about 0.4% by 2045. Recent trend showed the county-wide population growth rate varied between 0.6% to 1.1% since 2000, while the forecast indicates the growth rate remains under 1% in the next 50 years.



Source: U.S. Census Bureau, 1980, 1990, 2000, and 2010 census; PRC Annual Estimates, 1975, 1985, 1995, 2005, 2015, and 2020.

Figure 1. Historical total county population and AAGR, 1975-2020.



Source: Forecast by Population Research Center (PRC).

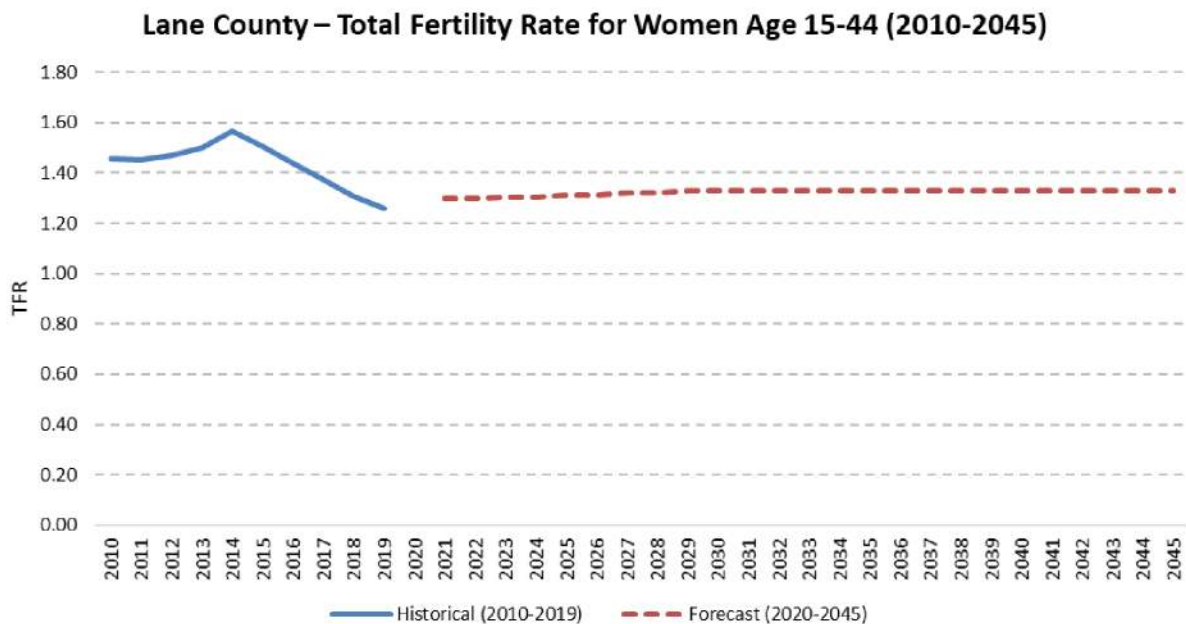
Figure 2. Forecasted total county population and AAGR, 2021-2071.

3.2 Births and Deaths

The total fertility rate (TFR) is shown in Figure 3. For women aged 15-44, the TFR has indicated a declining trend since 2014 and reached 1.26 in 2019. The TFR is projected to remain relatively constant at around 1.3 over the next 25 years. The 2020 TFR was intentionally excluded in Figure 3 due to uncertainties associated with the COVID-19 pandemic. The expected TFR pattern may be temporarily disrupted because of the pandemic. However, it is unlikely to accurately reflect this impact at the time of the report due to the lack of age-specific fertility data for 2020 and 2021.

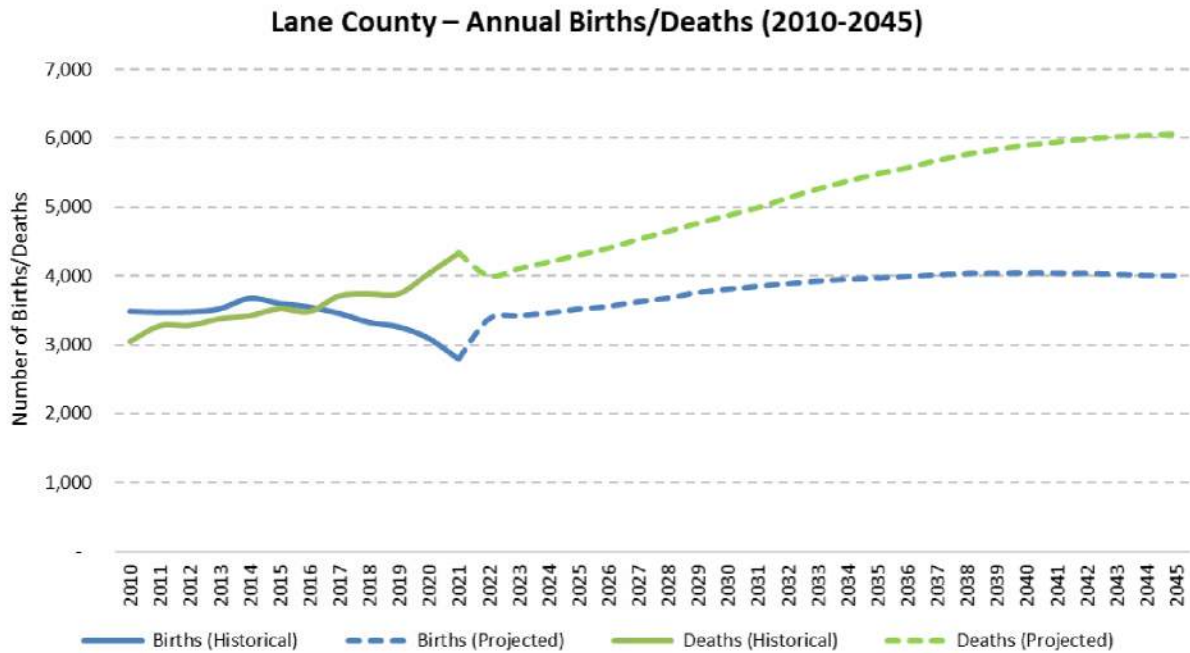
Figure 4 includes historical birth and deaths data, as well as estimations for 2020 and 2021. The 2020 and 2021 estimations were based on the preliminary 2020 records and the purpose of these estimations was to provide a better illustration that accounts for the potential impacts of the COVID-19 pandemic. In general, the number of births continues to grow and is projected to reach over 4,000 in 2045. In contrast, the number of deaths is projected to grow significantly in the next 25 years, reaching over 6,000 per year by 2045. Higher deaths numbers could be attributed to the increase in older population. In comparison, births are not projected to grow at a similar pace as fertility rate does not show any significant increase over the forecast period.

It is important to note that the number of births dropped between 2019 and 2021. Although birth numbers have shown a declining trend since 2014, the trend was estimated to be particularly steep in 2020 and 2021. In the meantime, the number of deaths was particularly high in 2020 and 2021 compared to previous years. This phenomenon may be attributed to the short-term effects associated with the COVID-19 pandemic.



Sources: Oregon Health Authority, Center for Health Statistics. Calculations and forecast by Population Research Center (PRC).
* A break is shown for 2020 due to uncertainties associated with the COVID-19 pandemic and the lack of finalized 2020 age-specific birth data. Some recent research suggested the fertility rate dropped during the pandemic, but actual data is not yet available.

Figure 3. Historical and projected total fertility rate (TFR), 2010-2045.

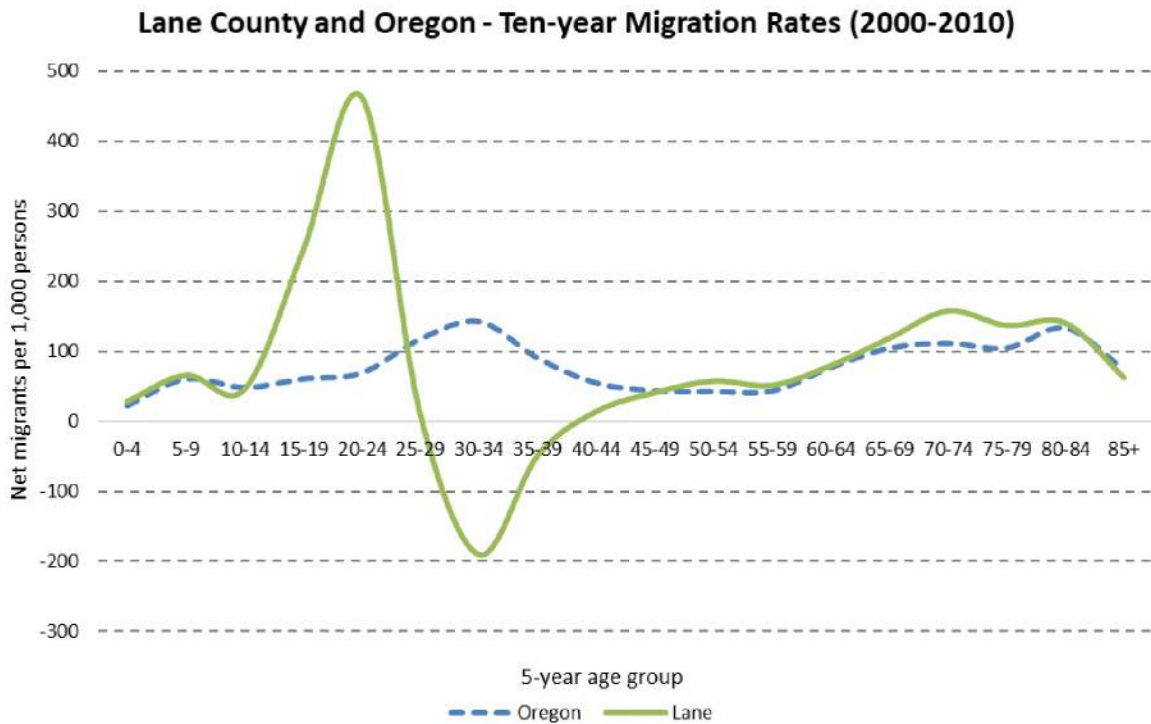


Source: Oregon Health Authority, Center for Health Statistics. Forecast by Population Research Center (PRC)
 * For illustration purposes, the 2020 preliminary data was used because the final data is not available at the time of the report.

Figure 4. Historical and projected annual births/deaths trend, 2010-2045.

3.3 Migration

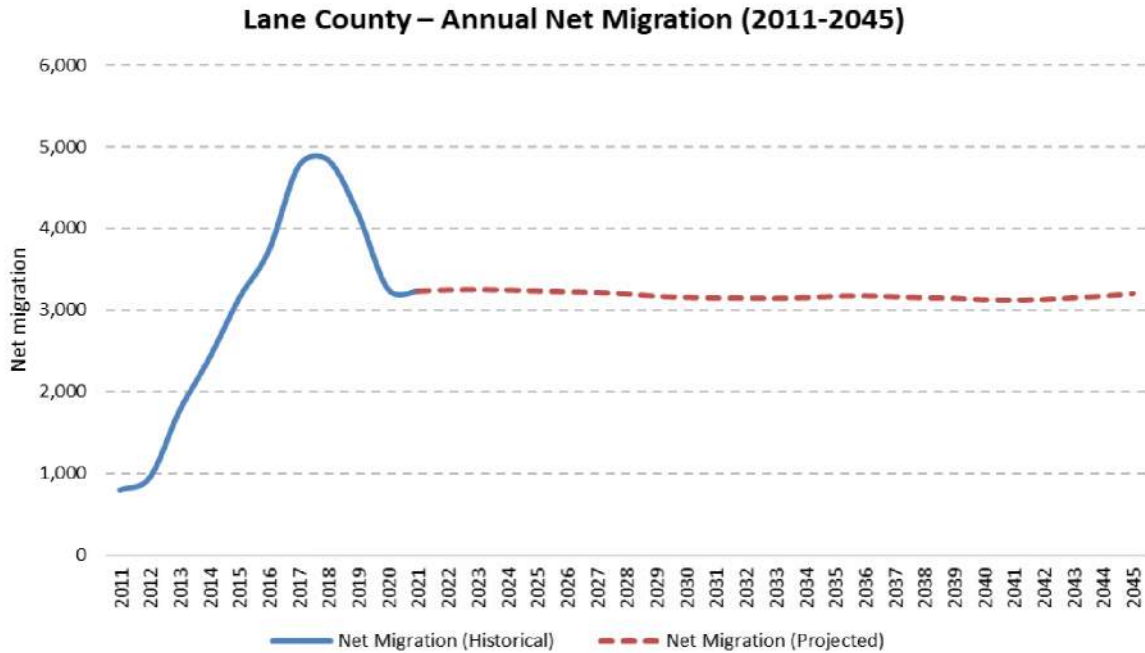
Figure 5 shows the historical migration rate from 2000 to 2019 for each 5-year age group. The 20-24 age group shows the highest net migration rate among all age groups and significantly higher than that of the Oregon State. This higher rate could mainly be associated with the student population at the University of Oregon. Negative net migration rate occurred in the 25-29 age group as the student population graduate and leaves the county or the state. The net migration rate for the oldest age groups was similar to that of the state.



Sources: Center for Demography and Ecology, University of Wisconsin-Madison. Calculated by Population Research Center (PRC).

Figure 5. Net migration rates by age in Lane County and Oregon, 2000-2010.

Based on the forecast, the net migration numbers remain relatively stable from 2020 to 2045. Historically, net migration in Lane County varied from year to year, from fewer than 1,000 in 2011 to nearly 5,000 in 2018 (Figure 6). However, with a little more than 3,000 net migration, 2020 experienced a decline in the number of in-migrants compared to 2019, which had 4,168 net migration. It is possible that the pandemic has posted an impact on the population flow. Given that Lane County houses the University of Oregon, the temporary campus closure has led to a decline in net migration among the student population.



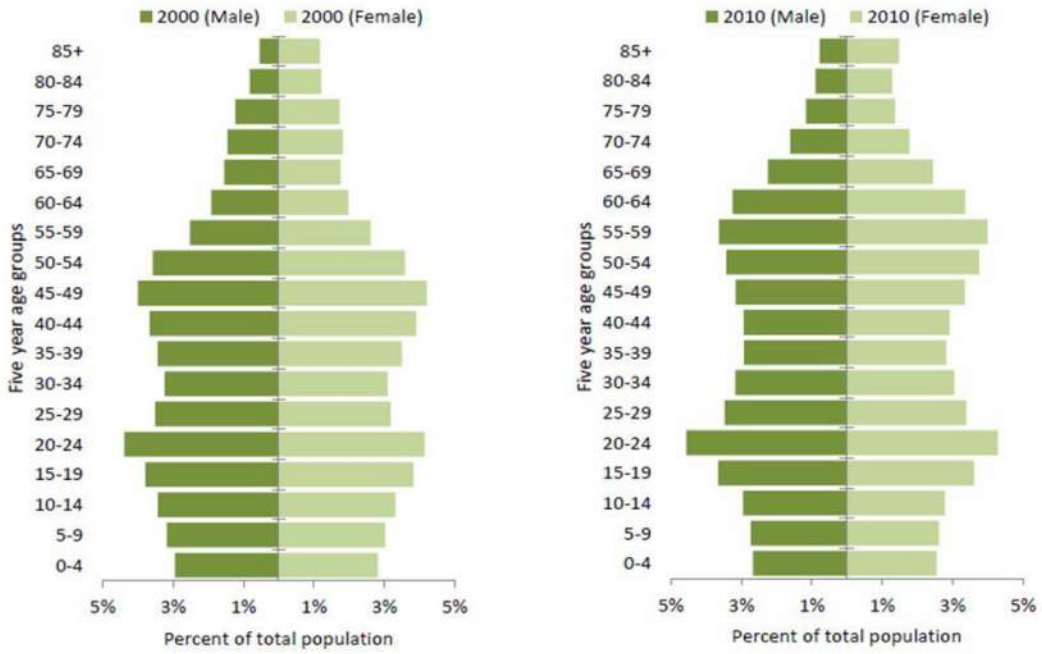
Sources: PRC Estimates. Calculated by Population Research Center (PRC).

Figure 6. Historical and projected total county net migration, 2011-2045.

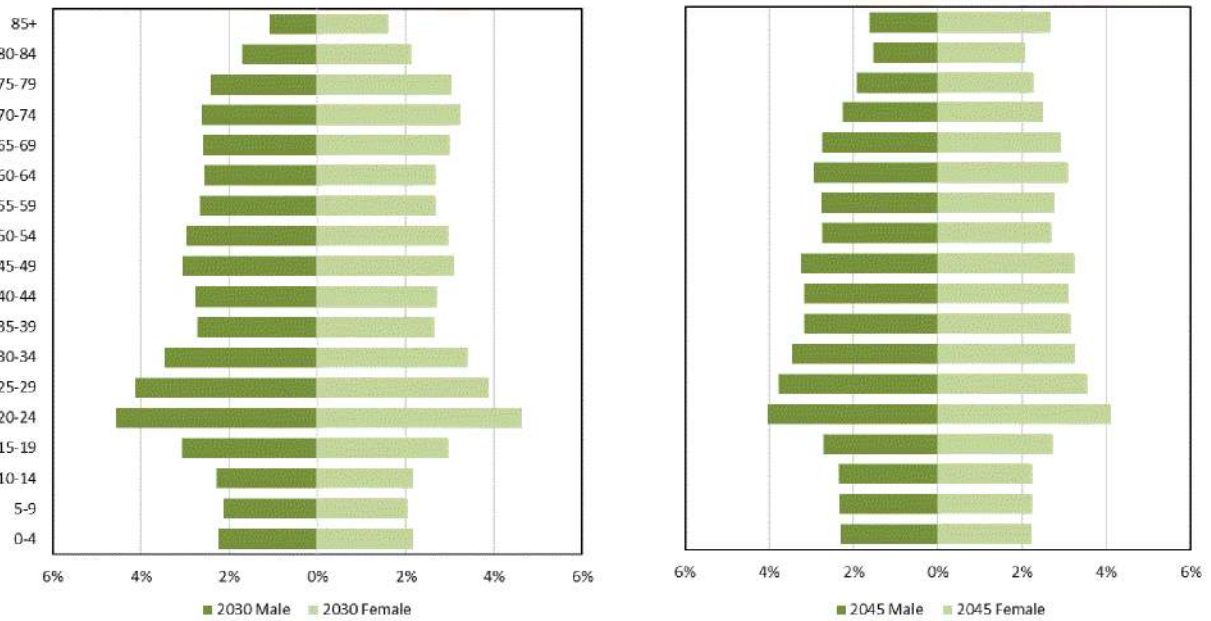
3.4 Age Structure

Due to a relatively large college student body, the population in the 20-24 age group has accounted for the largest share based on the 2000 and 2010 census (Figure 7). Compared to the 2000 census, the population share in the 30-49 age groups slightly declined in 2010 while the share of the population over 55 increased, indicating a population aging forward. There is an observable increase in the population share in the oldest age group in 2010. In Figure 7, population shares of the older age groups are projected to continue increasing across the years, for instance, the share of the 85+ age group increased from 2% in 2020 to 5% in 2045. Regardless of changes in other age groups, the 20-24 age group remains as the largest.

Lane County—Age Structure of the Population (2000 and 2010)



Sources: U.S. Census Bureau, 2000 and 2010 Censuses



Source: Forecast by Population Research Center (PRC).

Figure 7. Population structure by age and sex, 2000, 2010, 2030, and 2045.

3.5 Race/Ethnicity

Table 1 shows the race/ethnicity characteristics in Lane County from the 2000 and 2010 census, as well as the 2019 American Community Survey (ACS) estimates. It is important to note that the 2019 ACS is an estimation, and the sampling methodology is different from the 2000 and 2010 census. Race factor was not included as a part of the forecast but is provided in this report for reference. Population identified as White alone accounted for 88.6% and 84.7% of the county’s population in 2000 and 2010, respectively. With 75.9%, the Hispanic and Latino population has experienced the largest relative change from 2000 to 2010. The Hispanic and Latino population increased from 14,874 in 2000 to 26,167 in 2010, reaching 7.4% of the total population in Lane County. This population accounted for the second largest in the county. Populations identified as “two or more races” and “Asian alone” are the third and fourth largest in the county.

Table 1. County population by race/ethnicity.

	2000		2010		2019 estimates		Absolute change (2000-2019)	Relative Change (2000-2019)
Total population	322,959	100.0%	351,715	100.0%	373,340	100.0%		
Hispanic or Latino (of any race)	14,874	4.6%	26,167	7.4%	33,109	8.9%	18,235	122.6%
Not Hispanic or Latino	308,085	95.4%	325,548	92.6%	340,231	91.1%	32,146	10.4%
White alone	286,075	88.6%	297,808	84.7%	305,453	81.8%	19,378	6.8%
Black or African American alone	2,391	0.7%	3,102	0.9%	3,754	1.0%	1,363	57.0%
American Indian and Alaska Native alone	3,268	1.0%	3,418	1.0%	3,311	0.9%	43	1.3%
Asian alone	6,390	2.0%	8,169	2.3%	9,936	2.7%	3,546	55.5%
Native Hawaiian and Other Pacific Islander alone	562	0.2%	732	0.2%	879	0.2%	317	56.4%
Some other race alone	534	0.2%	514	0.1%	771	0.2%	237	44.4%
Two or more races	8,865	2.7%	11,805	3.4%	16,127	4.3%	7,262	81.9%

Source: U.S. Census Bureau, 2000 and 2010 census, and 2019 ACS. PRC Estimates. Calculated by PRC.

3.6 Component of Change

The component of population changes up to 2045 is shown in Figure 8. The darker blue shade indicates the natural increase/decrease, while the lighter blue shade indicates the net migration. Positive net migration implies that in-migration is higher than out-migration, and vice versa. At the county level, net migration remains positive, while natural decrease is expected to occur in 2027 and will continue afterwards. This implies that county-wide deaths are expected to outnumber births. However, since net migration remains positive and the absolute number of in-migration is more than that of natural decrease, the total population is projected to continue to grow. It is important to note that natural decrease is particularly high in 2021. This is because Figure 8 reflects the potential impacts of the COVID-19 pandemic, in which more deaths and fewer births are expected than usual.

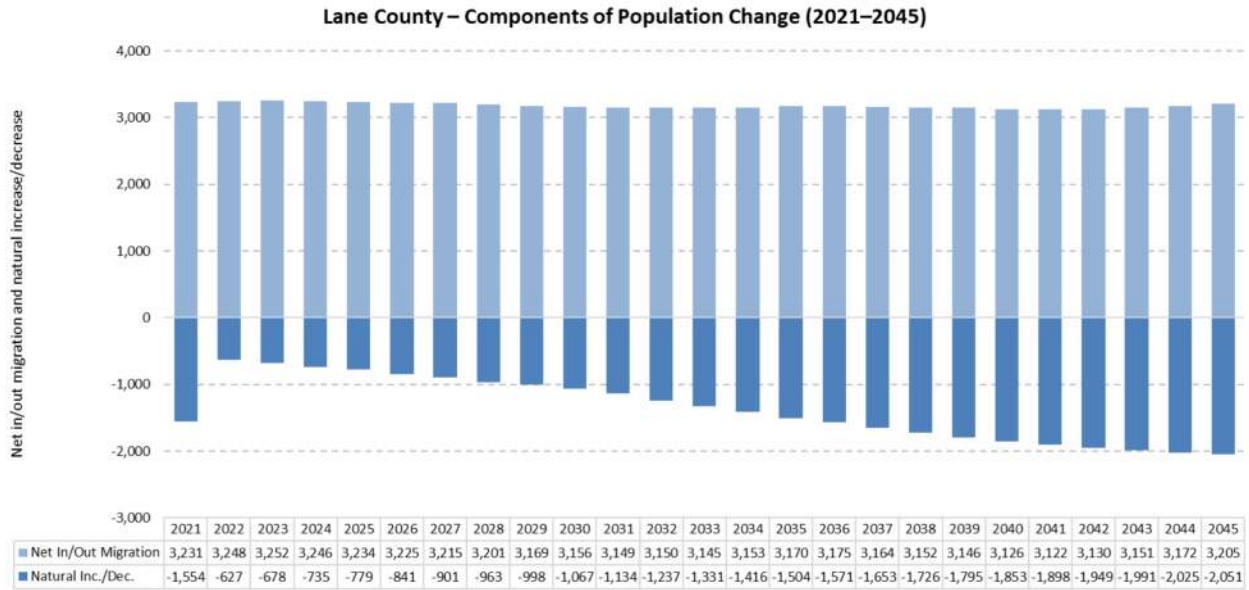


Figure 8. Components of population change, 2021-2045.

3.7 Sub-Area Population

Sub-area populations within and outside the urban growth boundaries (UGBs) are forecasted using the housing unit method. In general, populations within all the UGBs in Lane County will continue to grow through 2070. From 2020 to 2045, Lane County has AAGR of 0.6%. The Coburg, Creswell, Junction City, Lowell, Veneta, and Westfir UGBs are projected to have an AAGR of at least 1.0% in 2020-2045. The most populated UGB in Lane County, Eugene, will have a population of 236,650 by 2045, reflecting a 0.8% AAGR. Population outside of the UGBs is projected to decrease after 2045 (Table 2).

Table 2. Historical and forecasted population and AAGR in Lane County and its sub-areas.

	Historical			Estimates		Forecast			
	2000	2010	AAGR (2000-2010)	2020	AAGR (2010-2020)	2045	2070	AAGR (2020-2045)	AAGR (2045-2070)
Lane County	322,959	351,715	0.9%	381,365	0.8%	443,747	490,958	0.6%	0.4%
Outside UGBs	64,942	63,018	-0.3%	70,144	1.1%	70,631	67,834	0.0%	-0.2%
Larger Sub-Areas									
Cottage Grove	9,002	10,249	1.3%	10,660	0.4%	11,523	12,259	0.3%	0.2%
Eugene	157,989	177,263	1.2%	193,768	0.9%	236,650	268,322	0.8%	0.5%
Florence	8,929	10,327	1.5%	11,182	0.8%	14,040	17,840	0.9%	1.0%
Springfield	62,686	67,663	0.8%	70,337	0.4%	76,604	79,311	0.3%	0.1%
Smaller Sub-Areas									
Coburg	992	1,030	0.4%	1,375	2.9%	2,075	2,805	1.6%	1.2%
Creswell	3,993	5,470	3.1%	5,913	0.8%	8,783	13,293	1.6%	1.7%
Dunes City	1,267	1,278	0.1%	1,365	0.7%	1,580	1,824	0.6%	0.6%
Junction City	5,873	6,043	0.3%	6,954	1.4%	9,110	11,180	1.1%	0.8%
Lowell	877	1,058	1.9%	1,090	0.3%	1,462	1,829	1.2%	0.9%
Oakridge	3,315	3,272	-0.1%	3,458	0.6%	4,322	4,955	0.9%	0.5%
Veneta	2,801	4,782	5.3%	4,845	0.1%	6,602	9,025	1.2%	1.3%
Westfir	294	259	-1.3%	275	0.6%	365	479	1.1%	1.1%

Sources: U.S. Census Bureau. PRC Estimates. Forecast by Population Research Center (PRC).

3.7.1 Larger UGBs

UGBs that has a population of more than 8,000 in the 2010 census are considered larger UGBs. This includes Cottage Grove, Eugene, Florence, and Springfield. As shown in Table 3, Eugene continues to account for most of the county population shares throughout the forecast period. Its share increases from 51.3% in 2020 to 54.7% in 2070. The population share outside of UGBs decreases over time, accounting for 13.8% in 2070, compared to 18.4% in 2020. The population shares in the Cottage Grove and Springfield UGBs are projected to decrease over the 50-year forecast timeframe, even though the populations in these areas are projected to continue to increase.

Table 3. Population forecast for larger sub-areas and their shares of county population.

	Population			Share of County Population		
	Estimates	Forecast		Estimates	Forecast	
	2020	2045	2070	2020	2045	2070
Lane County	381,365	443,747	490,958	100.0%	100.0%	100.0%
Outside UGBs	70,144	70,631	67,834	18.4%	15.9%	13.8%
Larger Sub-Areas						
Cottage Grove	10,660	11,523	12,259	2.8%	2.6%	2.5%
Eugene	193,768	236,650	268,322	51.3%	53.3%	54.7%
Florence	11,182	14,040	17,840	2.8%	3.2%	3.6%
Springfield	70,337	76,604	79,311	18.6%	17.3%	16.2%

Sources: PRC Population Estimates, 2020. Forecast by Population Research Center (PRC)

Note: Larger sub-areas refer to areas with populations over 8,000 by 2010.

3.7.2 Smaller UGBs

Smaller UGBs in Lane County are projected to gain larger shares of the county population. Among them, Creswell and Junction City show the most growth in population share (Table 3). Creswell's share of county population grows from 1.6% in 2020 to 2.0% in 2045, and then again increases to 2.7% in 2070. Junction City's share of population grows from 1.8% in 2020 to 2.3% in 2070. Westfir is the only region that does not indicate foreseeable increase in population share throughout the forecast period. The total population share of smaller UGBs in Lane County increases to 9.2% in 2070, compared to 6.6% in 2020. By 2045, population within the smaller UGBs is projected to account for 7.7% of the total county population.

Table 4. Population forecast for smaller sub-areas and their shares of county population.

	Population			Share of County Population		
	Estimates	Forecast		Estimates	Forecast	
	2020	2045	2070	2020	2045	2070
Lane County	381,365	443,747	490,958	100.0%	100.0%	100.0%
Outside UGBs	70,144	70,631	67,834	18.4%	15.9%	13.8%
Smaller Sub-Areas						
Coburg	1,375	2,075	2,805	0.4%	0.5%	0.6%
Creswell	5,913	8,783	13,293	1.6%	2.0%	2.7%
Dunes City	1,365	1,580	1,824	0.4%	0.4%	0.4%
Junction City	6,954	9,110	11,180	1.8%	2.1%	2.3%
Lowell	1,090	1,462	1,829	0.3%	0.3%	0.4%
Oakridge	3,458	4,322	4,955	0.9%	1.0%	1.0%
Veneta	4,845	6,602	9,025	1.3%	1.5%	1.8%
Westfir	275	365	479	0.1%	0.1%	0.1%

Sources: PRC Population Estimates, 2020. Forecast by Population Research Center (PRC)

Note: Larger sub-areas refer to areas with populations over 8,000 by 2010.

4. Glossary of Key Terms

Cohort-Component Method: A method used to forecast future populations based on changes in births, deaths, and migration over time.

Coordinated population forecast: A population forecast prepared for the County along with population forecasts for its urban growth boundary (UGB) areas and non-UGB area.

Housing unit: A house, apartment, mobile home or trailer, group of rooms, or single room that is occupied or is intended for occupancy.

Housing-Unit Method: A method used to forecast future populations based on changes in housing unit counts, vacancy rates, the average numbers of persons per household (PPH), and group quarter population counts.

Occupancy rate: The proportion of total housing units that are occupied by an individual or group of persons.

Persons per household (PPH): The average household size (i.e. the average number of persons per occupied housing unit).

Replacement Level Fertility: The average number of children each woman needs to bear in order to replace the population (to replace each male and female) under current mortality conditions in the U.S. This is commonly estimated to be 2.1 children per woman.

5. Appendix A: General Survey for Oregon Forecast Program

County	Lane
Timestamp	11/10/2020 12:51
Jurisdiction	Creswell
Name and Title	Madeline Phillips, City Planner
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	Low vacancy rates, many additions and renovations to add capacity to existing housing stock.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	Existing Super 8 motel conversion to 47 apartment units was approved, September 2020
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	New gas station development
Infrastructure Projects (e.g. transportation and utilities)	Completed 3 reconstructed city blocks of A Street in October 2020
Other Factors Promoting Population or Housing Growth	Regional housing pressure, COVID 19 requiring people to seek larger spaces to inhabit in order to work and educate school-age kids.
Other Factors Hindering Population or Housing Growth	Buildable land is dwindling

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>Imminent Flood Risk Map changes are likely to have a significant impact on Buildable land in Creswell, for housing and employment. Housing needs prompted creation of a High-Density Residential zone (March 2020), which has been assigned to one 1 acre parcel so far. Creswell has approved efficiency measures to encourage smaller lots and more density in all zones.</p>
<p>Comments?</p>	

County	Lane
Timestamp	12/1/2020 17:12
Jurisdiction	City of Coburg
Name and Title	Anne Heath, City Administrator
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Demographics are changing to younger families with children
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	Housing is extremely limited. Houses remain on the market for a very short time. Rental units are extremely limited and hard to come by in Coburg.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	26-35 new standard residential homes in development in 21. Estimated occupancy of 2.5. Additional homes of equal amount in 22-23
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	Annexation application is being processed for 106 acres of low industrial land on eastside of I-5. Likely to be approved in March, 2021
Infrastructure Projects (e.g. transportation and utilities)	City is undertaking a water expansion project that provides water to the eastside of the freeway. In addition, the City is developing a 3rd well for great water capacity.
Other Factors Promoting Population or Housing Growth	Coburg is attractive to young families and is a quick sell for new housing. There is room for multi-use in several areas of the community which could encourage upper apartment/townhouses.
Other Factors Hindering Population or Housing Growth	Transportation is a issue for increased housing. The current UGB has transportation issues that the City is seeking to work out with the County.

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>The City recently conducted a build-out scenario survey in which we received a high percentage of participation from the community. The community was extremely clear about keeping a small historic town feel and limiting growth that would overburden our transportation infrastructure. There was considerable interest in encouraging mixed use projects and limiting big box, and or chain type businesses. The City will appoint a citizen committee to review development code in order to address some of the largest concerns raised during the survey and community meeting that was held as part of the workplan for the project.</p> <p>City infrastructure including water and sewer is sufficient (once water project is complete) to address growth in both residential and commercial.</p> <p>The city has seen very little change with Covid 19 outside of the restaurants in the downtown corridor. However the long range effects are still to be determined.</p>
<p>Comments?</p>	<p>I just found this while review Jeff Kernens email today. Jeff is no longer at the City and this email was missed. I hope you will still accept our answers.</p>

County	Lane
Timestamp	11/18/2020 15:18
Jurisdiction	City of Cottage Grove
Name and Title	Amanda Ferguson, City Planner
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Small but noticeable increase in immigrant (Guatemalan) population. The South Lane School district has hired three new people to assist with Spanish language and Mam language outreach program to meet needs of this community.
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	<p>cancy rates for both rentals and home purchases in 2018-2019 was around 1%. Rental rates have increase 30% over last 3 years. Rental vacancy rates in 2020 remain around 1%.</p> <p>First new multi-family (32 detached cottages) built in Cottage Grove in 2018 after 15 years. In 2019-2020, 15 new apartments were constructed in the downtown historic district. We also saw a 4-plex, 3-plex, and several ADUs. The adoption of a Multi-Unit Property Tax Exemption (MUPTEx) in January 2020 has led to construction of new several of these multi-family developments and to land use approval for 28 townhomes.</p>
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	<p>2019-20: 6 new affordable, single family homes on a single property (DevNW land trust model);13 tiny homes (Cottage Village); 4-unit Cottage Cluster for veterans by Homes for Good; Magnolia Gardens Assisted Living expanded capacity by 37 beds.</p> <p>Rezoned 6.8 acre parcel from Single Family Residential to Medium Density Residential to allow for the development of multi-family residential near elementary school -- expect application for 80 unit apartment complex for 1/3 of this property in early 2021, for development in 2021/2022.</p>

<p>Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)</p>	<p>Large new industrial employers: PakTech (10+ employees, rehabilitated building in industrial park and purchased adjacent land for expansion in 2021); Weyerhaeuser Cottage Grove (remodeled plant in 2018-2019, added additional staff). Small commercial employers (new): Covered Bridge Brewing Group, Oba Ramen, and Bartolotti's Pizza & Pasta all opened in 2020, with an estimated 10 new job openings. Also opened new office co-op space with capacity for 30 employees, currently at 50% occupancy.</p>
<p>Infrastructure Projects (e.g. transportation and utilities)</p>	<p>Infrastructure projects in 2018-2020 included the rebuilding of R Street, Safe Routes to School infrastructure project around Lincoln Middle School (sidewalk & crosswalk improvements, stormwater & waste water improvements), waste water and water treatment plant upgrades, construction of effluent storage pond at wastewater treatment plant (to allow for 100% storage of effluent for irrigation vs. discharge in river).</p>
<p>Other Factors Promoting Population or Housing Growth</p>	<p>Land use permit submitted to Lane County for second high water reservoir site off of N. 22nd Avenue (will allow for development above 740' in elevation without secondary pumping). Housing production strategies, such as MUPTE, changes to multi-family SDC calculations, non-profit SDC waiver program, and zone changes to allow higher densities/smaller lots & duplexes -- all were adopted in 2020).</p>
<p>Other Factors Hindering Population or Housing Growth</p>	<p>Limited housing inventory, limited availability of partitioned lots, and Covid-19</p>
<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>a) Summary of current or proposed policies affecting growth in your jurisdiction -- Housing Needs Analysis adopted in 2019, recommended increased focus on multi-family development and increased densities in residential areas. Housing Implementation Study 2019 led to adoption of MUPTE in 2020, code changes to increase minimum densities in residential areas and allow duplexes wherever single family homes are built (per HB 2001), and rezoning of 9+ acres to medium density residential (6.89 from single family residential and 2.29 from Commercial Tourist). b) Findings related to growth or population change -- City needs to accommodate 1379 new dwelling units in 20 years (69 per year) per Housing Needs Analysis. 25% of new housing needs to be multi-family, 10% needs to be single-family attached (compared to historic, where 74% of</p>

	<p>housing was single-family detached).</p> <p>c) The effects of wildfires or other disasters in your jurisdiction on housing, employment, economy and infrastructure -- Some displaced residents from wildfires 20-miles away relocated to community, filling hotel rooms, increasing number of temporary RV occupants.</p> <p>d) The effects of COVID-19 pandemic and policy measures on employment and current and planned developments -- economic impacts from COVID closures include reduced tourism and retail/restaurant/entertainment closures/reductions -- some businesses (theatre) entirely closed, some greatly reduced (25%-75% reductions in income). Did see two new restaurants open during COVID. Housing vacancies remain >1% (for purchase or rental). Increased homelessness/car-camping. Beds for Freezing Nights (housed in local churches) closed due to COVID, forcing emergency sheltering program by city (with pallet shelters).</p>
Comments?	

County	Lane
Timestamp	11/2/2020 11:45
Jurisdiction	Dunes City
Name and Title	Jamie Mills, City Administrator
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Majority of our population is over the age of 65
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	Houses are selling immediately upon listing if under \$500,000.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	Two subdivisions - one with 14 lots and one with 19 lots, but the 19 lot subdivision is going bankrupt.
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	None. Our Comp Plan does not allow businesses other than resorts and nursing homes.
Infrastructure Projects (e.g. transportation and utilities)	New hiking and biking pathway.
Other Factors Promoting Population or Housing Growth	We try not to, but short-term vacation rentals have discovered us.
Other Factors Hindering Population or Housing Growth	We have no city water or sewer so it is all wells, lake water, and septics.
Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.	The City policies currently deter growth. Our resorts, motels, RV parks, and the one restaurant we have were all adversely affected by COVID-19 policy measures. Mail is not being delivered timely or reliably. Continuity in Government was adversely affected by the virus as well, as we do not have the resources to have people work from home, so we furloughed all but one person from March through July. One person cannot keep up with all the information and survey mandates, as well as taxes, PERS, etc., and run the City as well.
Comments?	At this time, our City does not want growth.

County	Lane																						
Timestamp	11/30/2020																						
Jurisdiction	City of Eugene																						
Name and Title	Heather O'Donnell, Senior Planner																						
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	<p>We do not have additional information about household demographics other than the Census and ACS and the information we provided at the last population forecast survey.</p> <p>According to University of Oregon staff, the UO currently anticipates moderate growth (2.0% to 2.5% per year) in undergraduate student enrollment until 2026, and stabilized enrollment levels after that (Fall term fourth-week enrollment in academic year 2020-2021 was 18,054 for undergraduate students and 3,746 for graduate students). Graduate student enrollment growth is expected to increase very slowly.</p>																						
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	<p>Vacancy rates:</p> <ul style="list-style-type: none"> The city uses housing vacancy rates from the US Census and ACS 1 year or 5 year for long-term planning: <p>Average Vacancy Rate - Eugene</p> <table border="1"> <caption>Average Vacancy Rate - Eugene</caption> <thead> <tr> <th>Year</th> <th>Percentage of Housing Stock</th> </tr> </thead> <tbody> <tr><td>2000</td><td>5.4%</td></tr> <tr><td>2010</td><td>5.0%</td></tr> <tr><td>2011</td><td>6.0%</td></tr> <tr><td>2012</td><td>5.1%</td></tr> <tr><td>2013</td><td>5.9%</td></tr> <tr><td>2014</td><td>6.9%</td></tr> <tr><td>2015</td><td>6.3%</td></tr> <tr><td>2016</td><td>7.0%</td></tr> <tr><td>2017</td><td>6.0%</td></tr> <tr><td>2018</td><td>4.0%</td></tr> </tbody> </table> <p>Source: U.S. Census American Community Survey 1 Year Estimates, Table B25002; U.S. Census 2000, SF1 Table H3; U.S. Census 2010, SF1 Table H3</p> <ul style="list-style-type: none"> However, in 2019 the city polled 66 apartments and found an average of 97% occupancy at that time. <p>Short Term Rentals: Currently, we do not have accurate estimates of short-term rental items. In 2019, as part of a short-term rental discussion with City Council, we guesstimated there were about 850 short term rentals</p>	Year	Percentage of Housing Stock	2000	5.4%	2010	5.0%	2011	6.0%	2012	5.1%	2013	5.9%	2014	6.9%	2015	6.3%	2016	7.0%	2017	6.0%	2018	4.0%
Year	Percentage of Housing Stock																						
2000	5.4%																						
2010	5.0%																						
2011	6.0%																						
2012	5.1%																						
2013	5.9%																						
2014	6.9%																						
2015	6.3%																						
2016	7.0%																						
2017	6.0%																						
2018	4.0%																						

in Eugene based on cursory reviews of the major short-term rental websites. There are likely fewer now.

Number of new dwellings:

The draft graph below shows Eugene had an upswing in residential dwellings after the 2008 recession. The Housing Development Survey includes recent larger multi-family development projects, issued in 2019-10/31/2020.

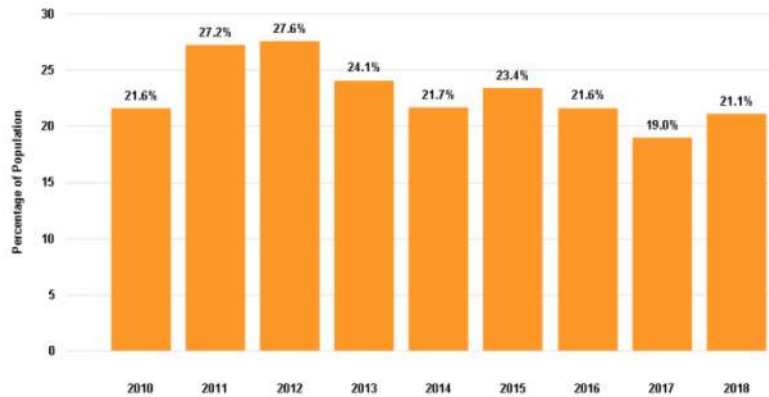
2001-10/31/2020 Issued Dwellings - Combined Totals																				10/31/
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total	827	901	693	982	1426	974	643	377	412	396	627	914	1154	1213	688	694	771	895	1048	902

Other observations:

- **Affordability-** Since 2018, Eugene has continued to be identified as a rent-burden city per HB 4006 and housing costs continue to rise. From the US Census and ACS 1 year estimates:

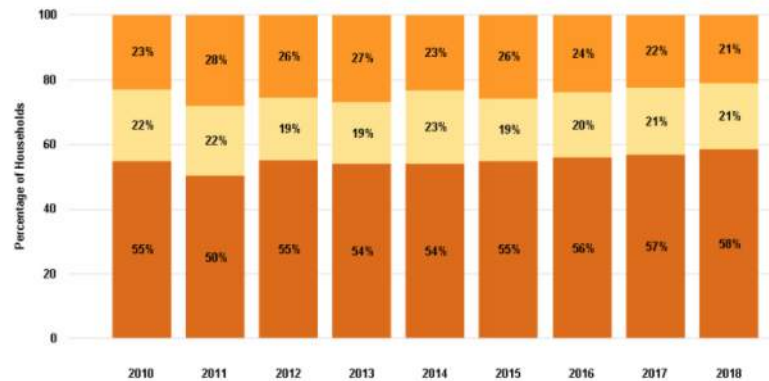
Population in Poverty - Eugene

Poverty statistics are for year prior to indicated census year.

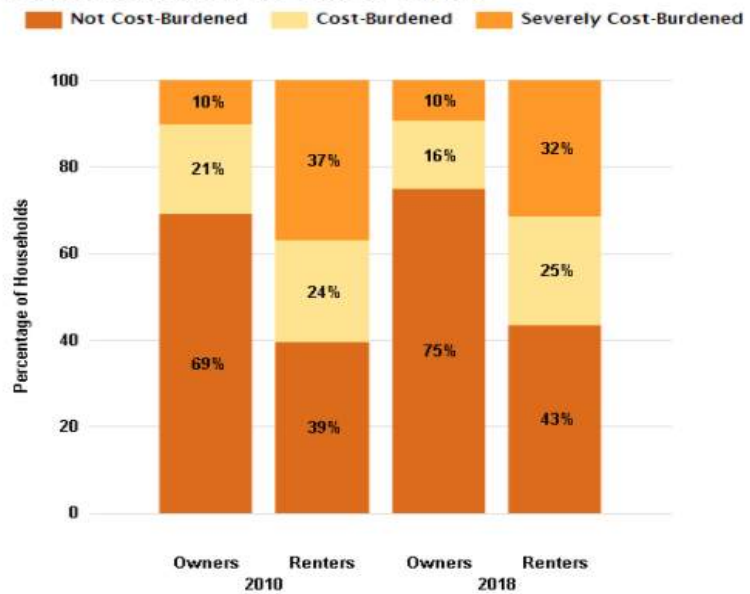


Cost-Burdened Households - Eugene

Legend: Not Cost-Burdened (Dark Orange), Cost-Burdened (Light Orange), Severely Cost-Burdened (Medium Orange)



Cost-Burdened Renters and Owners - Eugene



- HB 2001 will go into effect within the next couple of years. State rules allow us to assume an increase of up to 3% of housing capacity until we have supplemental data.
- Additionally, the city is currently considering updates to the City’s procedures and approval criteria to ensure the city’s clear and objective approval path does not include standards, conditions, and procedures that discourage housing through unreasonable cost or delay as required by State Law.

Employment and Economy-

- From the Eugene and Springfield area as provided in the [Eugene-Springfield Consolidated Plan](#): Economic conditions in Eugene and Springfield have recovered significantly in the past decade, and the region has emerged as a more diversified economy than it was during the Great Recession. The number of jobs has grown steadily during the decade, and unemployment rates have remained relatively low during recent years (below 6%). Wages have risen as well, although the loss of manufacturing jobs still has tempered wage growth in the region. In 2018, unemployment was 4.50%. Employment growth combined with retirements and declining unemployment rates is creating a strengthening economy. As the economy continues to improve, the labor market tightens, availability of skilled workers may create a

	<p>challenge for employers. Unemployment in the region has been decreasing but opportunities are limited for young unskilled workers. The new workforce of youth 16-24 years old accounts for 38% of the workforce. Getting younger workers to work in skilled career opportunities will allow the younger workforce to establish the experience and income that first jobs provide, a key workforce challenge facing both cities. The workforce problems facing younger workers today may follow them well into the future through lower lifetime earnings. While there have been recent and significant job losses as a result of COVID-19, it is unclear how sustained these job losses will be as social distancing measures diminish. It is apparent however that many people with limited incomes are experiencing financial instability as a result of recent events.</p>
<p>Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)</p>	<p>Vacant Residential land: Eugene’s land base includes approximately 2,157 lots that are vacant, platted, and zoned primarily for residential (there are additional tax lots that do not have a plat associated with them). Of these, 166 were platted more recently (in the last 10 years). See Housing Development Survey for new lots in the pipeline to be platted. There are also larger un-platted taxlots identified through Eugene’s UGB analysis as part of its adopted buildable land inventory. It is noted that Eugene heard through the UGB analysis adopted in 2017 that a significant amount of its buildable land is either not for sale for development or challenging/costly to develop for this area.</p> <p>The University of Oregon: The University of Oregon continues to have a goal of providing on-campus housing (dorms) for at least 25% of undergraduate students and anticipates continuing this goal.</p>
<p>Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)</p>	<p>Knight Campus for Accelerating Scientific Impact project, University of Oregon area:</p> <ul style="list-style-type: none"> • 155,000 square foot building comprised of research laboratories, faculty office space and classrooms. Over the next decade, it is estimated that the new principal Knight Campus researchers and their teams will add 750 new jobs and represent an estimated \$80 million in annual statewide economic gains

<https://www.hoffmancorp.com/project/knight-campus-for-accelerating-scientific-impact/>).

- Currently under construction, anticipated completion is 2020 (<https://accelerate.uoregon.edu/building-timeline>).

Previously Occupied Hynix building, west Eugene:

- Stratacache, a company that makes technology for digital signs used as highway billboards, fast-food menu boards, airport ticket kiosks and retail displays, bought the Hynix factory building in west Eugene that has been vacant for several years. They plan to have a production facility up and running by 2023. They will employ 300+ people, manufacturing digital signs.

Land Use Application data:

The following charts show Land Use Application activity for the last five years, 2010 through most of Nov 2020. Since the 2009 recession Eugene has been experiencing an increase in land division applications. Annexations and land divisions in particular are bellwethers for future housing development.

Legend:

Z= zone change

A = annexation

ST = subdivision, tentative (division for a minimum of 4 lots)

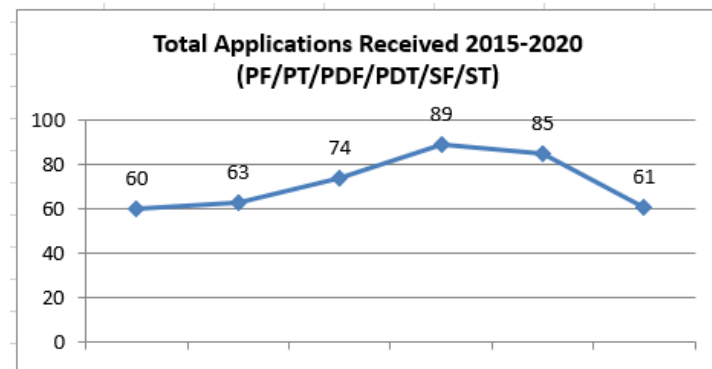
SF = subdivision, final

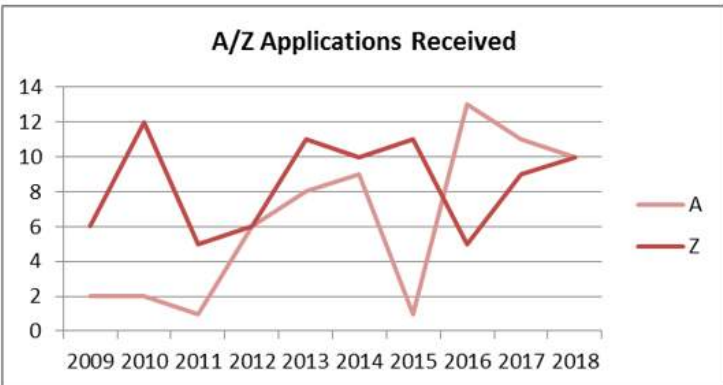
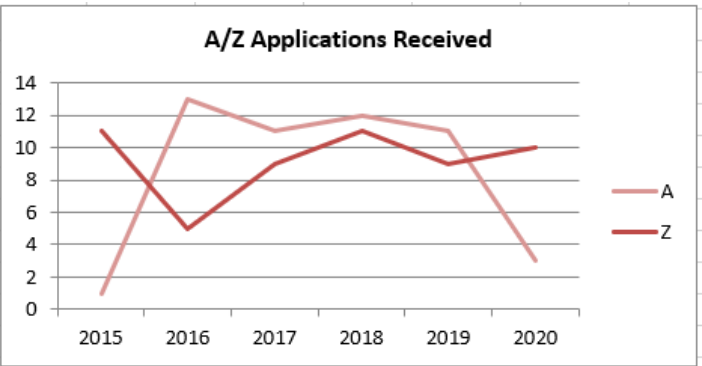
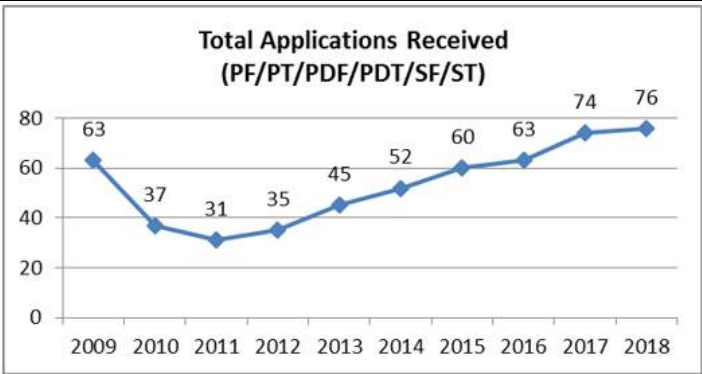
PT = partition, tentative (division for maximum of 3 lots)

PF = partition, final

PDT = planned unit development, tentative

PDF = planned unit development, final





Infrastructure Projects (e.g. transportation and utilities)

Transportation:

- There are no major capital projects on the horizon in the next 10 years for which we are confident of receiving funding. The attached spreadsheet lists capital projects that have received funding or for which we have submitted grant requests
- We have a 20-year TSP adopted in 2017 that shows how the City will develop transportation projects to accommodate the growth expected by 2035. To the extent that there are new planned arterial and collector roadways that are needed to serve new development, these will be constructed by developers. For the most part, the projects

constructed over the next 10 years are more likely to increase capacity for walking, biking and transit; of course, we need capacity for these modes to serve development just as we do for vehicles. In newer parts of Eugene, it's often the sidewalk network that is most lacking and not connected to the new development that has its own internal sidewalk network. We partner with ODOT on projects that are likely to increase the capacity for vehicles and the Beltline (River Road to Delta Highway) project is currently going through a NEPA study but there has been no funding identified for construction beyond the safety design changes that are currently under construction at the Delta/Beltline interchange.

Wastewater:

- Minor wastewater extensions have been made to the city limit as development occurred.
- 20-year, future: The city adopted the 2020 Wastewater Master Plan which identified wastewater system extension projects, existing pump station upgrades and new pump stations needed to serve developable areas within the Urban Growth Boundary established through Envision Eugene.

Water (Eugene Water and Electric Board):

- Most water service is planned if EWEB is aware of the need or if a developer contacts them. Generally, there is capacity in their big infrastructure to handle growth.
- The projects stated in the 2018 PSU survey are still applicable; EWEB is aware of some specific future developments that will need pump stations:
Likely to be in the next 10 years:
 - Laurel Hill Pump Station (for Laurel Ridge Development) (124 units)
 - Fairmount Pump Station for the Capital PUD Development (34 units)Could be next 10 or 10-20 depending on development:
 - 12,000 If 16" pipeline for the Clear Lake Expansion Area Over the next 20 years (new this year's survey):
 - Six 7.5 million-gallon reservoirs at three sites (College Hill, Hawkins Hill, and E. 40th Ave) over the next 20 years. However, these are not growth driven, they are replacing existing failing storage.

<p>Other Factors Promoting Population or Housing Growth</p>	<p>Eugene continues to place on “Best of..” lists, including;</p> <ul style="list-style-type: none"> • The Portland Business Journal recognized the City of Eugene in 2019 as the fifth healthiest employer in the State of Oregon with between 1,500 to 4,999 employees. • Livability.com Top 100 Best Places to Live in 2018 (Eugene #28) • the magazine <i>Bicycling</i> recently released a list of the top 50 bike cities in America (Eugene #7) • Forbes Best Places for Business and Careers (Eugene Metro area #28) • Eugene was named in the 20 Best Towns of the Future “Energy-Smart Cities” by Sunset Magazine for its use of more than 85% of energy from renewable resources. • The UO ranks 104 in the "Best National Universities" list of top tier institutions in U.S. News Media Group’s 2020 America's Best Colleges rankings of 1,800 schools. • Eugene was designated a Gold Level - Walk Friendly Community by the Pedestrian and Bicycle Information Center. • Eugene’s Willamette River trail has been named one of the top 19 urban bike paths in the country by USA Today. The trail, officially called the Ruth Bascom Riverbank Path System, is ranked No. 10 on the newspaper’s list. <p>Eugene is home to the University of Oregon, a local, regional, national and international draw to our community, as well as other institutions of higher learning including Northwest Christian University, Lane Community College, New Hope Christian College, Gutenberg College, and Pacific University's Eugene campus.</p> <p>Eugene will be hosting the IAAF World Track and Field Championships in 2022, welcoming thousands of visitors. Construction of a new riverfront park at the downtown riverfront redevelopment site, hotels and other associated infrastructure and services is expected. The University of Oregon’s Hayward Field track facility is currently being completely rebuilt and expanded for this event.</p> <p>The Oregon Employment Department Employment Forecast projects Lane County employment to grow by 1.07% during 2019-2029.</p> <p>In 2017 the City adopted our 20-year (2012-2032) urban growth boundary for jobs, housing, schools, parks and other public facilities and an associated 20-year transportation system plan. There have been no changes to the UGB since then.</p>
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<p>Other Factors Hindering Population or Housing Growth</p>	<p>Some of the areas with the most development capacity for housing or jobs are not served, are expensive to serve, or are dependent on developer construction. As mentioned above, Eugene has heard through the recent UGB analysis process that a significant amount of its buildable land is either not for sale for development or challenging/costly to develop for this area.</p>
<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>a) The City is developing an adoption package for a 27-year urban reserve beyond our 2032 UGB. This would meet the City’s projected growth needs to 2059, based on current forecasts and assumptions. The analysis assumes a 0.69% population growth rate from the 2019 PSU forecast and a 1.07% employment growth rate from the Oregon Employment Department 2019 10-year forecast.</p> <p>b) As mentioned during the 2018 PSU forecasting survey, in 2017 the City adopted its 2012-2032 UGB. The analysis assumed a 0.9% population growth rate (PSU forecast) and a 1.43% employment growth rate (OED 2012 10-year forecast). Key elements include:</p> <ul style="list-style-type: none"> • UGB expanded for Bethel School District elementary school (54 ac (25 buildable)), employment/industrial land (643 ac (450 buildable) /3,200 jobs), and community park (222 ac) in the Clear Lake Road Area. UGB expanded for a community park (35 ac) in the Santa Clara area. • The UGB accommodates the entire 20-year multi-family and commercial demand inside the existing UGB through additional actions by the City. <ul style="list-style-type: none"> ○ High Density multi-family (1,300 apartments) and commercial retail is accommodated in the downtown through use of tools (zoning code amendments, financial incentives, etc.) that encourage redevelopment. ○ Medium Density residential is accommodated by amending the zoning code to slightly increase the minimum density required in medium density residential zones. ○ Land use code was changed (adopted in 2014) so that industrial land can accommodate more of the commercial office demand (estimated gain: 4,250 jobs inside UGB). • The 20-year Low Density Residential housing need was also accommodated inside the UGB through adopted (2014) plan designations changes from multi-family to low density residential in areas where low density may be more feasible (estimated gain: 631 low density residential units inside the UGB). SDC reductions for accessory dwellings are currently under consideration by City Council and if adopted, are

expected to incentivize 84 additional dwellings over 20 years.

- Analysis assumes that all jobs lost during the recession (2006-2010) will be accommodated in existing buildings inside the UGB.
- Analysis assumes the University of Oregon needs 45 additional acres for non-housing university uses beyond the existing campus area.
- Status of development in the Clear Lake UGB expansion area remains the same:
 - The entire Clear Lake expansion area contains 924 acres for jobs, schools and parks amidst active streams, canals, and wetlands, which are an invaluable asset to our local and regional ecosystems. The City of Eugene’s Stormwater Basin Master Plan provides area-wide guidance to manage stormwater, protect wetland and floodplain resources, and mitigate impacts to natural resources. The City is exploring a large sports field complex at this location as well.
 - The City allocated \$70,000 for readying the Clear Lake site for development. Accordingly, the City is currently performing analyses for stormwater management planning and design; recommendations for wetland protection, mitigation, and/or restoration; identifying infrastructure needs; establishing a wetland mitigation bank; and recommending phasing to accomplish these efforts. It will be a few years before the studies are completed and the City has a timeline for development readiness of this area.

For more information on the adopted UGB please see:

[Eugene Comprehensive Plan](#)

[Eugene 2012-2032 Residential Land Supply Study](#)

[Eugene 2012-2032 Employment Land Supply Study](#)

For a copy of the BLI, please contact Thea Evans at TEvans@eugene-or.gov for more information

c) Wildfires: The destruction of housing stock in the McKenzie River Valley has made Eugene’s tight housing market even tighter, especially at the lower-cost end of the spectrum. While Eugene did not lose any housing (or structures) within its city limits, there are now displaced households in need of housing. Additionally, the fires slowed or stopped outdoor work for about two weeks in Eugene but didn’t directly impact Eugene. We’ve heard concerns about the quality of Eugene’s drinking-water quality given the fire’s proximity

	<p>to our watershed—however EWEB has indicated that its purification system can handle negative impacts.</p> <p>d) COVID: Construction has continued throughout 2020. There were three large housing projects that had begun before the pandemic (5th St Market expansion, Ferry St Manor, and the Art building on Pearl at 17th) and they are all very close to completion, and two new large student-housing developments are moving ahead. We are currently analyzing building permit data to consider if building permits have kept on pace even during COVID. Housing permit numbers and land use application data are identified earlier in this survey.</p>
Comments?	

County	Lane
Timestamp	11/30/2020 11:03
Jurisdiction	City of Florence
Name and Title	Roxanne Johnston, Senior Planner, CFM
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	<p>According to demographic data found at the following link, https://www.towncharts.com/Oregon/Demographics/Florence-city-OR-Demographics-data.html our community's population has a median age of 60.3. I could not find current birth rates nor immigration. According to this link, https://worldpopulationreview.com/us-cities/florence-or-population our population overall enjoyed a growth rate of 1.51% annually, with a 10.83% growth rate since the 2010 Census. According to the same link, here is the breakdown of the population by race since the last ACS:</p> <ul style="list-style-type: none"> • White: 92.31% • Two or more races: 2.82% • Asian: 1.80% • Other race: 1.66% • Native American: 1.10% • Native Hawaiian or Pacific Islander: 0.23% • Black or African American: 0.08%
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	Vacancy rates are very low, seasonal occupancy (even with the Covid pandemic) was high this summer, very few, if any demolitions, and several renovations. High-priced short-term rentals dominate the market during the tourist season and squeeze out rental opportunities for workforce housing groups. Construction materials are on the rise and since the community is rural, costs may be higher due to the need to transport them. Construction crews from out of the area may find temporary housing hard to find and rental costs prohibited to the developer.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	This past year has seen two planned housing developments; an HOA with 12 units and another with 16 units. The 12 have been permitted and should be ready for occupancy in early 2021. Some of the 16-unit HOA have been sold and are occupied and the remainder nearly completed and are currently for sale.
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	<p>The seasonal tourism economy has become less seasonal, especially with COVID-19 and people are choosing not to travel – people still travel to the beach, but are staying close to home.</p> <p>Most of the business license applications submitted this year have been focused on service and construction industries; many operate out of their homes and are self-employed. In the coming year, a carwash and a coffee kiosk duo are targeted for completion and employment for those</p>

	is projected to be 13-15 for the kiosk (5 being full time) and one employee to maintain the carwash.
Infrastructure Projects (e.g. transportation and utilities)	ODOT and the City of Florence have been working on a beautification project along Highway 101 within the City. This includes new ADA accessible sidewalks, planters as traffic dividers, landscaping, pedestrian crosswalks with flashing lights, and bike lane striping. The City has also erected some placemaking monoliths at the entrance of Old Town. These monoliths echo the historic bridge design monoliths. No new water/sewer facilities at this time.
Other Factors Promoting Population or Housing Growth	Recession recovery has impacted growth as has the competition for non-profit receipt of state loans for low-income housing. Generally speaking to housing construction as a whole, infill- 'easy' lots are built out and now more challenging lots (with steeper slopes requiring more engineering, for example) are being developed.
Other Factors Hindering Population or Housing Growth	Affordable/workforce housing not being built fast enough, low number of available rents and these are not cost effective to rent given the high rental markets of this past year. No doubt, Covid-19 impacted job opportunities (and associated childcare facilities and businesses and costs) and have limited travel from bedroom communities that may have enjoy lower housing costs.
Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.	<p>a. Current policies in place include placement of manufactured homes in all residential zoning districts, accessory dwelling units permitted on any lot with a single-family residence, housing code updates which included increased density, smaller lot sizes, and increased lot coverage.</p> <p>b. More recent findings for population and housing growth include a Housing Needs Analysis & Economic Opportunities study (adopted late 2018). This study maintains that Florence's population was 8,947 and assuming a growth rate of 0.9% over twenty years, that the population would then be 12,554: https://www.ci.florence.or.us/planning/housing-and-economic-opportunities-project-completed-nov-2018 The United States Census Bureau https://www.census.gov/quickfacts/florencecityoregon sites a projected July 2019 population for Florence of 9,151.</p> <p>c. Although our county was affected by the wildfires, our coastal region was not in the affected area. To the best of my knowledge, we have not seen an increase in population from those relocating from those areas.</p>

	<p>d. Pandemic policy have shuttered some businesses. The extent is yet to be discovered; but the gap between when some businesses were required to close (restaurants, for example) and the time to receive state financial aid assistance may have been to great for those businesses to stay afloat. Their employees of those face to face service industries no doubt felt the economic pressures. Also, some business owners who were under the impression that they were 'at risk' for contracting Covid have also felt the negative economic effects of the pandemic.</p>
<p>Comments?</p>	<p>The link to our Florence Realization 2020 Comprehensive Plan is: https://www.ci.florence.or.us/sites/default/files/fileattachments/planning/page/639/florence_realization_2020_comprehensive_plan_complete_-_jul._2018.pdf</p>

County	Lane
Timestamp	11/2/2020 15:13
Jurisdiction	City of Junction City
Name and Title	Planning Technician
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	139 unit apartment complex nearing completion, buildings completed are rented. Building permit applications under review for 129-unit apartment complex. 8 duplex units recently received building permit approvals.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	300+ lot PUD received final approval from the JC Planning Commission 10-21-2020
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	none.
Infrastructure Projects (e.g. transportation and utilities)	W 10th Avenue extended west. Planned extension of W 6th Avenue to the west (spring 2021)
Other Factors Promoting Population or Housing Growth	
Other Factors Hindering Population or Housing Growth	

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	
<p>Comments?</p>	

County	Lane
Timestamp	11/3/2020 13:31
Jurisdiction	City of Lowell
Name and Title	Joyce Donnell - City Clerk
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Our population is increasing with the median age decreasing, a strong Caucasian presence.
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	A shortage of housing. Homes are being renovated and sold in matter of days. New ones are being built.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	We have two subdivisions being worked on currently.
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	There are plans in the making, but nothing on paper yet.
Infrastructure Projects (e.g. transportation and utilities)	Working on roads, and automated water meters.
Other Factors Promoting Population or Housing Growth	Fantastic School system.
Other Factors Hindering Population or Housing Growth	Limited space.

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>We are at a very exciting forward movement with our City.</p>
<p>Comments?</p>	

County	Lane
Timestamp	11/25/2020 10:03
Jurisdiction	City of Springfield
Name and Title	Comprehensive Planning Manager
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Springfield has a younger community on average compared to the county and state, because of the type of jobs we offer, slightly lower housing/utility costs compared to Eugene, and our proximity to the University of Oregon. Thus, we have more younger families that are having children. Our Hispanic community does not seem to be growing, perhaps because of the high costs of low-ownership.
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	No notable seasonal occupancy or student housing. Vacancy rates in multi-family at about 3.3% in 2019 and has dropped to perhaps close to 1% or even lower this year. We have two months of inventory of homes for sale for the past two years. The tight inventory leads to increasing prices and lack of population growth. There is not much happening in terms of renovations, but we are seeing some infill developments adding density in some neighborhoods.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	Developer pipeline projects (primarily Marcola Meadows 440 single-family and 300 multi-family) for a total of 900 units to be constructed over the next few years (see companion housing survey). Assisted living project on game Farm Road of about 104 rooms. Homes for Good 76 multi-family units under construction with occupancy in 2021. 20 multi-family units has final site plan approval to start construction in 2020 on Main Street. Cherry Springs has about 100 multi-family units but is still in proposal stage. A few other multi-family projects also in proposal stage. Four duplex units are under construction as well as a scattering of accessory dwelling units.
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	Expected new jobs include 100 at Wayfair and 50 at PacificSource. Two hospitals are each adding 20-30 jobs per year. Potential expansion of Royal Caribbean and other employers in the north Gateway area (estimating 100 new jobs in the next couple years).
Infrastructure Projects (e.g. transportation and utilities)	Increased pressure to address congestion at the Gateway-Beltline intersection. Finishing Phase 3 of Jasper trunk sanitary sewer line by 2023. Will have extended sanitary sewer on S. 28th Street to the Mill Race and paving of that road by 2023. McVay Highway road improvements (currently doing NEPA analysis) to support employment at

	development on Wildish and Weyerhauser properties are forthcoming (sanitary sewer already in place).
Other Factors Promoting Population or Housing Growth	Overall quality of life. Proximity to the University of Oregon and the recent growth of the UO, proximity to Eugene airport for flight commuters, infrastructure supported economy (esp. the gig economy), proximity to outdoor quality of life features, availability of experienced contractors and sub-contractors. People potentially relocating from the McKenzie River valley after the Holiday Farm fire.
Other Factors Hindering Population or Housing Growth	Constrained housing market (limited stock and diversity of housing for both rental and ownership). Eugene offers a higher return on investment so developers not as likely to develop in Springfield. Other smaller housing markets nearby offer more affordable options. Lack of market comparables creates an insecure financial market for multi-family housing projects. Lack of easy-to develop sites and perception of high infrastructure costs.
Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.	<p>The purpose of the development code update is to support efficient, timely, and clear development review. It will make it easier to develop a mixture of housing types, including middle housing.</p> <p>The City Council is reexamining vertical housing tax exemption for downtown and may also adopt the multi-unit property tax exemption for other parts of Springfield to encourage multi-family housing.</p> <p>Within the urban renewal districts, the Springfield Economic Development Agency pays the system development charges on behalf of qualifying projects. It is also exploring taking a role in market rate (invest and own).</p> <p>The City has waived system development charges for accessory dwelling units to encourage this infill housing type.</p> <p>The City Council is exploring the financing of infrastructure extension (sanitary sewer and stormwater) and including those projects in the Capital Improvement Plan to encourage residential development.</p> <p>City will maintenance of the enterprise zone program that incents new jobs and new equipment investments.</p> <p>City is undertaking an inventory and assessment of the wetland and riparian areas in the recent UGB expansion area of land targeted to employment. This effort along with</p>

	<p>addressing the transportation issues in the north Gateway area are preparing those properties for urbanization and ultimate development.</p> <p>The city has an adopted economic strategy to focus on site readiness and job creation/retention. The economic development manager actively works to carry out this strategy.</p> <p>c) Holiday Farm wildfire impacts have created a water vulnerability for the water supplier for EWEB and increased potential for flooding. Some of the McKenzie River community evacuees have landed in Springfield and may decide to settle here. Our unhoused population is likely to grow as the evacuees are currently getting FEMA support lack resources to find and maintain housing in a tight rental market and may rely more on living in recreational vehicles or doubling up with family/friends.</p> <p>d) The City has taken extraordinary measures to continue services to residents/businesses. Not sure of total impact of COVID until the lease moratorium comes to an end. COVID has slowed progress on the assisted living facility construction and some commercial development. We don't have a large inventory of speculative office buildings, so we may will probably do better than other communities in bearing the economic impacts.</p>
Comments?	

County	Lane
Timestamp	11/23/2020 16:16
Jurisdiction	Veneta
Name and Title	Evan MacKenzie, Community Dev. Dir.
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	<p>Enrollment at Fern Ridge School District has been increasing steadily, from a low of 1297 in 2014-2015 to 1425 in 2019-2020. While enrollment at Elmira High School (which serves the entire district) has declined slightly, enrollment at Veneta Elementary has gone up.</p> <p>The U.S. Census population estimate for Veneta on July 1, 2019 was 5,056. This number is higher than the PSU Population Research Center 2019 estimate of 4,800.</p> <p>Empirical observations align with official data and indicate the population of Veneta is overwhelmingly white, with few minorities. This is generally consistent with the Eugene-Springfield metro area.</p>
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	<p>There are not a lot of listings here in Veneta, and those that we do see often sell fairly quickly. There are a number of ready to build lots available currently, but building on those requires a buyer who can afford to build while paying a second rent or a mortgage during construction. It is difficult to obtain information specific to the land inside City limits from sites such as Realtor.com, because data results do not align with our boundary.</p> <p>We have few known homes that are only seasonally occupied, and very few listings on sites such as AirBnB. Our town is still relatively young, so we do not have a large stock of very old homes that get major renovations or demolitions.</p>
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	<p>The only project currently “in the works” is phase 1 of Madrone Ridge, which will result in 37 new single family detached homes. Several phases remain, which together include another +/-60 lots. We have several projects underway on Jameson Lane (14 duplex lots) and in the vicinity of 10th and Nottingham (15 lots).</p> <p>See response below for Other Factors Hindering Population or Housing Growth.</p>

<p>Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)</p>	<p>We have no Economic Development activities or projects underway that can be expected to result in a significant number of new employees in the City in the next year. We have however had a new Grocery Outlet store open very recently and will see a new Dollar General store open very soon, both of which will provide a small increase in local jobs.</p>
<p>Infrastructure Projects (e.g. transportation and utilities)</p>	<p>We have no major projects planned. On the plus side, we have no known deficiencies regarding our ability to provide services that would limit new development.</p>
<p>Other Factors Promoting Population or Housing Growth</p>	<p>We have a fairly large supply of buildable land.</p>
<p>Other Factors Hindering Population or Housing Growth</p>	<p>Like all jurisdictions across Oregon, we cannot simply “make” someone build housing. We have one project in town where the developer completed as many phases as they could before dedicating a public park, and then simply quit the project and put the property up for sale. This has left perhaps 100-200 lots unplatted. We have another project where the original developer lost the project, and the new owner is proceeding, but after five years we will only see the first of several phases platted before the approval expires. Another large project including senior housing and separate single family homes went to LUBA last year, and although the City’s approval was affirmed, the developer has decided to market the property with the entitlement rather than move forward.</p> <p>It should not go unstated that the cost of land, labor and materials is generally increasing faster than incomes. That means any new housing is not likely to be “affordable” for a first-time home buyer or a renter. The only thing that will help those who need it most is a massive increase in the availability of “used” housing.</p>

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>We have no recent or pending policy changes that should have a significant impact on growth and development. We are working on several code updates to make our Land Development Code easier to use, but there are no significant changes to what can be done. We have done no studies that would indicate any changes to anticipated growth. The wildfires had no direct impact on city growth and development, but we could potentially see some of the people displaced from the fires east of Springfield look for new housing in our area. While the COVID-19 pandemic has impacted Veneta as it has everyone else, we have no direct evidence that would give us insight into longer term impacts.</p>
<p>Comments?</p>	

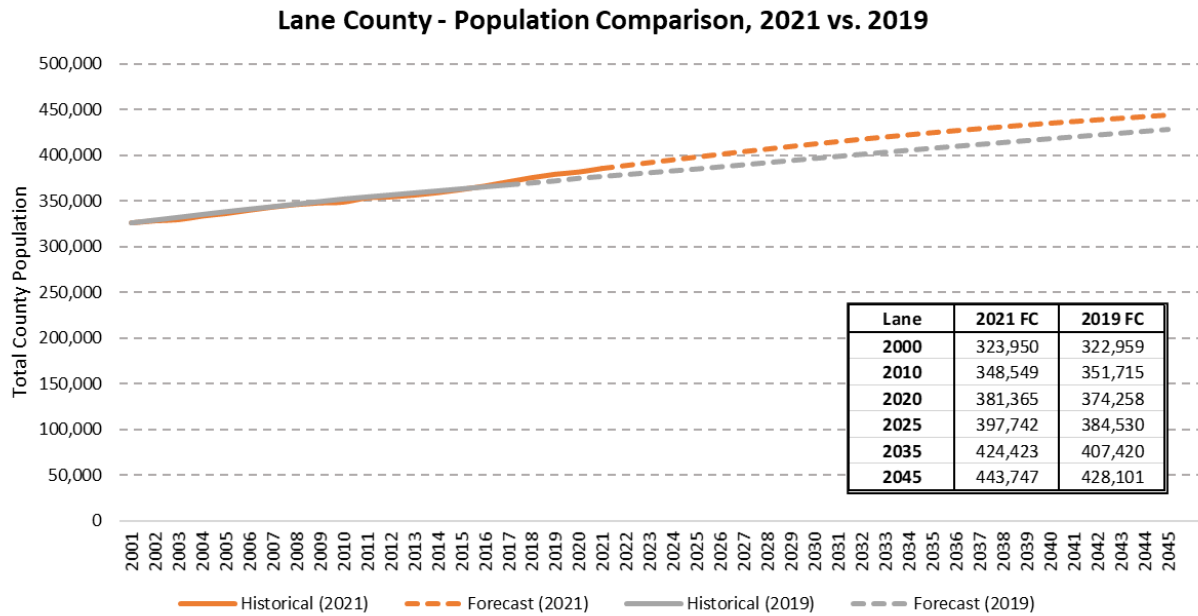
6. Appendix B: Detail Population Forecast Results

Age	2020	2021	2025	2030	2035	2040	2045
0-4	17,197	17,013	16,889	18,131	19,428	20,064	20,163
5-9	17,904	19,344	17,697	17,109	18,369	19,685	20,331
10-14	18,955	19,708	19,972	18,321	17,710	19,013	20,377
15-19	24,070	23,894	24,571	24,922	23,260	22,640	24,096
20-24	31,759	36,815	36,672	37,881	38,522	36,809	36,201
25-29	26,571	27,959	32,845	33,017	34,153	34,739	32,505
30-34	25,175	22,776	23,092	28,311	28,367	29,376	29,904
35-39	23,072	23,389	21,887	22,073	26,979	27,078	28,049
40-44	21,733	23,952	24,503	22,544	22,741	27,794	27,897
45-49	21,494	20,886	23,847	25,307	23,292	23,497	28,719
50-54	22,255	21,357	21,512	24,505	26,018	23,945	24,156
55-59	24,514	22,431	21,381	21,988	25,068	26,611	24,488
60-64	26,081	24,920	23,224	21,546	22,167	25,282	26,827
65-69	26,813	25,855	24,963	23,041	21,376	21,988	25,082
70-74	21,531	23,225	24,946	24,143	22,268	20,674	21,247
75-79	13,908	14,533	19,571	22,395	21,690	20,013	18,638
80-84	8,914	8,927	11,299	15,723	17,947	17,389	16,038
85+	9,418	8,245	8,869	11,086	15,069	18,250	19,029

Source: PRC Estimates, 2020; Forecast by Population Research Center (PRC).

7. Appendix C: Comparison of Current and Previous Forecast

To provide a better understanding of the changes since the last round of forecast for the Region 4 counties, this section compares the current 2021 total county population forecast to the population forecast published by the Population Research Center in 2017. The 2019 forecast of Lane County was used since Lane County was forecasted as part of the Region 2 counties in 2019.





Fern Ridge School District

Provide excellence for every student so that each will reach their greatest potential

Capital Facility Investments Community Planning Committee Recommendation



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Fern Ridge School District No. 28J

General Obligation
Bonds
Levy Rate and
Refunding Analysis

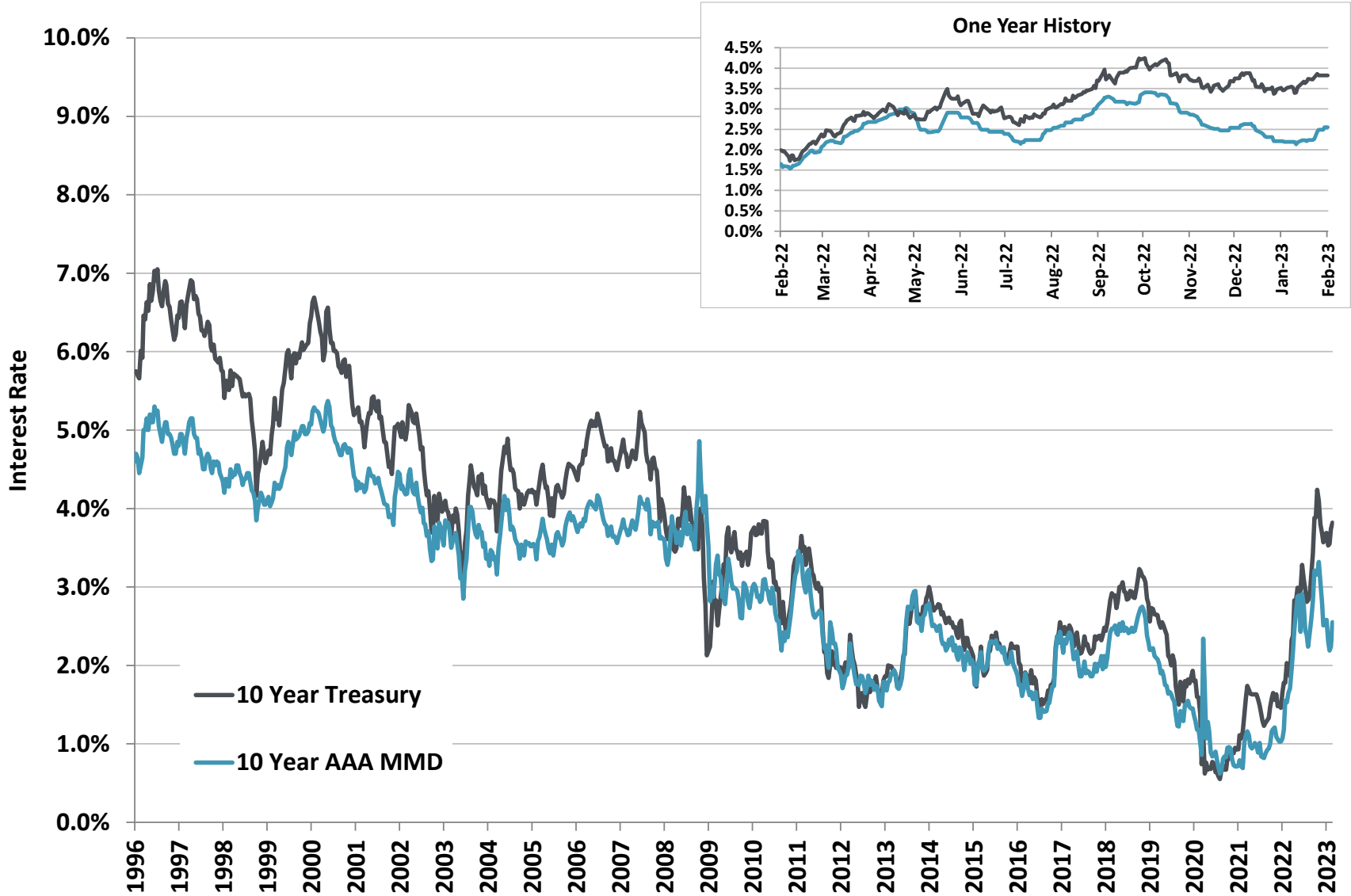
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February 23, 2022

HISTORICAL INTEREST RATES

10 Year Tax-Exempt (AAA MMD) vs. 10 Year Treasury Rates



FERN RIDGE SCHOOL DISTRICT NO. 28J

Historical Property Values

Fiscal Year	M5 Real Market		% RMV Growth	Total Assessed		Urban Renewal		% Net AV Growth
	Value			Value	Excess	Net Assessed Value		
2023	\$ 2,234,570,552		21.08%	\$ 1,181,770,660	\$ 64,990,550	\$ 1,116,780,110	4.63%	
2022	1,845,480,462		12.55%	1,129,101,802	61,731,390	1,067,370,412	4.20%	
2021	1,639,645,726		5.30%	1,079,638,482	55,326,861	1,024,311,621	4.13%	
2020	1,557,172,409		7.95%	1,036,828,504	53,144,089	983,684,415	3.81%	
2019	1,442,528,935		8.31%	997,241,872	49,645,509	947,596,363	3.76%	
2018	1,331,854,836		9.31%	959,805,439	46,591,320	913,214,119	4.32%	
2017	1,218,400,802		5.68%	921,329,931	45,974,890	875,355,041	3.79%	
2016	1,152,898,904		1.98%	887,210,197	43,779,905	843,430,292	3.58%	
2015	1,130,466,543		10.11%	857,879,490	43,572,270	814,307,220	4.91%	
2014	1,026,651,679		1.98%	816,013,724	39,815,160	776,198,564	2.92%	
2013	1,006,744,056		-4.79%	792,935,095	38,767,521	754,167,574	1.35%	
2012	1,057,421,957		-4.30%	782,531,233	38,418,778	744,112,455	3.05%	
2011	1,104,981,750		-16.26%	759,808,224	37,687,886	722,120,338	8.57%	
2010	1,319,492,886		-5.11%	703,829,553	38,711,622	665,117,931	3.42%	
2009	1,390,492,162		15.28%	678,800,338	35,646,687	643,153,651	5.65%	
2008	1,206,165,344		17.61%	640,556,867	31,811,257	608,745,610	6.26%	
2007	1,025,566,987		23.29%	601,909,401	29,021,609	572,887,792	7.37%	
2006	831,800,230		14.84%	561,382,957	27,803,889	533,579,068	6.41%	
2005	724,335,528		10.53%	527,759,793	26,339,913	501,419,880	6.99%	
2004	655,309,710		5.92%	493,155,905	24,493,434	468,662,471	3.21%	
2003	618,696,574		---	476,479,691	22,404,616	454,075,075	---	

Source: Lane and Douglas Counties Departments of Assessment and Taxation

Urban Renewal Excess

When urban renewal areas are created, they are designated as either “standard” or “reduced” rate plans and the type determines the assessed value against which general obligation bonds are levied. General obligation bonds cannot be levied on the

Urban Renewal Excess - 2023			
Plan Area	County	Amount	
REDUCED RATE			
Veneta Urban Renewal	Lane	\$	64,990,550
Total Reduced Rate Urban Renewal Excess:		\$	64,990,550
STANDARD RATE			
None	n.a.	\$	-
Total Standard Rate Urban Renewal Excess:		\$	-
TOTAL URBAN RENEWAL EXCESS		\$	64,990,550

excess assessed value in standard rate plan areas. Alternatively, general obligation bonds can be levied on the excess assessed value in reduced rate plan areas, if the bonds were approved at an election after October 6, 2001.

2023 Assessed Value for Bond Levies	
Total Assessed Value:	\$ 1,181,770,660
Less Standard Rate Urban Renewal Value:	-
Assessed Value (Bonds Approved After 10/06/01):	1,181,770,660
Less Reduced Rate Urban Renewal Value:	(64,990,550)
Net Assessed Value (Bonds Approved Before 10/06/01):	1,116,780,110

FERN RIDGE SCHOOL DISTRICT NO. 28J
Outstanding General Obligation Bonds

Purpose		Date of Issue	Date of Maturity	Amount Issued	Amount Outstanding
General Obligation Bonds:					
Series 2005	Advance refunding of 1998 & 1999 GO Bonds	03/22/05	06/15/16	\$ 6,740,000	\$ -
Series 2009	Advance refunding of remaining 1998 & 1999 GO Bonds	05/28/09	06/15/12	2,365,000	-
Series 2014A*	School renovations; safety & seismic improvements;	09/30/14	06/15/27	25,421,326	5,375,801
Series 2014B	technology	09/30/14	06/15/17	1,245,000	-
Series 2021	Partial advance refunding of Series 2014A GO Bonds.	10/21/21	06/15/36	22,080,000	21,575,000
Total General Obligation Bonds					<u>\$ 26,950,801</u>

*Refunded.

Legal General Obligation Debt Capacity

Real Market Value (Fiscal Year 2023)	\$ 2,234,570,552
Debt Capacity	
General Obligation Debt Capacity (7.95% of Real Market Value)	\$ 177,648,359
Less: Outstanding Debt Subject to Limit	<u>(26,950,801)</u>
Remaining General Obligation Debt Capacity	\$ 150,697,558
Percent of Capacity Issued	15.17%

FERN RIDGE SCHOOL DISTRICT NO. 28J

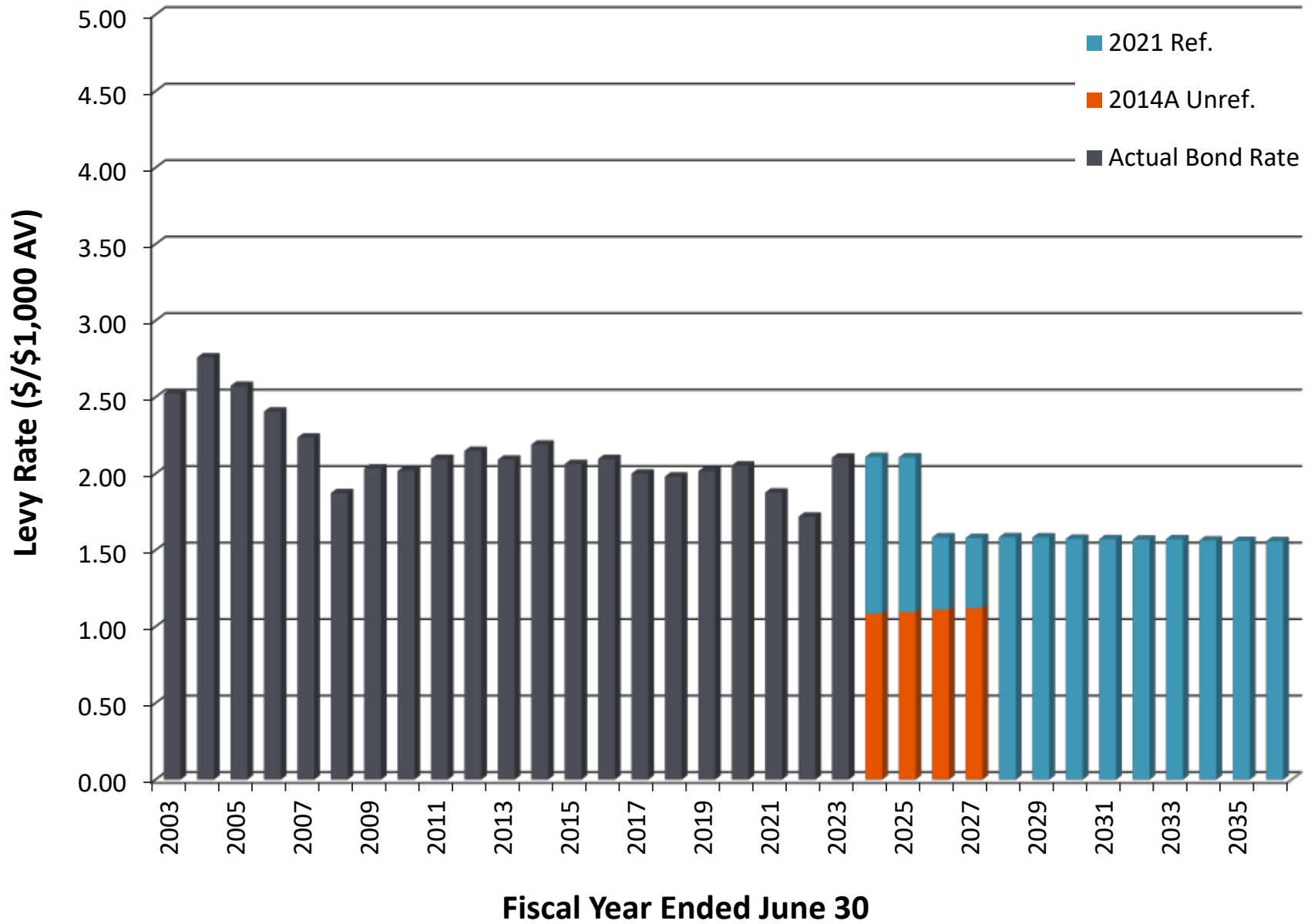
Outstanding General Obligation Bonds – Actual and Projected Levy Rates

Fiscal Year ⁽¹⁾	Outstanding General Obligation Bonds							Total Assessed Value	% Total AV Growth	Actual Bond Rate	Taxes Collected ⁽²⁾	Projected Bond Rate	
	Prior Bonds	2005 Bonds	2009 Bonds	Debt Service		2021 Ref.	Total						
				2014A Unref.	2014B Bonds								
2003	\$ 1,202,573	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,202,573	\$ 476,479,691	---	2.5238			
2004	1,238,030	-	-	-	-	-	1,238,030	493,155,905	3.50%	2.7598			
2005	1,122,269	145,688	-	-	-	-	1,267,957	527,759,793	7.02%	2.5739			
2006	1,008,630	280,675	-	-	-	-	1,289,305	561,382,957	6.37%	2.4056			
2007	1,044,955	280,075	-	-	-	-	1,325,030	601,909,401	7.22%	2.2355			
2008	1,087,963	279,475	-	-	-	-	1,367,438	640,556,867	6.42%	1.8725			
2009	1,129,238	278,875	-	-	-	-	1,408,113	678,800,338	5.97%	2.0338			
2010	-	288,275	1,144,483	-	-	-	1,432,758	703,829,553	3.69%	2.0175			
2011	-	787,375	689,175	-	-	-	1,476,550	759,808,224	7.95%	2.0961			
2012	-	888,163	634,375	-	-	-	1,522,538	782,531,233	2.99%	2.1484			
2013	-	1,594,600	-	-	-	-	1,594,600	792,935,095	1.33%	2.0911			
2014	-	1,639,400	-	-	-	-	1,639,400	816,013,724	2.91%	2.1896			
2015	-	1,605,200	-	-	-	79,538	1,684,738	857,879,490	5.13%	2.0625			
2016	-	1,040,000	-	-	-	750,700	1,790,700	887,210,197	3.42%	2.0956			
2017	-	-	-	1,322,300	504,400	-	1,826,700	921,329,931	3.85%	2.0001			
2018	-	-	-	1,882,300	-	-	1,882,300	959,805,439	4.18%	1.9809			
2019	-	-	-	1,939,900	-	-	1,939,900	997,241,872	3.90%	2.0160			
2020	-	-	-	1,989,300	-	-	1,989,300	1,036,828,504	3.97%	2.0531			
2021	-	-	-	2,035,700	-	-	2,035,700	1,079,638,482	4.13%	1.8764			
2022	-	-	-	1,180,600	-	790,554	1,971,154	1,129,101,802	4.58%	1.7183			
Latest	2023	-	-	-	1,230,600	-	1,142,763	2,373,363	1,181,770,660	4.66%	2.1041		
Projected	2024	-	-	-	1,287,200	-	1,215,035	2,502,235	1,217,223,780	3.00%	97.5%	2.11	
	2025	-	-	-	1,340,000	-	1,234,263	2,574,263	1,253,740,493	3.00%	97.5%	2.11	
	2026	-	-	-	1,397,500	-	595,569	1,993,069	1,291,352,708	3.00%	97.5%	1.58	
	2027	-	-	-	1,454,250	-	593,347	2,047,597	1,330,093,289	3.00%	97.5%	1.58	
	2028	-	-	-	-	-	2,115,624	2,115,624	1,369,996,088	3.00%	97.5%	1.58	
	2029	-	-	-	-	-	2,177,472	2,177,472	1,411,095,971	3.00%	97.5%	1.58	
	2030	-	-	-	-	-	2,229,840	2,229,840	1,453,428,850	3.00%	97.5%	1.57	
	2031	-	-	-	-	-	2,293,409	2,293,409	1,497,031,715	3.00%	97.5%	1.57	
	2032	-	-	-	-	-	2,358,059	2,358,059	1,541,942,667	3.00%	97.5%	1.57	
	2033	-	-	-	-	-	2,433,069	2,433,069	1,588,200,947	3.00%	97.5%	1.57	
	2034	-	-	-	-	-	2,492,623	2,492,623	1,635,846,975	3.00%	97.5%	1.56	
	2035	-	-	-	-	-	2,562,345	2,562,345	1,684,922,384	3.00%	97.5%	1.56	
	2036	-	-	-	-	-	2,636,640	2,636,640	1,735,470,056	3.00%	97.5%	1.56	

(1) Fiscal years ended June 30.

(2) Assumes collection year delinquencies will be offset by back tax collections.

FERN RIDGE SCHOOL DISTRICT NO. 28J
 Outstanding General Obligation Bonds – Actual and Projected Levy Rates



FERN RIDGE SCHOOL DISTRICT NO. 28J

General Obligation Bonds, Series 2024 – Summary of Structuring Scenarios

	10 Year Amortization	15 Year Amortization			
Total Par Amount	\$ 6,270,000	\$ 12,830,000			
Capitalized Interest Fund	(194,781)	(630,175)			
Total Bond Proceeds	\$ 6,075,219	\$ 12,199,825			
Dated Date	6/15/2024	6/15/2024			
Final Maturity	6/15/2034	6/15/2039			
Amortization Period	10 Years	15 Years			
Projected Average Levy Rates*					
	Prior Debt	New Bonds	Combined ⁽¹⁾	New Bonds	Combined ⁽¹⁾
2023.....	\$ 2.10	\$ -	\$ 2.10	\$ -	\$ 2.10
2024.....	2.11	-	2.11	-	2.11
2025.....	2.11	0.10	2.20	0.10	2.20
2026-2034.....	1.58	0.63	2.20	0.63	2.20
2035-2036.....	1.56	-	1.56	0.64	2.20
2037-2039.....	-	-	-	2.20	2.20
Interest Estimates					
Cushion over Current Interest Rates	+2%		+2%		
True Interest Cost (TIC)**	5.08%		5.94%		
Total Interest	\$2,062,592		\$9,949,700		
Total Interest as % of Par	33%		78%		

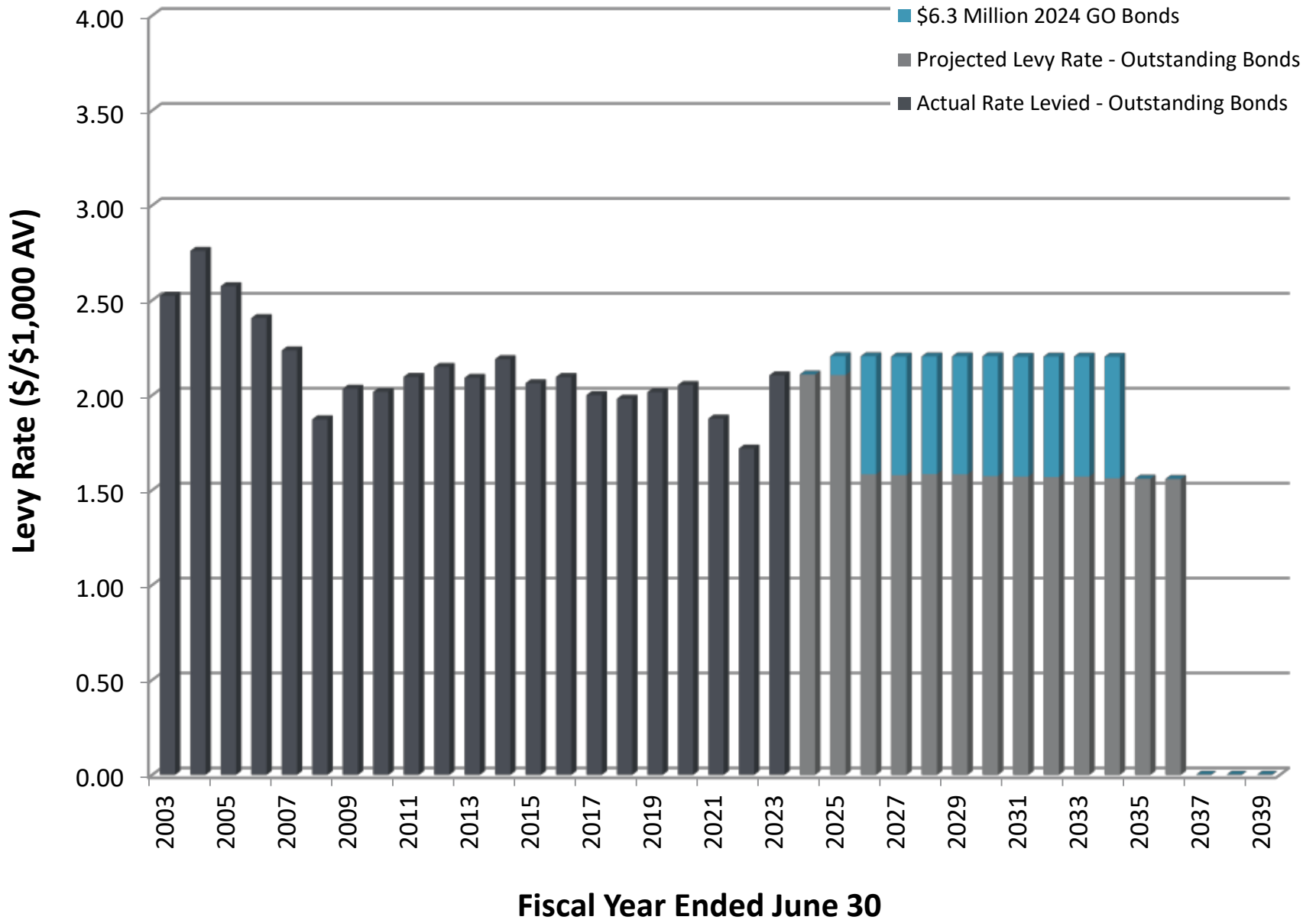
(1) Total doesn't foot because of rounding.

* Projected average levy rates are based on a variety of assumptions regarding AV growth, tax collections & interest rates. Debt service will be fixed when bonds are sold but levy rates are preliminary until the assessor certifies values each year.

** True interest cost is the blended, overall interest rate for the issue. Includes the interest rate cushion.

FERN RIDGE SCHOOL DISTRICT NO. 28J

General Obligation Bonds, Series 2024 – 10 Years, \$2.20 Maximum Levy, Capitalized Interest Fund



Fern Ridge School District No. 28J
\$6,270,000
General Obligation Bonds, Series 2024
Projected Bond Levy Rates
10 Year Issue

Bond Issue Data		2023 Property Tax Data (000s)	
Dated Date:	06/15/2024	Total Assessed Value:	\$ 1,181,771
First Coupon:	12/15/2024	Less Standard Rate Urban Renewal Value:	-
Final Maturity:	06/15/2034	Assessed Value (Bonds Approved After 2001):	\$ 1,181,771
Term (years):	10.00	Less Reduced Rate Urban Renewal Value:	64,991
Current Market Rates Plus:	2.00%	Net Assessed Value (Bonds Approved Before 2001):	\$ 1,116,780

Summary				Structuring Assumptions			
Issue Amount:			\$ 6,270,000	AV Growth		New Bonds Tax Collections ⁽¹⁾	
Current Interest Bonds	100%		\$ 6,270,000	2024	3.00%	2025	95.0%
Convertible Deferred Interest Bonds	0%		\$ -	2025	3.00%	2026	95.0%
				2026	3.00%	2027	97.5%
Total Interest Cost:			\$ 2,062,592	2027	3.00%	2028	97.5%
Interest Cost as a Percent of Par:			33%	Thereafter	3.00%	Thereafter	97.5%

Fiscal Year Ending 6/30	AV for New Bond Levies (000s)	Estimated Debt Service Requirements			Projected Levy Rates ⁽¹⁾		
		Total		FY Total	\$/1,000 AV		
		Prior Debt	New Bonds		Prior Debt ⁽²⁾	New Bonds	Combined Levy Rate
2023	\$ 1,181,771	\$ 2,373,363	\$ -	\$ 2,373,363	\$ 2.10	\$ -	\$ 2.10
2024	1,217,224	2,502,235	-	2,502,235	2.11	-	2.11
2025	1,253,740	2,574,263	117,897	2,692,161	2.11	0.10	2.20
2026	1,291,353	1,993,069	762,679	2,755,748	1.58	0.62	2.20
2027	1,330,093	2,047,597	809,234	2,856,830	1.58	0.62	2.20
2028	1,369,996	2,115,624	828,026	2,943,649	1.58	0.62	2.20
2029	1,411,096	2,177,472	854,945	3,032,417	1.58	0.62	2.20
2030	1,453,429	2,229,840	894,255	3,124,095	1.57	0.63	2.20
2031	1,497,032	2,293,409	920,376	3,213,785	1.57	0.63	2.20
2032	1,541,943	2,358,059	953,551	3,311,610	1.57	0.63	2.20
2033	1,588,201	2,433,069	977,961	3,411,030	1.57	0.63	2.20
2034	1,635,847	2,492,623	1,018,888	3,511,511	1.56	0.64	2.20
2035	1,684,922	2,562,345	-	2,562,345	1.56	-	1.56
2036	1,735,470	2,636,640	-	2,636,640	1.56	-	1.56
2037	1,787,534	-	-	-	-	-	-
2038	1,841,160	-	-	-	-	-	-
2039	1,896,395	-	-	-	-	-	-
		\$ 32,789,607	\$ 8,137,811				

(1) Includes estimated delinquencies. Beginning in FY 2027 assumes collection year delinquencies will be offset by back tax collections.

(2) 2023 prior debt rate shown is actual rate levied.

Fern Ridge School District No. 28J
Projected Debt Service Schedule
\$6,270,000
General Obligation Bonds, Series 2024
10 Year Issue

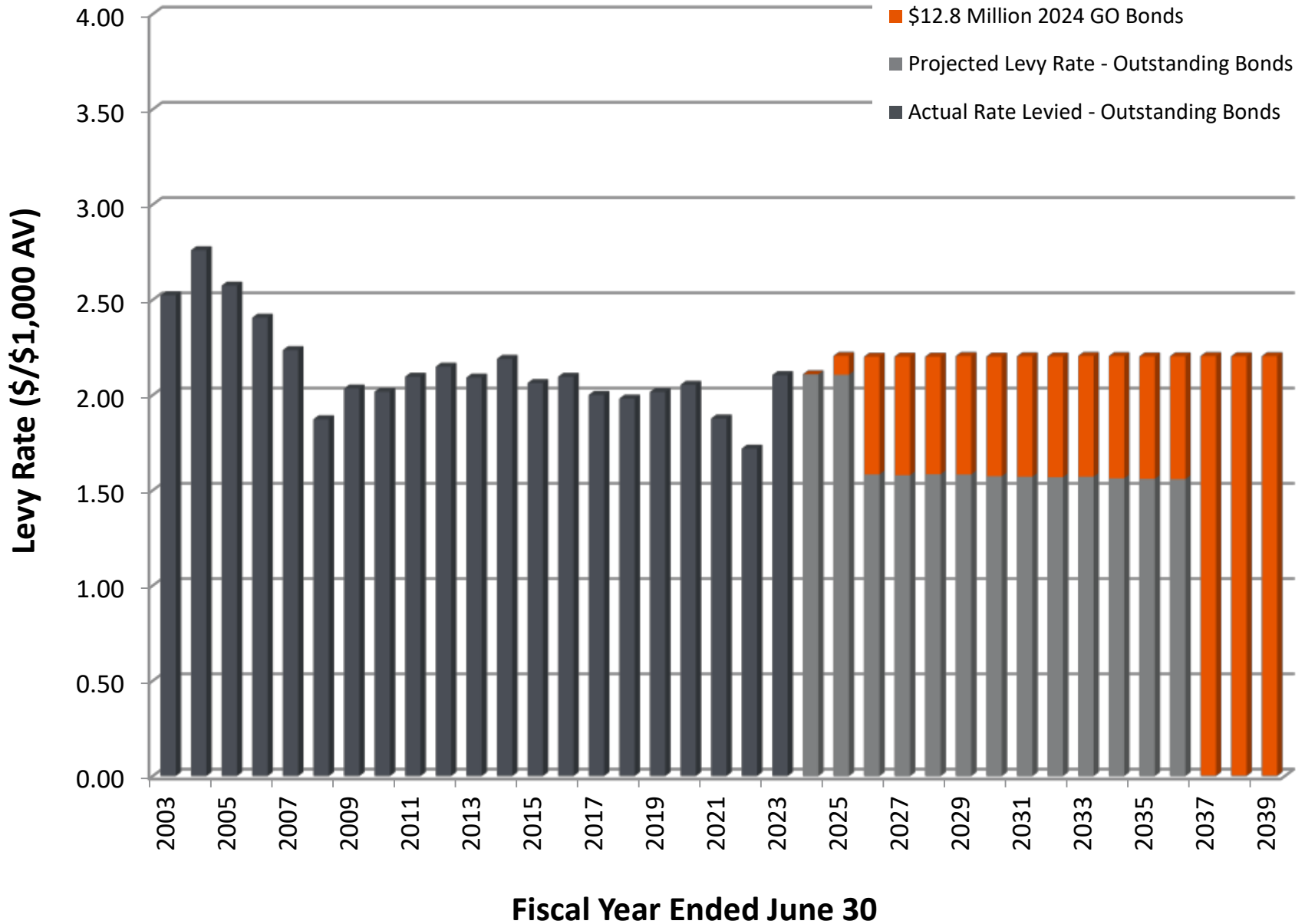
Payment Date	Principal	Coupon	Interest	Capitalized Interest	Total Net Debt Service	FY Total	Estimated (1) Delinquencies	Estimated (2) Amount to Levy
12/15/2024			\$ 156,339	\$ (156,339)	\$ -	\$ -	\$ -	\$ -
06/15/2025			156,339	(38,442)	117,897	117,897	6,205	124,103
12/15/2025			156,339		156,339			
06/15/2026	450,000	5.21%	156,339		606,339	762,679	40,141	802,819
12/15/2026			144,617		144,617			
06/15/2027	520,000	5.04%	144,617		664,617	809,234	20,750	829,983
12/15/2027			131,513		131,513			
06/15/2028	565,000	4.97%	131,513		696,513	828,026	21,231	849,257
12/15/2028			117,473		117,473			
06/15/2029	620,000	4.95%	117,473		737,473	854,945	21,922	876,867
12/15/2029			102,128		102,128			
06/15/2030	690,000	4.91%	102,128		792,128	894,255	22,930	917,185
12/15/2030			85,188		85,188			
06/15/2031	750,000	4.91%	85,188		835,188	920,376	23,599	943,975
12/15/2031			66,776		66,776			
06/15/2032	820,000	4.95%	66,776		886,776	953,551	24,450	978,001
12/15/2032			46,481		46,481			
06/15/2033	885,000	4.98%	46,481		931,481	977,961	25,076	1,003,037
12/15/2033			24,444		24,444			
06/15/2034	970,000	5.04%	24,444		994,444	1,018,888	26,125	1,045,013
Total	\$ 6,270,000		\$ 2,062,592	\$ (194,781)	\$ 8,137,811	\$ 8,137,811	\$ 232,429	\$ 8,370,240

(1) Beginning in FY 2027 assumes collection year delinquencies will be offset by back tax collections.

(2) Actual levy amount should be calculated annually based on County's current delinquency rates, actual debt service requirements and debt service fund balance, if any.

FERN RIDGE SCHOOL DISTRICT NO. 28J

General Obligation Bonds, Series 2024 – 15 Years, \$2.20 Maximum Levy, Capitalized Interest Fund



Fern Ridge School District No. 28J
\$12,830,000
General Obligation Bonds, Series 2024
Projected Bond Levy Rates
15 Year Issue

Bond Issue Data		2023 Property Tax Data (000s)	
Dated Date:	06/15/2024	Total Assessed Value:	\$ 1,181,771
First Coupon:	12/15/2024	Less Standard Rate Urban Renewal Value:	-
Final Maturity	06/15/2039	Assessed Value (Bonds Approved After 2001):	\$ 1,181,771
Term (years):	15.00	Less Reduced Rate Urban Renewal Value:	64,991
Current Market Rates Plus:	2.00%	Net Assessed Value (Bonds Approved Before 2001):	\$ 1,116,780

Summary		Structuring Assumptions			
Issue Amount:	\$ 12,830,000	<u>AV Growth</u>		<u>New Bonds Tax Collections⁽¹⁾</u>	
Current Interest Bonds	100% \$ 12,830,000	2024	3.00%	2025	95.0%
Convertible Deferred Interest Bonds	0% \$ -	2025	3.00%	2026	95.0%
Total Interest Cost:	\$ 9,949,700	2026	3.00%	2027	97.5%
Interest Cost as a Percent of Par:	78%	2027	3.00%	2028	97.5%
		Thereafter	3.00%	Thereafter	97.5%

Fiscal Year Ending 6/30	AV for New Bond Levies (000s)	Estimated Debt Service Requirements			Projected Levy Rates ⁽¹⁾ \$/1,000 AV		
		Total		FY Total	Prior Debt ⁽²⁾	New Bonds	Combined Levy Rate
		Prior Debt	New Bonds				
2023	\$ 1,181,771	\$ 2,373,363	\$ -	\$ 2,373,363	\$ 2.10	\$ -	\$ 2.10
2024	1,217,224	2,502,235	-	2,502,235	2.11	-	2.11
2025	1,253,740	2,574,263	117,897	2,692,161	2.11	0.10	2.20
2026	1,291,353	1,993,069	758,072	2,751,141	1.58	0.62	2.20
2027	1,330,093	2,047,597	807,551	2,855,148	1.58	0.62	2.20
2028	1,369,996	2,115,624	824,527	2,940,151	1.58	0.62	2.20
2029	1,411,096	2,177,472	855,551	3,033,023	1.58	0.62	2.20
2030	1,453,429	2,229,840	889,859	3,119,699	1.57	0.63	2.20
2031	1,497,032	2,293,409	922,248	3,215,657	1.57	0.63	2.20
2032	1,541,943	2,358,059	952,674	3,310,733	1.57	0.63	2.20
2033	1,588,201	2,433,069	981,041	3,414,110	1.57	0.63	2.20
2034	1,635,847	2,492,623	1,022,346	3,514,969	1.56	0.64	2.20
2035	1,684,922	2,562,345	1,055,714	3,618,059	1.56	0.64	2.20
2036	1,735,470	2,636,640	1,090,714	3,727,354	1.56	0.64	2.20
2037	1,787,534	-	3,841,637	3,841,637	-	2.20	2.20
2038	1,841,160	-	3,955,003	3,955,003	-	2.20	2.20
2039	1,896,395	-	4,074,690	4,074,690	-	2.20	2.20
		\$ 32,789,607	\$ 22,149,526				

(1) Includes estimated delinquencies. Beginning in FY 2027 assumes collection year delinquencies will be offset by back tax collections.

(2) 2023 prior debt rate shown is actual rate levied.

Fern Ridge School District No. 28J
Projected Debt Service Schedule
\$12,830,000
General Obligation Bonds, Series 2024
15 Year Issue

Payment Date	Principal	Coupon	Interest	Capitalized Interest	Total Debt Service	FY Total	Estimated (1) Delinquencies	Estimated (2) Amount to Levy
12/15/2024			\$ 374,036	\$ (374,036)	\$ -	\$ -	\$ -	\$ -
06/15/2025			374,036	(256,139)	117,897	117,897	6,205	124,103
12/15/2025			374,036		374,036			
06/15/2026	10,000	5.21%	374,036		384,036	758,072	39,899	797,971
12/15/2026			373,776		373,776			
06/15/2027	60,000	5.04%	373,776		433,776	807,551	20,706	828,258
12/15/2027			372,264		372,264			
06/15/2028	80,000	4.97%	372,264		452,264	824,527	21,142	845,669
12/15/2028			370,276		370,276			
06/15/2029	115,000	4.95%	370,276		485,276	855,551	21,937	877,488
12/15/2029			367,429		367,429			
06/15/2030	155,000	4.91%	367,429		522,429	889,859	22,817	912,676
12/15/2030			363,624		363,624			
06/15/2031	195,000	4.91%	363,624		558,624	922,248	23,647	945,896
12/15/2031			358,837		358,837			
06/15/2032	235,000	4.95%	358,837		593,837	952,674	24,428	977,101
12/15/2032			353,021		353,021			
06/15/2033	275,000	4.98%	353,021		628,021	981,041	25,155	1,006,196
12/15/2033			346,173		346,173			
06/15/2034	330,000	5.04%	346,173		676,173	1,022,346	26,214	1,048,560
12/15/2034			337,857		337,857			
06/15/2035	380,000	5.26%	337,857		717,857	1,055,714	27,070	1,082,784
12/15/2035			327,857		327,857			
06/15/2036	435,000	5.53%	327,857		762,857	1,090,714	27,967	1,118,681
12/15/2036			315,818		315,818			
06/15/2037	3,210,000	5.81%	315,818		3,525,818	3,841,637	98,504	3,940,140
12/15/2037			222,502		222,502			
06/15/2038	3,510,000	5.99%	222,502		3,732,502	3,955,003	101,410	4,056,413
12/15/2038			117,345		117,345			
06/15/2039	3,840,000	6.11%	117,345		3,957,345	4,074,690	104,479	4,179,169
Total	\$ 12,830,000		\$ 9,949,700	\$ (630,175)	\$ 22,149,526	\$ 22,149,526	\$ 591,579	\$ 22,741,105

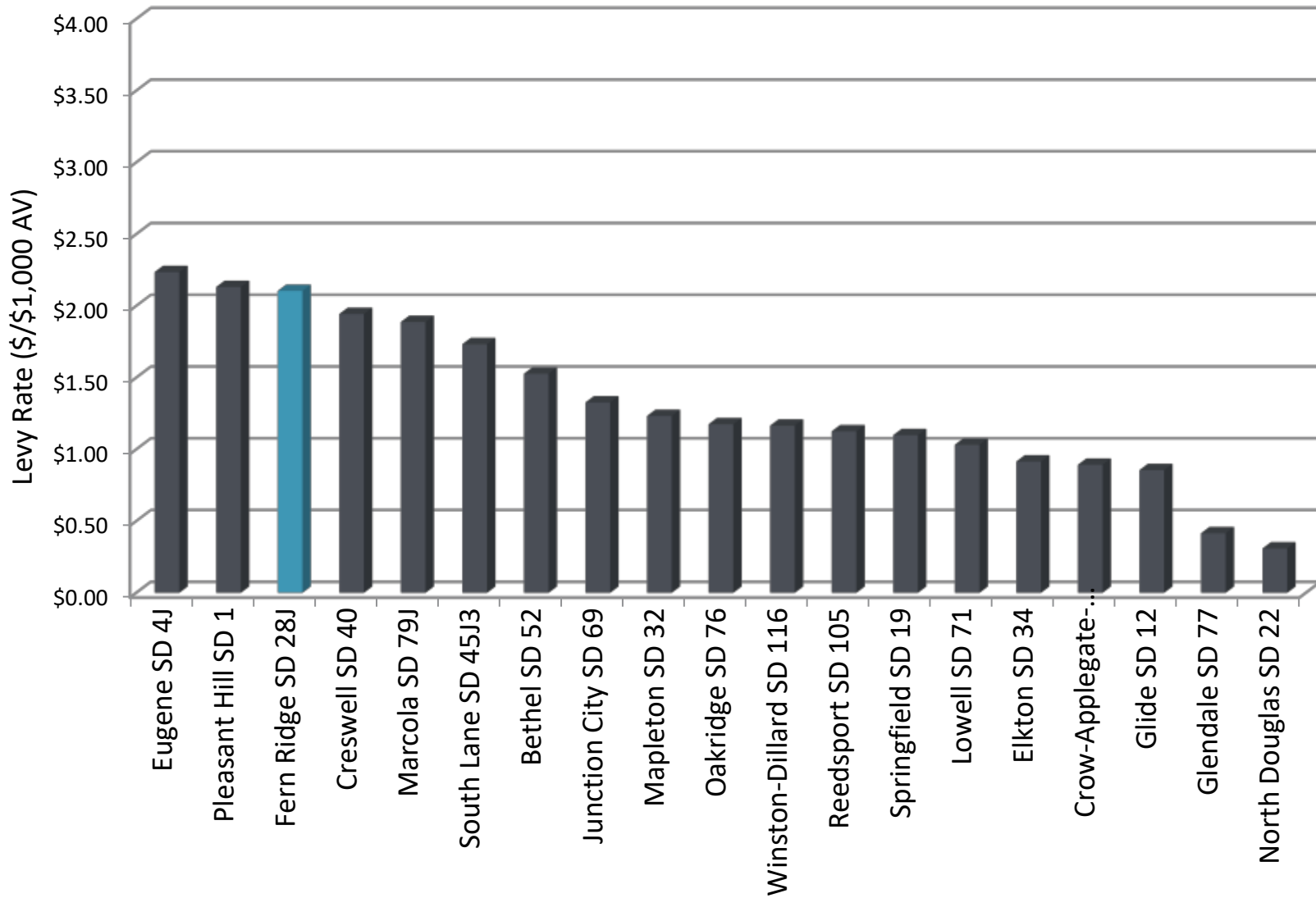
(1) Beginning in FY 2027 assumes collection year delinquencies will be offset by back tax collections.

(2) Actual levy amount should be calculated annually based on County's current delinquency rates, actual debt service requirements and debt service fund balance, if any.

FERN RIDGE SCHOOL DISTRICT NO. 28J
School District Levy Rates in Neighboring Districts

District	2023 Extended ADMw	Assessed Value (Net of Urban Renewal)	2023 Levy Rates			
			Permanent Rate	Local Option Rate	Bond Rate	Total District Rate
Eugene SD 4J	19,404.20	17,849,021,718	4.7485	1.5000	2.2353	8.4838
Crow-Applegate-Lorane SD 66	396.59	302,612,612	4.9255	1.5000	0.8922	7.3177
Fern Ridge SD 28J	1,678.68	1,116,780,110	4.8240	-	2.1041	6.9281
Pleasant Hill SD 1	1,081.21	768,824,964	4.6414	-	2.1313	6.7727
Creswell SD 40	1,342.06	852,521,169	4.6426	-	1.9432	6.5858
Marcola SD 79J	1,006.64	227,778,431	4.6687	-	1.8877	6.5564
South Lane SD 45J3	3,400.62	1,835,862,751	4.7532	-	1.7328	6.4860
Mapleton SD 32	279.12	167,324,389	4.8917	-	1.2325	6.1242
Lowell SD 71	1,458.21	291,663,035	5.0409	-	1.0320	6.0729
Bethel SD 52	6,182.53	4,294,557,188	4.5067	-	1.5270	6.0337
Oakridge SD 76	728.29	317,773,236	4.8223	-	1.1746	5.9969
Junction City SD 69	1,917.31	1,394,317,849	4.5604	-	1.3268	5.8872
Springfield SD 19	11,671.80	6,870,604,054	4.6412	-	1.0987	5.7399
Winston-Dillard SD 116	1,633.33	862,595,461	4.3994	-	1.1650	5.5644
Reedsport SD 105	882.12	572,485,452	4.3788	-	1.1254	5.5042
Glide SD 12	880.08	1,115,791,556	4.5037	-	0.8551	5.3588
Elkton SD 34	404.42	211,960,533	4.3624	-	0.9152	5.2776
Glendale SD 77	440.69	249,206,893	4.7431	-	0.4149	5.1580
Blachly SD 90	524.04	73,222,030	5.1023	-	-	5.1023
North Douglas SD 22	483.17	240,065,701	4.7844	-	0.3090	5.0934
Days Creek SD 15	379.87	123,165,816	4.8367	-	-	4.8367
South Umpqua SD 19	1,691.21	856,109,989	4.7091	-	-	4.7091
Camas Valley SD 21J	372.22	72,710,630	4.6977	-	-	4.6977
McKenzie SD 68	325.44	404,211,439	4.6915	-	-	4.6915
Yoncalla SD 32	426.60	260,778,525	4.6884	-	-	4.6884
Riddle SD 70	468.27	326,046,870	4.6635	-	-	4.6635
Siuslaw SD 97J	1,242.62	2,204,317,936	3.8928	0.7500	-	4.6428
Oakland SD 1	767.63	368,713,114	4.6397	-	-	4.6397
Sutherlin SD 130	1,517.23	850,723,151	4.0815	-	-	4.0815
Roseburg SD 4	6,510.13	4,966,261,622	4.0327	-	-	4.0327

2023 School District Bond Rates



We are writing or providing this material to provide you with certain regulatory disclosures as required by the Municipal Securities Rulemaking Board. As part of our services, Piper Sandler may provide advice concerning the structure, timing, terms, and other similar matters concerning an issue of municipal securities that Piper Sandler is underwriting or placing. However, Piper Sandler intends to serve as an underwriter or placement agent and not as a financial advisor to you in this transaction; and the primary role of Piper Sandler is to purchase securities for resale to investors or arrange for the placement of securities in an arm's-length commercial transaction between you and Piper Sandler. Piper Sandler has financial and other interests that differ from your interests.



FERN RIDGE SCHOOL DISTRICT 28J
School Board Meeting Minutes

REGULAR MEETING of the FERN RIDGE SCHOOL BOARD

June 26, 2023

Zoom Webinar & In-Person Meeting
88834 Territorial Rd.
Elmira, Or 97437

CALL TO ORDER (Agenda Item 1): The regular meeting of the Fern Ridge School Board was called to order by Chair Boren at 6:30 pm.

In attendance were Directors Mark Boren, Andrea Larson, Barbara Graham-Adams, Lorrie Daniels, Business Manager Quanah Bennett, and Superintendent Gary Carpenter.

Director Jackie Turle was absent.

CITIZENSHIP AWARD (Agenda Item 2): The June Citizenship Award was presented to Iris Frome. Iris is an outstanding student with a GPA over 4.0 and is currently the highest-ranked student in the class of 2024. She has maintained these grades despite constantly challenging herself with upper-level classes. Iris is a three-sport athlete excelling in cross country, basketball, and track.

FLAG SALUTE (Agenda Item 3): Chair Boren led the flag salute.

PUBLIC COMMENT (Agenda Item 4): Community member Jolene Dugan thanked the outgoing board members and voiced concerns over the misinformation being shared on social media about the district.

MONTHLY ITEMS (Agenda Item 5):

5. A. Approval of Minutes: The minutes from the May 15, 2023 regular board meeting were presented for approval.

Director Graham-Adams moved to approve the May 15, 2023 minutes as written; seconded by Director Daniels. There was no discussion. The motion carried with Directors Boren, Larson, Graham-Adams, and Daniels voting yes. 4-0.

BUSINESS OFFICE (Agenda Item 6):

6. A. May 1, 2023 Enrollment Report: Business Manager Quanah Bennett reviewed the current enrollment report.

The district ended the 2022-2023 school year with the exact same enrollment as last June: 1,288

students.

Enrollment was down 52 students from the proposed budget, which was closer than the previous year when the district was 100 students below projected enrollment.

There was a time of discussion on Veneta and Elmira Elementary enrollment and the ways the district tries to balance aide time. A K-2, 3-5 model would be a path to solving this problem, but it does create some problems for parents who have kids split into different buildings.

6.B. General Fund Revenue and Expenditure Report: Business Manager Quannah Bennett reviewed the financial report as of May 31, 2023.

This district has received 102% of operating revenue, which is similar to this time last year.

Expenditures were at 77%, which is slightly above where the district was at this same time last year. This was anticipated as the district had a normal operating year in 2022-2023.

A debit in the state school fund line is due to a journal entry to create deferred revenue for the timber funds that were received. Those funds will be taken back by the state in 2023-2024.

Director Larson moved to accept the General Fund Revenue and Expenditure Report as written; seconded by Director Daniels. There was no discussion. The motion carried with Directors Boren, Larson, Graham-Adams, and Daniels voting yes. 4-0.

REPORTS (Agenda Item 7):

7. A. Superintendent's Report: Superintendent Carpenter reported on the following topics:

- **Bargaining:** An agreement was reached on all articles of interest and the financials for OSEA. The district and FREA opened up the contract for financial bargaining only. There will be no union bargaining in the 2023-2024 school year. Mr. Carpenter thanked Jackie Turle for serving as the school board representative on the FRSD/OSEA bargaining committee.
- **West Lane Tech:** The five-year contract with WLT will be up for renewal in the 2023-2024 year.
- **Summer Projects:** There are several projects underway for the summer, including carpet replacement, siding replacement, grandstand removal, and refinishing the high school gym floor.
- **Legislative Update:** The legislature ended yesterday afternoon with lots of bills that will impact schools, including the early literacy grant requiring a 25% local match, abbreviated school days for out-of-district placement learning minutes, and the reduction of middle school physical education requirements.

2023-2024 BUDGET ADOPTION (Agenda Item 8):

8. A. Open Public Meeting: Chair Boren opened the public meeting on the 2023-2024 budget.

8. B. Comments: there were no public comments at this time.

8. C. Close Public Meeting: Chair Boren closed the public meeting on the 2023-2024 budget.

8.D. Resolution #22-23/12 Adopt 2023-2024 Budget, Make Appropriations, Impose Taxes, and Categorizing the Tax:

Director Larson moved to approve resolution 22-23/12 in the amount of \$39,563,295 with a tax at a rate per \$1,000 of assessed value of \$4.8240 for the amount of \$2,586,999 for debt service for general obligation bonds: seconded by Director Graham-Adams. There was no discussion. The motion carried with Directors Boren, Larson, Graham-Adams, and Daniels voting yes. 4-0.

DISCUSSION ITEMS (Agenda Item 9):

9. A. Alliant Update: Brad Stiltner spoke with the board about the contract and assistance Alliant Systems will provide for the 2023-2024 school year. They will be assisting district maintenance staff in maintaining the environment systems district-wide.

There was a time of discussion about the scope of maintenance needed to keep the systems running properly.

9. B. Approve 2023-2027 Agreement with Oregon School Employees Association: The agreement between the district and OSEA was presented for approval. The financial package is competitive with Fern Ridge being the only district in Lane County to offer vacation pay for classified employees and a higher insurance contribution than most districts in the area.

Agreed to 3.9, 3.9, 3.9 year one the increase was a set dollar amount which equaled approximately 9 – 11% increase depending on step placement.

Director Daniels moved to approve the Oregon School Employees Association Fern Ridge Chapter 35 and Lane County School District 278]: seconded by Director Larson. There was no discussion. The motion carried with Directors Boren, Larson, Graham-Adams, and Daniels voting yes. 4-0.

9. C. Proposed 2023-2024 Board Meeting Calendar: The board reviewed the proposed 2023-2024 board meeting schedule.

Director Larson moved to approve the 2023-2024 board meeting calendar as published: seconded by Director Graham-Adams. There was no discussion. The motion carried with Directors Boren, Larson, Graham-Adams, and Daniels voting yes. 4-0.

9. D. Math Curriculum Adoption: Director of K12 Programs Michelle Marshall spoke with the board about the process of choosing new math curriculum K-12. Teacher representatives from each building have been reviewing curriculum and attending micro professional development

trainings for the past several months. The chosen curriculum was made public in May and was opened up for public comment. There was one comment left from a member of the public on the community engagement feedback form.

K – 5 chose Savva Learning. 6-8 chose MidSchool Math, and 9-12 chose OpenUp Resources.

The 9-12 curriculum will continue to be a work in progress as the Oregon Department of Education continues to refine best practices for the 2+1 framework.

Director Larson moved to approve all of the math curriculum K-12: seconded by Director Daniels. There was no further discussion. The motion carried with Directors Boren, Larson, Graham-Adams, and Daniels voting yes. 4-0.

9. E. New EHS Curriculum Approval: The board reviewed the new curriculum that was presented. This included Criminology and Mythology A & B.

Director Graham-Adams moved to approve the new curriculum Criminology and Mythology A & B as stated: seconded by Director Larson. There was no further discussion. The motion carried with Directors Boren, Larson, Graham-Adams, and Daniels voting yes. 4-0.

9. F. Breakfast/Lunch Pricing: Pre-COVID, this process happened each year. As the federal free lunch program is ending, it is time to adjust the adult meal prices are set so that the revenue is sufficient to cover the cost of the meal. Price increases happen in .10 increments. Once the 23-24 reimbursement rates are released, the District may need to contribute non-federal funds to cover the remaining price difference.

9. A. Approve 2023-2024 Alternate Education Programs: The board reviewed the list of approved alternative education programs. These programs are evaluated by assigned Lane County Superintendents and are used for out-of-district placement. Placements are determined by the Individual Education Plan/school teams and parent requests.

Director Larson moved to approve the alternate education programs for the 2023-2024 school year; seconded by Director Daniels. There was no further discussion. The motion carried with Directors Boren, Larson, Graham-Adams, and Daniels voting yes. 4-0.

PERSONNEL (Agenda Item10):

10. A. Licensed Employees Resignations/New hires/Transfers/Other:

Hiring of Billie Perrier, 1.0 FTE Principal at Elmira Elementary School, effective July 1, 2023.

Hiring of Aaron Franklin, 1.0 FTE Teacher at Elmira Elementary School, effective August 23, 2023.

Hiring of Elizabeth Booth, 1.0 FTE Teacher at Veneta Elementary School, effective August 23, 2023.

Hiring of Shahaley Holzgang, 1.0 FTE Teacher at Elmira Elementary School, effective August 23, 2023.

Hiring of Garren Piccolo, 1.0 FTE Teacher at Fern Ridge Middle School, effective August 23, 2023.

Hiring of Cydney Vandercar, Temporary 1-Year Principal at Elmira High school, effective July 17, 2023.

Resignation of Rick Gardner, 1.0 FTE Principal at Elmira High School, effective June 23, 2023.

Resignation of Chanda Diekotto, 1.0 FTE Teacher at Fern Ridge Middle School, effective June 19, 2023.

Resignation of Cassie Colon, .75 English Language Development Teacher, effective June 19, 2023.

Resignation of Emilee Russell, 1.0 FTE Teacher at Elmira Elementary School, effective June 19, 2023.

Resignation of Cassandra Day, 1.0 FTE Counselor at Fern Ridge Middle School, effective June 20, 2023.

Director Larson moved to approve the hiring and resignations of the licensed employees as listed; seconded by Director Graham-Adams. There was no discussion. The motion carried with Directors Boren, Larson, Graham-Adams, and Daniels voting yes. 4-0.

9.B. Non-Licensed Personnel Report: The non-licensed personnel report was presented for review:

- Resignation of Ceili Ohnemus, 7.00 Instructional Behavior Assistant at Elmira Elementary School, effective June 16, 2023.
- Resignation of Amber Valenzuela, 3.50 Instructional Assistant at Veneta Elementary, effective June 16, 2023.
- Resignation of Christy Carleton, 5.25 Instructional Assistant at Elmira High School, effective June 16, 2023.
- Resignation of Margaret Smith, 6.50 Title Instructional Assistant at Elmira Elementary School, effective June 16, 2023.
- Retirement of Pam Zellers, 7.00 Title Instructional Assistant at Elmira Elementary School, effective June 16, 2023.
- Retirement of Robert Gordon, 1.0 FTE Custodian, effective August 10, 2023.
- Hiring of Karson Laing, Varsity Boys Soccer Coach at Elmira High School, effective the 2023-2024 season.
- Resignation of Joshua Wolfram, Assistant Football Coach at Elmira High School, effective May 25, 2023.
- Resignation of Paul Witt, Head Softball Coach at Elmira High School, effective June 8, 2023.
- Resignation of Doug Laing, Assistant Coach for Track & Field at Elmira High School, effective June 12, 2023.

LATE ITEMS/CLOSING COMMENTS (Agenda Item 10): None at this time.

UPCOMING EVENTS (Agenda Item 11):

July 10 – August 3: Summer School

July 10 – August 24: KITS

ADJOURNMENT (Agenda Item 12): Chair Boren adjourned the meeting at 7:23 pm.

Attest: _____
School Board Representative

Gary E. Carpenter, Jr., Superintendent



July 17, 2023 – Resolution #23-24/01

FERN RIDGE SCHOOL DISTRICT 28J
88834 Territorial Road
Elmira, OR 97437

RESOLUTION NO. #23-24/01

BE IT RESOLVED, That the Board of Directors, School District No. 28J, make the following annual organizational appointments for the school year 2023-2024:

- Clerk (ORS 332.515) Gary Carpenter
- Business Manager/Deputy Clerk (ORS 332.515) Quanah Bennett
- Budget Officer (ORS 294.331) Gary Carpenter
- Custodian of Funds and authorizes the facsimile signature of the custodians of funds, if one is to be used. No other signatures are authorized for district checks. (ORS 328.441, 328.445) Gary Carpenter, Quanah Bennett
- Authorize Salary Payments according to district policy and state laws Gary Carpenter, Quanah Bennett
- Official Legal Advisors The Hungerford Law Firm, LLP
Oregon School Boards Association
Legal Division
Garrett, Hemann, Robertson, P.C.
Luvaas, Cobb, P.C.
Register Guard
- Official Newspapers for Publication Pauly, Rogers and Co., P.C.
- District Auditors (ORS 328.465, 327.137, 297.405) WHA Insurance
- Insurance Agents of Record Banner Bank, LGIP
- Depository of School Funds (ORS 328.441, 294.805-294.895) Gary Carpenter, Quanah Bennett
- Directs the Superintendent and Business Manager to utilize any other banking facilities which are to the financial advantage of the District. Gary Carpenter
- Authorizes the Superintendent to accept resignations and employ personnel as budgeted for and appropriated for the school year upon approval of the school board.
- Managers of Grant Funds Gary Carpenter, Quanah Bennett
- Local Public Contract Review Board (ORS 279A.060) Board
- Bond Counsel Mersereau, Shannon, LLP

ADOPTED by the Board this 17th day of July 2023, Lane County School District 28J.

Board of Directors, Chair

Superintendent

Date

Fern Ridge School District 28J



Gary E. Carpenter Jr.
Superintendent

88834 Territorial Road, Elmira, OR 97437
Phone: (541) 935-2253
Fax: (541) 935-8222

Classified/Confidential/Manager/Coach Employees Resignations/New Hires/Transfers/Other Report July 17, 2023

Resignations/Retirements

1. Resignation of Jose Gonzales, 8.00 Custodian, effective July 6, 2023.

New Hires/Transfers

1. Hiring of Megan Full, 6.00 Title Instructional Assistant at Veneta Elementary, effective August 28, 2023.
2. Hiring of Marilyn Pengra, 6.50 Special Education Instructional Assistant at Veneta Elementary, effective August 28, 2023.
3. Hiring of Tyler Kohler, 7.00 Instructional Behavior Assistant at Elmira Elementary, effective August 28, 2023.
4. Hiring of Kaishea Kegley, 8.00 Custodian, effective July 24, 2023.
5. Transfer of Cara Foote from 6.50 Instructional Assistant to 7.00 Instructional Assistant

Other

1. None at this time.

Coaches

1. None at this time.