



Oregon

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NOTICE OF ADOPTED CHANGE TO A COMPREHENSIVE PLAN OR LAND USE REGULATION

Date: February 10, 2016

Jurisdiction: City of Medford

Local file no.: CP-15-078

DLCD file no.: 011-15

The Department of Land Conservation and Development (DLCD) received the attached notice of adopted amendment to a comprehensive plan or land use regulation on 02/09/2016. A copy of the adopted amendment is available for review at the DLCD office in Salem and the local government office.

Notice of the proposed amendment was submitted to DLCD 50 days prior to the first evidentiary hearing.

Appeal Procedures

Eligibility to appeal this amendment is governed by ORS 197.612, ORS 197.620, and ORS 197.830. Under ORS 197.830(9), a notice of intent to appeal a land use decision to LUBA must be filed no later than 21 days after the date the decision sought to be reviewed became final. If you have questions about the date the decision became final, please contact the jurisdiction that adopted the amendment.

A notice of intent to appeal must be served upon the local government and others who received written notice of the final decision from the local government. The notice of intent to appeal must be served and filed in the form and manner prescribed by LUBA, (OAR chapter 661, division 10).

If the amendment is not appealed, it will be deemed acknowledged as set forth in ORS 197.625(1)(a). Please call LUBA at 503-373-1265, if you have questions about appeal procedures.

DLCD Contact

If you have questions about this notice, please contact DLCD's Plan Amendment Specialist at 503-934-0017 or plan.amendments@state.or.us



NOTICE OF ADOPTED CHANGE TO A COMPREHENSIVE PLAN OR LAND USE REGULATION

FOR DLCD USE

File No.: 011-15 {23837}

Received: 2/9/2016

Local governments are required to send notice of an adopted change to a comprehensive plan or land use regulation **no more than 20 days after the adoption.** (See [OAR 660-018-0040](#)). The rules require that the notice include a completed copy of this form. **This notice form is not for submittal of a completed periodic review task or a plan amendment reviewed in the manner of periodic review.** Use [Form 4](#) for an adopted urban growth boundary including over 50 acres by a city with a population greater than 2,500 within the UGB or an urban growth boundary amendment over 100 acres adopted by a metropolitan service district. Use [Form 5](#) for an adopted urban reserve designation, or amendment to add over 50 acres, by a city with a population greater than 2,500 within the UGB. Use [Form 6](#) with submittal of an adopted periodic review task.

Jurisdiction: City of Medford

Local file no.: **CP-15-078**

Date of adoption: 2/4/2016

Date sent: 2/9/2016

Was Notice of a Proposed Change (Form 1) submitted to DLCD?

Yes: Date (use the date of last revision if a revised Form 1 was submitted): 6/2015

No

Is the adopted change different from what was described in the Notice of Proposed Change? Yes No

If yes, describe how the adoption differs from the proposal:

Local contact (name and title): Carla Angeli Paladino

Phone: 541-774-2395

E-mail: carla.paladino@cityofmedford.org

Street address: 200 S. Ivy St.

City: Medford

Zip: 97501-

PLEASE COMPLETE ALL OF THE FOLLOWING SECTIONS THAT APPLY

For a change to comprehensive plan text:

Identify the sections of the plan that were added or amended and which statewide planning goals those sections implement, if any:

Revisions to the Public Facilities Element of the Comprehensive Plan to 1) Adopt the Medford School District 549C Long Range Facilities Plan, August 11, 2014 Update; 2) Provide revisions to the goals, policies, and implementation measures of the school section of the element. Goals 1, 2, 6, 7, 11, 14

For a change to a comprehensive plan map:

Identify the former and new map designations and the area affected:

Change from	to	acres.	A goal exception was required for this change.
Change from	to	acres.	A goal exception was required for this change.
Change from	to	acres.	A goal exception was required for this change.
Change from	to	acres.	A goal exception was required for this change.

Location of affected property (T, R, Sec., TL and address):

The subject property is entirely within an urban growth boundary

The subject property is partially within an urban growth boundary

If the comprehensive plan map change is a UGB amendment including less than 50 acres and/or by a city with a population less than 2,500 in the urban area, indicate the number of acres of the former rural plan designation, by type, included in the boundary.

Exclusive Farm Use – Acres:	Non-resource – Acres:
Forest – Acres:	Marginal Lands – Acres:
Rural Residential – Acres:	Natural Resource/Coastal/Open Space – Acres:
Rural Commercial or Industrial – Acres:	Other: – Acres:

If the comprehensive plan map change is an urban reserve amendment including less than 50 acres, or establishment or amendment of an urban reserve by a city with a population less than 2,500 in the urban area, indicate the number of acres, by plan designation, included in the boundary.

Exclusive Farm Use – Acres:	Non-resource – Acres:
Forest – Acres:	Marginal Lands – Acres:
Rural Residential – Acres:	Natural Resource/Coastal/Open Space – Acres:
Rural Commercial or Industrial – Acres:	Other: – Acres:

For a change to the text of an ordinance or code:

Identify the sections of the ordinance or code that were added or amended by title and number:

For a change to a zoning map:

Identify the former and new base zone designations and the area affected:

Change from	to	Acres:
Change from	to	Acres:
Change from	to	Acres:
Change from	to	Acres:

Identify additions to or removal from an overlay zone designation and the area affected:

Overlay zone designation:	Acres added:	Acres removed:
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Location of affected property (T, R, Sec., TL and address):

List affected state or federal agencies, local governments and special districts: School District 549C

Identify supplemental information that is included because it may be useful to inform DLCD or members of the public of the effect of the actual change that has been submitted with this Notice of Adopted Change, if any. If the submittal, including supplementary materials, exceeds 100 pages, include a summary of the amendment briefly describing its purpose and requirements.

ORDINANCE NO. 2016-19

AN ORDINANCE approving an amendment to the *Comprehensive Plan* by adopting by reference and incorporating the Medford School District 549C Long Range Facilities Plan, August 11, 2014 Update.

THE CITY OF MEDFORD ORDAINS AS FOLLOWS:

Section 1. That an amendment to the *Comprehensive Plan* by adopting by reference and incorporating the Medford School District 549C Long Range Facilities Plan, August 11, 2014, is hereby approved.

Section 2. The approval is based upon the Planning Commission Report dated January 28, 2016, attached as Exhibit A and incorporated herein.

PASSED by the Council and signed by me in authentication of its passage this 4 day of February, 2016.

ATTEST: Winnie Shepard
Deputy City Recorder

APPROVED February 4, 2016.

[Signature]
Mayor
[Signature]
Mayor



City of Medford

Planning Department

Working with the community to shape a vibrant and exceptional city

PLANNING COMMISSION REPORT

to City Council for a Class-A legislative decision: **Comprehensive Plan Amendment**

Project Medford School District Long-Range Facilities Plan
File no. CP-15-078
To Mayor and City Council *for 2/4/2016 hearing*
From Planning Commission *via* Carla Angeli Paladino, Planner IV
Reviewer John Adam, AICP, Principal Planner
Date January 28, 2016

BACKGROUND

Proposal

Consideration of a Class-A (major) legislative amendment of the Medford Comprehensive Plan Public Facilities Element to adopt by reference and incorporate the Medford School District 549C Long-Range Facilities Plan, August 11, 2014 Update, into the Comprehensive Plan, Public Facilities Element. Exhibit C

History

In 2007, the State legislature created new provisions and amended ORS 195.110 to establish the required content of a facilities plan for "Large School Districts" (Senate Bill 336). ORS 195.110 directs an affected city or county with a Large School District to include a school facilities plan prepared by the district in consultation with the affected city or county as an element of its comprehensive plan.

The 2012 School Facilities Plan was adopted into the Medford Comprehensive Plan Public Facilities Element by City Council on January 16, 2014.

The school district provided City Council with an updated school facilities plan in January 2015. City Council directed staff to initiate a General Land Use Plan amendment to accommodate the revised school facilities plan on January 15, 2015.

The Planning Commission held a study session on June 22, 2015. The Planning Commission held a hearing on July 23, 2015, and voted 6-1-1 to recommend adoption to the Council. (Exhibits B and C)

EXHIBIT A

The findings in support of this amendment are contained in Exhibit A at the end of this report.

Authority

This proposed plan authorization is a Class-A legislative amendment of the Comprehensive Plan. The City Council is authorized to approve amendments to the Comprehensive Plan under Medford Municipal Code §§10.102–10.111, 10.164, and 10.184.

ANALYSIS

The new plan updates information such as existing school capacities (Tables 3.1 through 3.4), enrollment forecasts (Chapter 5.B), facility needs (Chapter 6), costs (Chapter 7), and recommendations for future facilities (Chapter 8). In particular, Chapter 6.C identifies potential school site options and identifies a property in the MD-2 portion of the urban reserve. Chapter 6.C also discusses a property site on Hull Road that was a concern to the Planning Commission and City Council in the 2012 Plan. While the school district's latest facilities plan retains the Hull Road property as a potential school site, it is identified as a "long-range option" that would need to be brought into the City's UGB before it could be utilized.

RECOMMENDATION

The Planning Commission recommends adopting the proposed amendment based on the analyses, findings, and conclusions in the Commission Report dated January 28, 2016, including Exhibits A through H.

EXHIBITS

- A Findings and Conclusions
- B Proposed Amendment
- C Medford School District 549C Long Range Facilities Plan, August 11, 2014 Update
(Hard Copy available in the Planning Department or electronic version via link)
- D Minutes, Planning Commission
- E DLCD Comments
- F 1000 Friends of Oregon Comments
- G Hillcrest Corporation Comments
- H Amended Hull Road Property Memorandum of Understanding

CITY COUNCIL AGENDA: FEBRUARY 4, 2016

Exhibit A

Findings and Conclusions

Comprehensive Plan, Review and Amendments chapter: Amendments [to Conclusions] shall be based on the following:

- 1. A change or addition to the text, data, inventories, or graphics which substantially affects the nature of one or more conclusions.***

Findings

The Schools Section Conclusions portion of the Public Facilities Element of the Comprehensive Plan contains 13 conclusions. The School District's 2014 plan results in changes to five of these conclusions. (Exhibit B)

Conclusion no. 8 has been revised to recognize that the land donation agreement between Medford School District and property owners at the southeast intersection of Bellinger Avenue and Hull Road has been extended through January 1, 2020. The property is considered only as a potential long-range option for a school site because it is located outside the City's urban growth boundary and urban reserve.

Conclusion no. 9 has been deleted because the 2014 School Facilities Plan does not include the previous analysis of potential suitable school sites. The revised plan includes discussion of a potential suitable school site within the MD-2 urban reserve subarea and a property at the southeast intersection of Bellinger Avenue and Hull Road that is now considered only as a potential long-range option because it is located outside the City's urban growth boundary and urban reserve.

Conclusion no. 10 has been revised to reflect Medford School District's acknowledgment that the potential school site located at the southeast intersection of Bellinger Avenue and Hull Road lies outside of the City's urban reserve and urban growth boundary and is therefore only a long-range option. Use of this site would require a Regional Plan Major Amendment and associated corrective measures to be taken.

Conclusions

Several new Comprehensive Plan Conclusions are prompted by new information contained within the Medford School District Facilities Plan. Statutory requirements (Comprehensive Plan Goals and Policies Criterion no. 5) compel the City to incorporate the School District Plan, which contains a significant amount of new data, text,

and information. The new plan precipitates a need for the City to amend the Conclusions section. Criterion 1 is satisfied.

Comprehensive Plan, Review and Amendments chapter: Amendments [to Goals and Policies] shall be based on the following [criteria 1–6]:

1. A significant change in one or more Conclusion.

Findings

The school district has revised five conclusions.

Conclusions

A significant change in the Conclusions has been demonstrated.

2. Information reflecting new or previously undisclosed public need.

Findings

The updated School Facilities Plan reveals new information regarding student population projections, the ability of existing facilities to accommodate the projected population, and the assessment of potential school sites. Combined, this information identifies a previously unknown public need for additional capacity in Medford School District facilities and new sites to accommodate those facilities.

Conclusions

New public needs have been demonstrated by the Long-Range Facilities Plan. Criterion 2 is satisfied.

3. A significant change in community attitudes or priorities.

Findings

The changes do not result from a change in community attitudes or priorities.

Conclusions

This criterion does not apply.

4. Demonstrable inconsistency with another Plan provision.

Findings

There are no inconsistencies requiring the changes.

Conclusions

This criterion does not apply.

5. *Statutory changes affecting the Plan.*

Findings

There are no statutory changes affecting the Plan.

Conclusions

This criterion does not apply.

6. *All applicable Statewide Planning Goals.*

Goal 1—Citizen Involvement

Findings

The City has an adopted Citizen Involvement Element in compliance with Statewide Planning Goal 1. This City initiated proposal was provided to the State (the Department of Land Conservation and Development) for review and comment. Hearing notices are published in the Mail Tribune and posted on the City's website along with meeting agendas in order to engage citizen participation in the process and provide comments. The review bodies (Planning Commission and City Council) will consider and vote on the proposed amendment during televised public hearings, providing an open forum to discuss the proposal.

Amendments to the Public Facilities Element Schools section were prepared by the City of Medford Planning Department. The School Facilities Plan proposed to be adopted by reference was prepared by the Medford School District in consultation with City Staff. The Planning Commission reviewed the amendment in a study session on June 22, 2015. The Planning Commission held a hearing on July 23, 2015 and voted 6–1–1 to recommend adoption to the Council (Exhibit D). The City Council public hearing is scheduled for February 4, 2016.

Conclusions

Statewide Planning Goal 1 is satisfied.

Goal 2—Land-use Planning

Findings

Goal 2 and its implementing Oregon Administrative Rules and Oregon Revised Statutes require city land use actions to be consistent with the adopted comprehensive plan. Comprehensive plans must demonstrate how the Statewide Planning Goals are to be achieved. The plan must contain specific implementation strategies that are consistent with and adequate to carry out the plan, and which are coordinated with the plans of other affected governmental units.

The proposed amendment affects all areas within the City, UGB, and Urban Reserve that are within the School District's boundaries. The proposal provides revised conclusions and policies in the Comprehensive Plan, which support the Public Facilities Element Schools section Goals.

Conclusions

Statewide Planning Goal 2 is satisfied.

Goal 3—Agricultural Lands does not apply in this case.

Goal 4—Forest Lands does not apply in this case.

Goal 5—Natural Resources, Scenic and Historic Areas, and Open Spaces does not apply in this case.

Goal 6—Air, Water, and Land Resources Quality

Findings

Goal 6 is implicated in that the School District Facilities Plan site selection criteria accounts for environmental factors. Any potential site should be free from air, water, and soil pollution.

Conclusions

Statewide Planning Goal 6 is satisfied.

Goal 7—Areas Subject to Natural Hazards

Findings

Goal 7 is implicated in that the School District Facilities Plan includes site selection criteria for future school facilities. Natural hazards considered in the selection criteria include proximity to earthquake fault zone locations and active faults, dam inundation areas, 100-year floodplains, soil subsurface bearing capacity, landslide and/or liquefaction potential, and drainage flows.

Conclusions

Statewide Planning Goal 7 is satisfied.

Goal 8—Recreational Needs does not apply in this case.

Goal 9—Economic Development does not apply in this case.

Goal 10—Housing does not apply in this case.

Goal 11—Public Facilities and Services

Findings

The fundamental purpose of the amendment is to establish a general but timely view of where, when and how public school services and facilities will be provided to support urban development within the City of Medford and how the City coordinates with the districts. School services and facilities are categorized as Category “B” public facilities. This category of facilities and services enhances and protects development in the City and is provided in response to development that occurs.

Conclusions

Statewide Planning Goal 11 is satisfied.

Goal 12—Transportation does not apply in this case.

Goal 13—Energy Conservation does not apply in this case.

Goal 14—Urbanization

Findings

New conclusions have been prepared for the Public Facilities Element, specifically Conclusions No. 5, No. 6, and No. 8–10, which address urban land needs and location and recognize the adopted corrective measures and plan adjustments established in the Regional Plan Element and Greater Bear Creek Valley Regional Plan. The proposed Conclusions recognize Comprehensive Plan requirements for a Major Regional Plan amendment when a City proposes to include property into the UGB that is not within the established Urban Reserves.

Conclusions

Statewide Planning Goal 14 is satisfied.

Goals 15–19 do not apply to this part of the State.

Exhibit B

Public Facilities Element Schools Section

Deleted text is ~~highlighted and struck through~~; added text is
bold/underlined

SCHOOLS

Revised Schools Section adopted February 4, 2016 by Ordinance 2016-XXX

INTRODUCTION

This Schools section of the Public Facilities Element addresses primary, secondary and higher education facilities located in the Medford Urban Growth Boundary (UGB). The City of Medford is served by a number of educational institutions providing primary, secondary and higher education. The City is served by two public school districts, Medford 549C and Phoenix-Talent, providing for the primary and secondary (K-12) educational needs of the population, as well as two higher education institutions.

Rogue Community College (RCC) offers higher educational opportunities to Medford and the greater Rogue Valley. RCC has facilities at several valley locations, including a downtown Medford campus, facilities located just north of the Medford UGB, and facilities in Grants Pass. Four-year and post-graduate educational opportunities are also provided within a short distance of Medford: Southern Oregon University (SOU), located 15 miles down Interstate 5 in the City of Ashland, offers both baccalaureate and master's programs. SOU and RCC also provide combined facilities in downtown Medford at the Higher Education Center.

This Schools section of the Public Facilities Element also provides specific information about the current enrollment, educational standards, facilities inventories, projected enrollments and needed expansions of the two public school districts from the Long-Range School Facilities plans adopted by the school districts (Medford 549C and the Phoenix-Talent).

EXISTING FACILITIES OVERVIEW

Public Primary and Secondary Education - Medford 549C and Phoenix-Talent School Districts

In 2010, 81% of the population in the Medford 549C School District lived within the Medford City limits and 25% of the Phoenix-Talent School District population lived within the Medford City limits. The Medford 549C School District serves approximately 85% of the Medford UGB, including all of the UGB west of Interstate 5 and all of the UGB east of Interstate 5 north of Barnett Road. The Phoenix-Talent School District serves the southeastern portion of Medford, east of the Interstate and south of Barnett Road, totaling approximately 15% of the UGB.

In November 2006, voters in the Medford 549C School District approved Measure 15-73, which authorized issuance of \$189 million dollars in bonds to renovate, improve and expand district facilities. Improvements included significant renovations to North Med-

ford High School and the construction of a new South Medford High School on a larger site. Elementary school improvements included the reconstruction of the Jackson and Roosevelt facilities. Lone Pine Elementary received significant renovation and new facilities. All other campuses within the District received significant enhancements.

The Phoenix-Talent School District serves the southeastern portion of Medford and currently has one elementary school (Orchard Hill) within the UGB. In 2010, the district acquired an 11.7-acre site at the northeast corner of N. Phoenix Road and Coal Mine Road for the future development of an elementary school when additional population in the Southeast Area precipitates the need for an additional school.

The City of Medford has inter-governmental agreements for the collection of a development excise tax with both the Medford 549C and Phoenix-Talent school districts. In 2007, the Oregon State Legislature passed Senate Bill 1036 (ORS 320.170) to help school districts pay for new and expanded school facilities. ORS 320.170 authorizes school boards, in cooperation with cities and counties, to tax new residential and non-residential development. In January 2012, the City Council approved Ordinance 2012-11 authorizing the collection of an excise tax for the continuing development of Medford 549C School District facilities. In September 2012, the City Council approved Ordinance 2012-139, authorizing the collection of an excise tax for the continuing development of Phoenix-Talent School District facilities.

Primary and Secondary Education - Existing Facilities

Within the Medford UGB, there are currently (2013) 17 public schools (not including charter schools). In addition to public schools, there are several private schools serving the kindergarten through 12th grade student population. Public schools located outside Medford's UGB also serve areas within the UGB. There are two elementary schools within the Phoenix-Talent School District that serve a portion of the UGB. One of these schools (Orchard Hill) is within Medford's UGB and serves the southeastern portion of the UGB.

Figure 51 shows the location and type of public schools within Medford's UGB.

Medford 549C School District Facilities

- 11 elementary schools within the UGB
- 3 elementary schools outside the UGB (Griffin Creek, Ruch, and Jacksonville)
- 2 middle schools within the UGB
- 3 high schools within the UGB
- ~~13~~ public charter schools

Phoenix-Talent School District Facilities

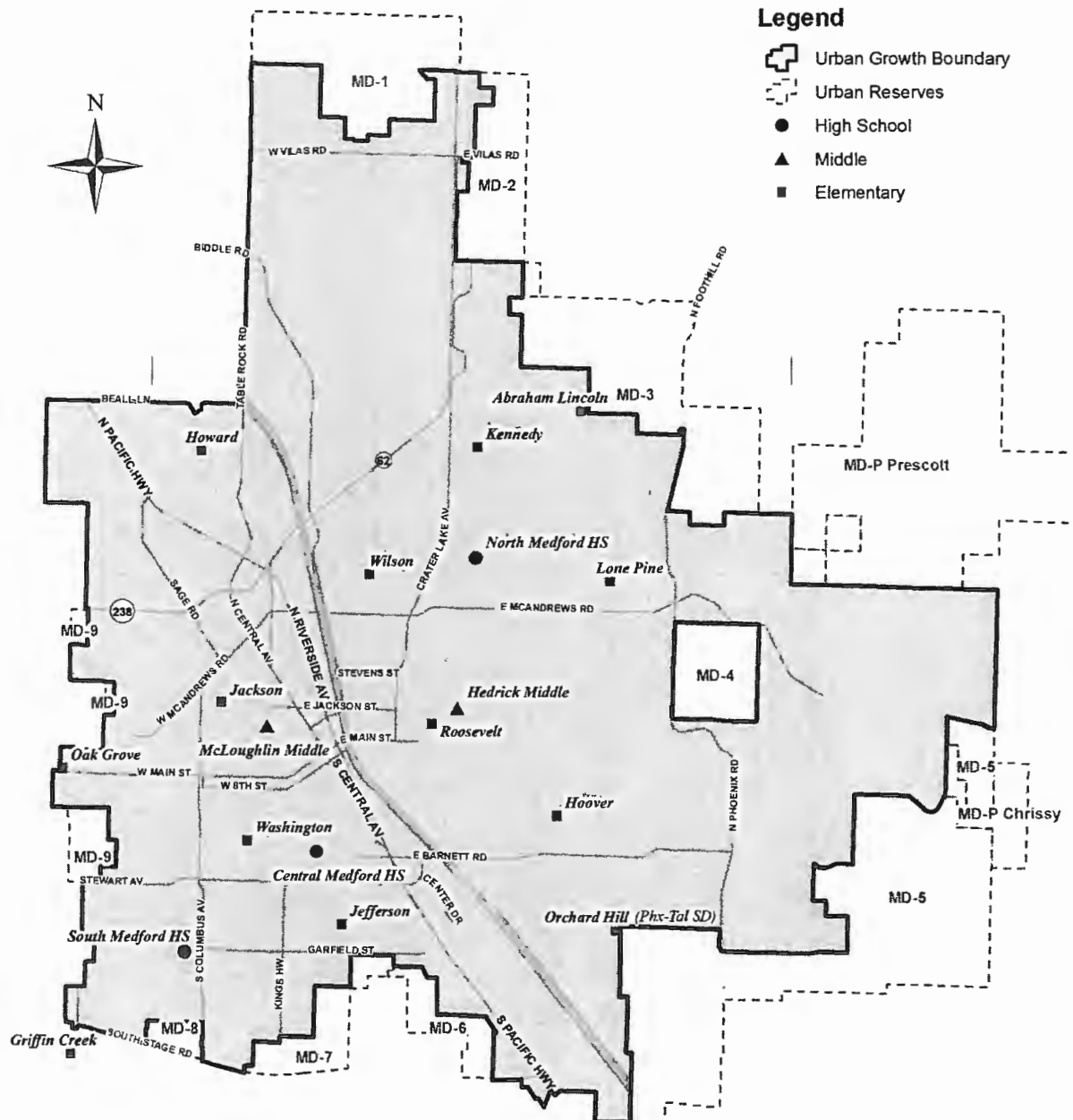
- 1 elementary schools within the UGB

- 2 elementary schools outside the UGB (Phoenix Elementary, Talent Elementary)
- 1 middle school outside the UGB (Talent Middle School)
- 1 high school outside the UGB (Phoenix High School)

Private Schools

- New Dimensions Elementary
- Sacred Heart Elementary
- Grace Christian Elementary
- St. Mary's High School
- Rogue Valley Adventist School
- Medford Montessori School
- Crossroads School
- Cascade Christian High School

SCHOOLS FIGURE 1: Public School Facilities, Medford Urban Growth Boundary



Higher Education Facilities

Rogue Community College

Rogue Community College (RCC) was established in November 1970 by vote of the Josephine County electorate. On May 21, 1996, voters in Jackson and Josephine counties approved expansion of RCC's district boundaries to include all of Jackson County, allowing a wider range of educational programs, more job-training opportunities, and greater access for students throughout the Rogue Valley.

Each year, the college provides educational experiences to more than 17,000 students (5,700 full-time equivalent) (2012) in lower-division transfer, job training, and development studies programs. RCC has the Riverside Campus in downtown Medford, located along Ninth Street, Bartlett Street, and Riverside Avenue. Responding to increasing enrollment, the college developed programs in a number of nearby facilities in Medford's downtown area. Enrollment at the RCC downtown campus has grown by over 600 students in recent years (2005/06 – 2009/10), an increase of 42.3%.

In 2008, RCC and Southern Oregon University (SOU) collaborated in the development of a 68,700-square foot building located near the Riverside Campus in downtown Medford, known as the Higher Education Center (HEC). Both SOU and RCC needed additional classroom space in downtown to adequately meet the needs of the population. The sharing of a single facility saves the two institutions in operating costs and avoids duplication of resources. Total facility cost was \$22.2 million dollars, with each school contributing half of the construction cost. Funding for the facility received support from many sectors of the community, including state bonding, bonds approved by Jackson County voters, and \$2.6 million dollars raised locally in matching funds. Prior to the construction of the HEC, many RCC and SOU classrooms were located in several older remodeled commercial buildings. This facility provides state-of-the-art labs and classrooms in a building designed for academic purposes.

The Table Rock Campus is the newest of the RCC locations. The campus opened in 2005 on the site of a former electronics manufacturing facility located just north of the Medford UGB in White City. The facility offers a wide range of programs such as Diesel Technology, Manufacturing, Electronics Technology, Fire Science, Emergency Medical Technology and Public Safety. The vision for this campus is to maintain and expand its focus on career and technical training, while adding academic skills, continuing education classes and support services to create a more comprehensive campus.

RCC offers Associate Degrees with specific articulation agreements established with SOU, for the completion of four-year degrees in the areas of Business, Criminology, Computer Science, Early Childhood Education and Human Services. RCC also offers Associate Degrees with articulation agreements with the Oregon Institute of Technology (OIT) in the areas of Manufacturing, Engineering and Informatics Technology. OIT and RCC are planning to include articulation agreements for several health education programs, such as Medical Imaging, Dental Hygiene and Medical Laboratory Science.

In September 2009, the RCC Board of Education contracted with local design firms for a master facilities plan. The process included college beneficiaries and constituents in a collaborative planning process. Significant background information was documented regarding the college facilities, including the creation of a digital database of all buildings and program areas, allowing a better understanding of facility capacities. The *RCC College Master Plan* was completed and accepted by the RCC Board of Education in April 2011.

Southern Oregon University

Southern Oregon University (SOU) is an accredited four-year public university offering Baccalaureate and Master's Degree programs. Although the main campus is in Ashland, as noted, the university maintains a satellite campus in Medford located in the Higher Education Center. In a cooperative arrangement with Rogue Community College (RCC), SOU also offers college courses to RCC students. These courses are designed to provide supplemental coursework for students interested in transferring to the university.

PUBLIC SCHOOL DISTRICT FACILITIES PLANNING

Long-Range Planning for Public School Facilities

Long-range school facilities planning is an important and somewhat complex process requiring the cooperation and coordination of school districts, local governments and citizens. Long-range planning by the Medford and Phoenix-Talent School Districts is continuous. It is a different type of planning, however, from the long-range planning activities of local "general-purpose" governments, whose responsibility is to direct the location and intensity of community growth and development, and to perform functions of community and regional planning that fall within their jurisdictional and statutory authority. Conversely, school districts are "special-purpose" government entities, whose role is to coordinate with city and county agencies, and react appropriately to the service demands generated by the growth and development policy decisions of general-purpose governments. State statutes, particularly ORS 195.110, define the City's role and responsibilities in the required facilities planning of large (defined by ORS 195.110 as having more than 2,500 students) school districts.

A school district's estimates of future enrollment and school needs are based on the district's forecasted student population, including in its urban and rural areas. Both Medford 549C and Phoenix-Talent school districts have developed enrollment projections utilizing a variety of information, including population and residential development forecasts. These school districts also coordinate with the City of Medford and Jackson County, utilizing land use studies and adopted plans to better evaluate ways to ensure the timely development of new schools.

The identification of locations for new public schools is an important function of any facilities plan adopted by a school district. The need for new schools is closely related to residential development and the various housing densities within the community. It is important that new schools be located with reference to development patterns planned in the local jurisdictions' (cities and counties) adopted comprehensive plans.

ORS 195.110 Facilities Plan, Summary

ORS 195.110 requires a city and/or county containing large school districts to include, as an element of its comprehensive plan, school facilities plans prepared by the districts in consultation with the affected city and county. (Both the Medford 549C and Phoenix-Talent school districts are considered "large school districts".)

Facilities plans submitted by a district must cover a period of at least 10 years and must include the following elements:

- Population projections by school age group.
- Identification by the city or county and the large school district of desirable school sites.
- Descriptions of physical improvements needed in existing schools to meet the minimum standards of the large school district.
- Financial plans to meet school facilities needs, including an analysis of available tools to ensure facilities needs are met.
- Analysis of:
 - The alternatives to new school construction and major renovation; and
 - Measures to increase the efficient use of school sites, including multiple-story buildings and multipurpose use of sites.
- Ten-year capital improvement plans.
- Site acquisition schedules and programs.

Large school districts must identify in their school facilities plans, school facilities needs based on population growth projections and land use designations contained in the city's and/or county's comprehensive plan. Facilities plans must provide an analysis of the land inside the UGB that is suitable, as a permitted or conditional use, for school facilities required for the 10-year period covered by the plan. If a large school district finds that there is an inadequate supply of suitable land for facilities for the 10-year period,

the city or county, or both, and the district must cooperate in identifying land for school facilities and take necessary actions, such as adopting appropriate zoning, aggregating existing parcels in separate ownership, or adding one or more sites designated for school facilities to a UGB pursuant to applicable law.

Educational Service Standard

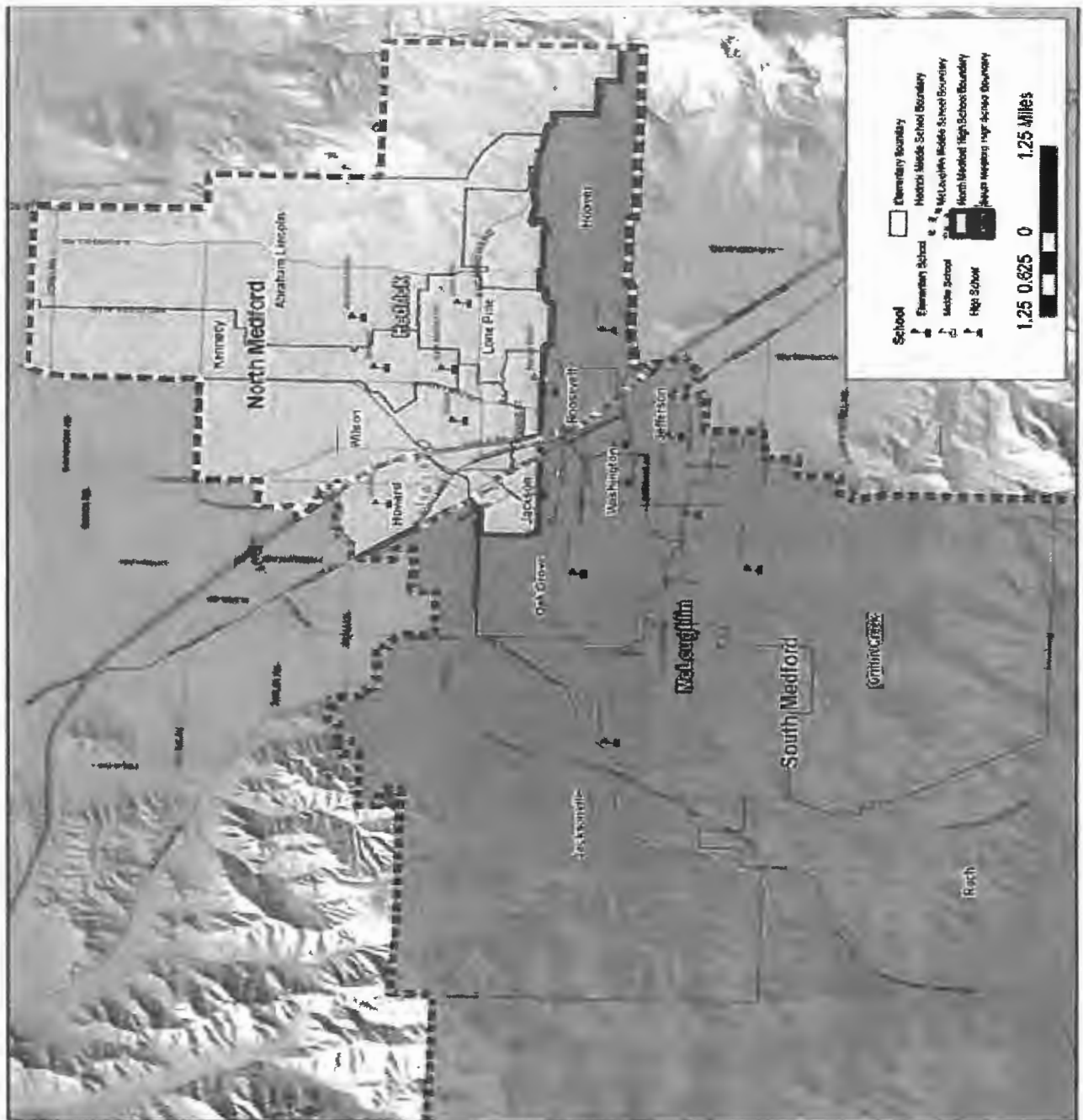
Overcrowding of classrooms is an important factor affecting a school's ability to provide quality educational services. The measurement most often used as a level of service standard is the ratio of students per classroom. Students per classroom is suggested as the level of service measurement for schools because (1) it is easily understood as a measure of facilities capacity, (2) it is frequently used as a workload barometer in teacher contracts, and (3) analyses of schools often use class size as an indicator of educational quality and facilities adequacy. Both Medford 549C and Phoenix-Talent School Districts have adopted similar level of service educational standards:

SCHOOLS TABLE 1: Educational Level of Service Standard

Grade Level	Average Students per Classroom
K-3	<u>2225</u>
<u>34-6</u>	<u>2830</u>
7-8	<u>2932</u>
9-12	<u>2932</u>

Source: *Medford 549C School District Long Range Facilities Plan Update – ~~May 15, 2012~~*
August 11, 2014

SCHOOLS FIGURE 2: Medford School District 549C Boundaries



Source: Medford 549C Long Range Facilities Plan Update – May 15, 2012 August 11, 2014

Medford 549C School District

The Medford 549C School District is the largest school district in Jackson County. The District enrollment for the 2011-2013-1214 school year is 13,547 students. ~~the district included 41% of Jackson County's overall population and enrolled 11,779 students.~~ The district's geographic area includes approximately 370 square miles, extending from the southwest corner of the County to approximately three miles northeast of the City of Medford. Communities within the district include unincorporated Ruch, all of the City of Jacksonville, most of the City of Medford, a portion of the City of Central Point, and the rural areas in between.

The Medford 549C School District adopted its current Long Range Facilities Plan in ~~May August 2012~~ **2014**. The plan is divided into ~~seven~~ **eight** chapters that serve to meet the specified components required by ORS Section 195.110, and which include the following:

- District Planning
- District Educational Program Standards
- Facilities Inventory
- ~~Education Program Standards~~
- School Capacity
- Enrollment Projections
- Facilities Planning Needs
- Capital Facilities Financing
- Conclusions and Recommendations

District-Wide Enrollment Forecast

The Medford 549C School District Facilities Plan projects an average of 2.3% district-wide annual student enrollment growth over its first 10 years (2011–2020), and a growth in student enrollment of 1.4% over the following 10 years, through the end of the planning horizon (2021–2030). This is an average of 1.8% over the entire forecast period, adding approximately ~~4,800~~ **4,500** students ~~to~~ through the year ~~2030~~ **2035**. This translates into ~~2,670~~ **2,470** more elementary school students, ~~802~~ **655** more middle school students, and ~~1,323~~ **1,360** more high school students under the current grade distribution. However, these increases are not forecasted to distribute evenly across the district. Schools near vacant residentially-zoned land are forecasted to have the largest marginal increases in population and will exceed the existing capacity soonest.

Enrollment Forecast by School

The following table details the forecasted growth of each school, except the enrollment for Central High School. ~~The study data for the forecast are also depicted geo-spatially for elementary, middle and high schools on maps contained in the Medford 549C Long Range Facilities Plan, May 15, 2012 Update.~~

SCHOOLS TABLE 2: Enrollment Forecast by School, Medford School District

Enrollment Forecast by School, Medford School District																		
From Demographic and Enrollment Forecasts Johnson Reid, December 2011																		
School	ACTUAL ENROLLMENT							FORECAST ENROLLMENT				2011-2020		2020-2030		2011-2030		
	2005	2006	2007	2008	2009	2010	2011	2015	2020	2025	2030	Δ	AARG	Δ	AARG	Δ	AARG	
North Schools																		
Wilson	572	540	547	559	565	485	485	447	417	433	442	-68	-1.7 %	25	0.6 %	-43	-0.5 %	
Hoover	484	487	468	521	560	638	603	782	935	1,056	1,115	322	4.3 %	179	1.8 %	512	3.0 %	
Lone Pine	558	547	569	547	532	537	564	650	706	743	759	142	3.1 %	52	0.7 %	195	1.8 %	
Kennedy	547	547	587	561	555	515	519	566	624	658	673	105	2.2 %	49	0.8 %	154	1.4 %	
Roosevelt	385	404	354	372	368	407	406	416	435	458	469	29	0.7 %	34	0.8 %	63	0.7 %	
Lincoln	525	543	524	510	475	466	449	510	581	652	689	132	2.5 %	107	1.7 %	240	2.1 %	
Hedrick	956	930	922	935	894	908	894	917	1,109	1,153	1,249	215	2.2 %	139	1.2 %	355	1.7 %	
North Medford	1,941	1,877	1,890	1,759	1,757	1,775	1,734	1,884	2,039	2,224	2,431	305	1.6 %	392	1.8 %	697	1.7 %	
South Schools																		
Guthrie Creek	560	550	538	599	562	593	580	704	835	951	1,008	255	3.9 %	174	1.9 %	428	2.8 %	
Oak Grove	455	538	514	500	474	471	492	571	693	820	877	201	4.4 %	185	2.4 %	385	3.3 %	
Jacksonville	401	366	361	361	325	391	400	459	528	597	630	128	3.4 %	103	1.8 %	250	2.5 %	
Jefferson	543	526	549	542	542	495	505	580	617	681	687	112	2.3 %	90	0.3 %	137	1.3 %	
Jackson	380	373	320	309	317	388	394	445	489	519	532	95	2.6 %	43	0.9 %	138	1.7 %	
Washington	443	421	439	413	405	430	443	484	515	527	534	72	2.3 %	19	0.4 %	91	1.3 %	
Howard	549	544	531	535	501	547	501	563	637	682	701	136	1.7 %	64	1.0 %	200	1.3 %	
Rose	191	199	214	174	197	171	176	147	120	132	139	-56	-3.9 %	19	1.5 %	-37	-1.1 %	
McLoughlin	882	837	866	919	895	837	789	864	1,071	1,123	1,196	282	2.8 %	155	1.4 %	447	2.1 %	
South Medford	1,887	1,920	1,900	1,837	1,777	1,806	1,821	1,838	2,019	2,221	2,447	196	1.3 %	428	1.9 %	676	1.6 %	
K-6	6,593	6,585	6,515	6,503	6,378	6,524	6,517	7,329	8,131	8,859	9,206	1,614	2.5 %	1,075	1.2 %	2,689	1.8 %	
7-8	1,838	1,767	1,788	1,854	1,789	1,745	1,683	1,782	2,180	2,277	2,485	497	2.9 %	305	1.3 %	802	1.9 %	
9-12	3,828	3,797	3,810	3,592	3,534	3,579	3,555	3,722	4,058	4,445	4,878	503	1.5 %	820	1.9 %	1,323	1.6 %	
Total	12,259	12,149	12,113	11,949	11,701	11,848	11,755	12,833	14,369	15,581	16,569	2,614	2.3 %	2,200	1.4 %	4,814	1.8 %	

School Capacity

School conditions and capacity in ~~2011~~ **2013** were inventoried as part of school district facilities planning. Then, combined with the population forecasts, a forecast was developed projecting what year school population might exceed the capacity of each school. The following tables provide the ~~2011~~ **2013** school facilities capacity and the projected 2020 school facilities capacity. **The Table 4 figures are adjusted to allocate for space requirements for partnerships and district programs.**

SCHOOLS TABLE 3: Overall School Facility Capacity, Medford 549C District

Schools	Teaching Stations	Permanent Capacity	Oct 2013 Enrollment	Available Capacity
Elementary Schools	334 330	7,240 7,714	6,517 6,746	723 968
Middle Schools	86	2,120 2,339	1,683 1,789	437 550
High Schools	187 176	4,573 4,787	3,779 **3,714	794 1,073
Total Available Capacity	607 592	13,993 14,840	11,979 12,249	1,954 2,591
Total enrollment does not include chartered schools because Medford School District does not provide or manage the facilities for these schools.				
** Includes Central High School enrollment				

**SCHOOLS TABLE 4: Projected School Facility Capacity 2020 – Medford 549C District
K–6, 7–8, 9–12 Configuration**

Schools	Adjusted Teaching Stations	Adjusted Permanent Capacity	Projected 19/20 Enrollment	Change in Capacity
Elementary Schools	334 <u>309</u>	7,240- <u>7,224</u>	8,131- <u>7,450</u>	-891 - <u>226</u>
Middle Schools	86 <u>85</u>	2,120- <u>2,312</u>	2,180- <u>2,105</u>	-60 <u>+207</u>
High Schools	187 <u>176</u>	4,573- <u>4,787</u>	4,058- <u>4,227</u>	+515 <u>+560</u>
Total Available Capacity 2020	607 <u>576</u>	13,993- <u>14,323</u>	13,958- <u>13,782</u>	-436 <u>541</u>
From Demographic and Enrollment Forecasts, Table 23. Johnson Reid, December 2011				

Facilities Needs

As of ~~2013~~ 2014, public school facilities within the Medford 549C School District were adequate to meet the needs of the community. However, the adopted Medford 549C School District Facilities Plan indicates a need for at least one additional elementary school facilities ~~on both the east and west sides of Medford by 2020~~ 2024. The enrollment forecast, using the year 2011 grade configuration, results in the need for at least one elementary school, with a likelihood of needing two by 2020. ~~One will be needed on the west side of Medford to prevent overcrowding at Oak Grove and Griffin Creek elementary schools, and another on the east side of Medford to relieve overcrowding at Hoover and Lone Pine elementary schools. The reasons for these forecasted enrollment increases are slightly different. On the west side of Medford, existing schools are already near their maximum capacity, and this area is anticipated to have a high student population increase due to potential increases in both housing inventories and household size. On the east side of Medford there is a large supply of un-built residential land, which, when built-out and occupied, will increase the number of students in the area.~~

~~New Sites – Long-Term~~ Future School Site Options

The Medford 549C School District Facilities Plan determined that there is an inadequate supply of land under their ownership to meet the identified long-term needs of the student population. As noted, there is a projected need for two additional elementary schools ~~school within the next 10 years (one to relieve Hoover/Lone Pine elementary schools and one to relieve Griffin Creek/Oak Grove elementary schools). An east side site is identified on the Southeast Plan Map, a refinement plan to the General Land Use~~

~~Plan Map in the Medford Comprehensive Plan. The Plans indicates that a west side site will need to be located in the vicinity between Griffin Creek and Oak Grove elementary schools to accommodate projected enrollment growth in that area.~~

MD-2 Property: The District has a Letter of Intent for a land donation of 20 acres located within an adopted Urban Reserve Area near Coker Butte Road and Springbrook Road. The property is located in the city's urban reserve and might be adopted into the Urban Growth Boundary in the near future. The location of this property meets the District's requirements for future school sites as established in the School Facilities Plan's site selection criteria. This property is large enough to fit either a future elementary or middle school.

The District desires to cooperate with the City and landowners to bring the property into the urban growth boundary to provide additional capacity to meet further growth needs. An amendment to the existing urban growth boundary must be mutually reviewed and approved by the City and County and acknowledged by the State. The procedure would include a comprehensive plan amendment and zone change so that the site will be appropriately zoned.

Property Purchase: The District should also consider purchasing land to meet the need for future school sites. The cost for a 10-acre plot to meet the standard for an elementary school within the existing Urban Growth Boundary would range between \$500,000 and \$1,000,000. The cost for a 20-acre lot to meet the recommended middle school standard within the Urban Growth Boundary would range between \$1,000,000 and \$2,000,000. Property located in the Urban Growth Boundary to meet future land needs is becoming more difficult to locate. Property located in the Urban Reserve to meet future land needs could be purchased at a lower cost but will still need to be incorporated into the Urban Growth Boundary.

This City has designated a future elementary school site on the Southeast Area Plan Map in a planned residential area to the east of North Phoenix Road and north of East Barnett Road. Although the site has not been acquired by the District, the Southeast Plan provides for notification to and coordination with the District through a required Planned Unit Development review process as the area is built out.

Hull Road Property: The owners of property on Hull Road had pledged to gift to the District a 20-acre school site on the southwest quarter of their property. The initial agreement to work through a process to potentially accept the gift expired in 2012. The District and the Hull Road property owners have since amended the initial agreement to extend through January 1, 2020. The Hull Road property is located outside of the Urban Growth Boundary and Urban Reserve and, as such, is currently viewed by the District as a potential long-range option for a school site. The property would need

to be included within the City of Medford's Urban Growth Boundary before the property could be utilized as a school site.

Evaluating Potential School Sites

In evaluating potential sites, many factors must be considered, including health and safety, location, accessibility, environment, physical characteristics (soil and topography), acquisition and development costs (including utilities), and coordination with local comprehensive plans. The criteria adopted by the Medford 549C School District outlined in the following table from the Facilities Plan are intended to select sites that provide for both a safe and supportive environment for students.

Medford School District School Site Selection Criteria

Location

- Allows for efficient and logical school area boundaries (students within the enrollment area live within one-half mile of an elementary school, one mile of a middle schools, or 1.5 miles of a high school)
- Proximate to residential neighborhoods
- Safe walking areas can be provided
- Multiple street approaches available (three frontages ideal)
- Ability to maintain at least a 200-foot setback from nearby farm and forest practices
- Favorable orientation

Safety

- If near arterial roadways, elementary school sites must maintain sufficient setbacks to be conducive to a good learning environment
- These factors must be avoided:
 - Within 1,500 feet of railroad tracks
 - Within Airport Approach overlay zone
 - Crossed by high-voltage (500 KV) power lines
 - Close to high-pressure lines, such as natural gas, gasoline, sewer, or water
 - Contaminants/toxics in the soil or groundwater, such as from landfills, chemical plants, refineries, fuel tanks, nuclear plants, or agricultural use of pesticides or fertilizer
 - Close to high decibel noise sources
 - Close to open-pit mining
 - On or near a fault zone or active fault
 - In a dam inundation area or 100-year floodplain
 - Social hazards in the neighborhood, such as high incidence of crime or drug or alcohol abuse

Environment

- Has a variety of trees and plants or a wooded area for use in education programs such as biology or outdoor learning
- Free from sources of noise that may impede the instructional process
- Free from air, water and soil pollution
- Provides aesthetic view from and of the site
- Environment compatible with the educational program

Soils

- Proximate to faults or fault traces
- Unstable subsurface and bearing capacity
- Danger of slides or liquefaction
- Positive drainage

Topography

- Generally level
- If flat site unavailable, choose site with minimum need for major excavation
- Rock ledges or outcroppings
- Surface and subsurface drainage
- Level area for playfields

Size and Shape

- Length-to-width ratio does not exceed 2:1
- Sufficient open play area and open space
- Potential for expansion for future needs
- Area for adequate and separate bus loading and parking

Accessibility

- Obstacles such as crossings on major streets and intersections, narrow or winding streets, heavy traffic patterns
- Access and dispersal roads
- Natural obstacles, such as grades or gullies
- Access for bus transportation
- Routing patterns for foot traffic
- Remote areas (with no sidewalks) where students walk to and from school
- Easily reachable by emergency response vehicles

Public Services

- Available and feasible at time of construction
- Fire and police protection, including fire water lines

Cost

- Reasonable costs for purchase of property, severance damages, relocation of residents and businesses, and legal fees
- Reasonable costs for site preparation, including, but not limited to, drainage, parking, driveways, removal of existing buildings, and grading
- Reasonable costs for environmental mitigation
- Reasonable maintenance costs

Availability

- On the market for sale or likely to be available
- Title clearance – unencumbered
- Condemnation of buildings and relocation of residents to be avoided

School Sites Analysis – West Side

In assessing potential sites, the Facilities Plan combines the adopted site criteria with half-mile radii walk-able school service area boundaries around the existing elementary schools (Figure 12 – District Plan). The Plan finds that a new west side school site should be located close to the axis between the half-mile boundaries around the existing schools. A site so located would service the centroid of the projected enrollment growth in west Medford with a half-mile walk-able area that would not encroach within a half-mile of any existing school. A school site within this target area would also be well-placed for adaption to (or co-location of) a middle school with a one-mile service boundary that would be adjacent to and west of the one-mile area around McLoughlin Middle School.

The Medford 549C School District evaluated five potential sites within the adopted Facilities Plan. The City of Medford, in working with the District, requested that a sixth site, located at the southwest corner of Cunningham Road and Orchard Home Drive also be analyzed as a potential site for school location. Sites 1-4 and Site 6 analyzed by the District are located within the City's current (2013) UGB. Based on an examination of vacant, re-developable and partially developed tracts within the UGB of at least eight acres, and sited in the area that could provide for a reasonable redistribution of forecasted student population for projected over-capacity schools on the west side of Medford, the District determined that there is no suitable site within the current UGB that can meet District needs, and, therefore, a site outside of the current UGB for future west side facilities must be considered.

Site Acquisitions

By 2020, the Medford 549C School District will need to acquire sites for additional elementary schools on both the east and west sides of Medford. A potential site on the east side of Medford has been designated on the adopted Southeast Plan but not yet acquired. The District has also secured the rights to acquire property located southeast

~~of the intersection of Hull Road and Bellinger Lane (the "Hull Road Property"). The District acquired the rights to Site 5 as a donation to accommodate projected enrollment increases, and potentially to prevent overcrowding at Oak Grove and Griffin Creek elementary schools. An option to acquire additional land adjacent to the donation site to provide for a middle school and other future west side facility needs has also been secured.~~

~~In accordance with ORS 195.110(5)(a)(B), the Hull Road Property (Site 5) is identified as a desirable school site for the west side. Per the Facilities Plan, the site meets the Medford 549C School District Site Selection Criteria (Table 16 of the Medford 549C School District Facilities Plan). Site 5 is located outside the City's UGB and Urban Reserves. To include this site within the UGB, the District's Facilities Plan acknowledges that amendments to the City's Comprehensive Plan and the Bear Creek Valley Regional Plan would need to be mutually reviewed and approved by the City and County and acknowledged by the State.~~

SCHOOLS SECTION CONCLUSIONS

1. For public primary and secondary education, the Medford 549C and Phoenix-Talent school districts serve the City of Medford, its Urban Growth Boundary, and its Urban Reserves.
2. Funding for public primary and secondary schools comes primarily from state income taxes and state lottery proceeds (50%), local property taxes (35%), and the federal government (15%). In addition, both the Medford 549C and Phoenix-Talent school districts now collect a construction excise tax via the City of Medford in accordance with Oregon Statutes to help pay for school facilities. (ORS 320.170 authorizes school boards, in cooperation with cities and counties, to tax new residential and non-residential development.)
3. Through continuing analyses of changes in demographic trends and in geographic demands for various types of school facilities, and through coordination with local governments such as the City of Medford, school districts can keep pace with the changing demand for the facilities and services they provide.
4. The location and design of school facilities can affect neighborhood formation and traffic patterns.
5. Upon review of the enrollment forecasts (which uses the current (2013) grade configuration) and the analysis from the Medford School District 549C Long-Range Facilities Plan, ~~May 15, 2012~~ **August 11, 2014** Update, the City of Medford concurs with District findings that Medford 549C School District school facilities are adequate to meet District short-term needs, but acknowledges the need for

~~an additional elementary school on both the east and west sides of Medford by 2020~~ **at least one additional elementary school by 2024.**

6. Upon review of the facility inventory and analysis in the Medford School District 549C Long-Range Facilities Plan, ~~May 15, 2012~~ **August 11, 2014** Update, the City of Medford concurs with District findings that there is an inadequate supply of suitable land under Medford School District 549C ownership to meet the identified long-term needs of the student population.
7. Medford's adopted Southeast Plan identifies a general location for a future Medford 549C School District school on the east side within the Medford City limits.
8. Medford School District 549C has, through a donation, obtained rights to property (~~"Site 5" in the Medford School District 549C Long-Range Facilities Plan, May 15, 2012 Update~~) located southeast of the intersection of Bellinger Avenue and Hull Road, which is outside of Medford's Urban Growth Boundary and Urban Reserves. **The initial agreement to work through a process to potentially accept the land donation expired in 2012. The District and the Hull Road property owners have since amended the initial agreement to extend through January 1, 2020. The Hull Road is currently viewed by the District as a potential long-range option for a school site because the property is located outside of the Urban Growth Boundary and Urban Reserve. The property would need to be included within the City of Medford's Urban Growth Boundary before the property could be utilized as a school site.**
- ~~9. Upon review of the Medford 549C School District's site selection criteria and the characteristics of each of the five potentially suitable school sites in the Urban Growth Boundary (UGB) from the Medford School District 549C Long-Range Facilities Plan, May 15, 2012 Update, the City understands but does not concur with District findings that none of the potential sites inside the UGB are suitable to meet District needs for future west side schools.~~
9. ~~10.~~ The City of Medford does not concur with the Medford 549C School District's finding that Site 5 **the Hull Road property** from the *Medford School District 549C Long-Range Facilities Plan, May 15, 2012 Update* is a desirable west side school location. A determination that Site 5 **the Hull Road property** is a desirable location for a west side school(s) cannot be rendered by the City of Medford at the present time. Such a determination can be made by the City only after an "alternatives analysis" of land within and outside the Urban Reserves based on the "priority of land scheme" and the land use decision process in Oregon Urban Growth Boundary (UGB) expansion laws and rules are conducted.

~~Additionally, The Greater Bear Creek Valley Regional Plan, Chapter 5, Monitoring and Implementation (Section 5.1.2), provides that UGB expansion into land not designated as an Urban Reserve will require a Regional Plan Minor or Major Amendment prior to or concurrent with any other process. Section 5.2.4 of the Regional Plan identifies that a "Major Amendment" is any amendment that does not meet the definition of a "Minor Amendment". Since By Section 5.2.4, the 80-acre Hull Road property size of Site 5 exceeds the 50-acre maximum for a Minor Amendment, such a proposal would be deemed a Major Amendment. Processing amendments to the adopted Regional Plan are the responsibility of Jackson County and can only be proposed by the governing authority of a participating RPS Regional Plan jurisdiction. Approval of a Major Amendment to the Greater Bear Creek Valley Regional Plan is also subject to providing corrective measures and plan adjustments per Section 4.4 of the Regional Plan. The City could might concur with the suitability of Site 5 the Hull Road property only after a 'Major' Amendment to the Regional Plan was adopted and associated corrective measures were approved by the appropriate approving authorities."~~

In addition, any consideration ~~by of~~ the Medford 549C School District's ~~proposal~~ to bring the Hull Road property ~~its desirable site~~ into the City's UGB runs directly counter to the City's long-established plan for its growth. After lengthy deliberations and public hearings by both the Planning Commission and the City Council, the City decided that it would not plan to expand into the Exclusive Farm Use (EFU)-zoned land to the west of its current UGB. For the City, this decision is fundamental to its compliance with the Statewide Planning Goals that seek to deter the expansion of urban development into immediately-adjacent agricultural land.

10. Future inclusion of a school district's desirable school site(s) within the City's growth boundaries will require that all applicable state, regional, county, and city land use regulations, as may be in effect at the time, are fully met.
11. Additional work with the Phoenix-Talent School District is needed towards the development and adoption of a long-range facilities plan into the City of Medford Comprehensive Plan Public Facilities Element.

The following Phoenix-Talent School District-adopted documents were previously provided by the District.

- a) Phoenix-Talent School District Daily Class Load Policy, 2/3/83 (adopted).
- b) Phoenix-Talent School District Class Size Policy, 2/3/83 (adopted).
- c) Phoenix-Talent School District enrollment summaries, 10/1/98.
- d) Phoenix-Talent School District Map, Jackson County GIS Files, 1/1/99.

12. The Phoenix-Talent School District has acquired an 11.7-acre site at the north-east corner of North Phoenix Road and Coal Mine Road for the future construction of elementary school facilities, which will accommodate district students residing in the Southeast Area, south of Barnett Road.

SCHOOLS SECTION

GOALS, POLICIES, AND IMPLEMENTATION MEASURES

Goal 1: To support excellent public education for Medford's citizens.

Policy 1-A: The City of Medford hereby adopts by reference the District-adopted *Medford School District Long-Range Facilities Plan, ~~May 12, 2012~~ August 11, 2014 Update*, along with Appendices. [A complete copy of the referenced document, along with appendixes and supplemental appendix, is on file in the Medford Planning Department.]

Policy 1-B: The City of Medford will cooperate with Medford 549C School District and Phoenix-Talent School District in providing public improvements and services needed to support adopted educational programs.

Implementation 1-B(1): Provide a section of the Comprehensive Plan which:

- (a) Describes how the City will involve the school districts in comprehensive planning, including plan amendments and amendments to land use regulations; and,
- (b) Describes the responsibilities of the school districts in comprehensive planning, including plan amendments and amendments to land use regulations affecting provision of education services; and,
- (c) Establishes the role and responsibilities of the City and the school districts with respect to approval of new development; and,
- (d) Establishes the role and responsibilities of the City with respect to school district interests regarding matters such as public facilities, capital facilities and real property, and rights-of-way and easements.

Implementation 1-B(2): Continue meeting and conferring with the Medford 549C and Phoenix-Talent school districts to accomplish the planning required by Oregon Revised Statutes for local government planning coordination, and, in particular, with the Phoenix-Talent School District towards the development and adoption of a long-range facilities plan into the City of Medford Comprehensive Plan Public Facilities Element.

Implementation 1-B(3): Cooperate in identifying land suitable for school facilities when a school district determines that there is an inadequate supply of land

for the 10-year period covered by the adopted school facilities plan, and take necessary actions, including, but not limited to, adopting appropriate zoning, aggregating existing parcels in separate ownership, or adding one or more sites designated for school facilities to the Urban Growth Boundary, pursuant to applicable law.

Implementation 1-B(4): Continue to cooperate in collecting a construction excise tax in accordance with Oregon Statutes to help pay for school facilities.

Implementation 1-B(5): Provide notice to school districts when considering a proposed plan, amendment, or development that may impact school capacity.

Implementation 1-B(6): If a school district adopts objective criteria in its school facilities plan to be used by the City to determine whether adequate capacity exists to accommodate projected development, utilize those criteria for purposes of evaluating applications for comprehensive plan amendments or residential land use regulation amendments. [Note: Per the Oregon Revised Statutes, the City may deny a residential development application based on a lack of school capacity only if the issue is raised by the school district, the lack of school capacity is based on a formally adopted school facilities plan and the City has considered options to address school capacity.]

Implementation 1-B(7): Work with school districts to identify barriers and hazards to children walking or bicycling to school and to develop plans for funding improvements designed to reduce such barriers and hazards.

Goal 2: For Medford's public and private educational facilities to be positive community assets.

Policy 2-A: The City of Medford shall discourage the location of primary and secondary schools in or next to industrial zoning districts or the Airport.

Policy 2-B: The City of Medford shall encourage secondary schools or higher education facilities over 10-acres in size to be located on at least one higher order street.

Policy 2-C: The City of Medford shall encourage public school districts to allow community use of school facilities when the use does not conflict with the primary use of the facility and student safety.

Goal 3: Promote ongoing partnerships with public, private and alternative educational providers in Medford to deliver varied life-long learning opportunities.

Policy 3-A: The City of Medford shall support life-long learning and training programs with high schools, the community college, and the university.

Exhibit C

Medford School District 549C Long Range Facilities Plan, August 11, 2014 Update

(Hard copy available at the Planning Department)

Electronic version can be found at the link below:

<http://www.ci.medford.or.us/page.asp?navid=3498>

Exhibit D

Minutes, Planning Commission, 7/23/2015

Excerpt

50.1 CP-15-078 Consideration of a Class-A major legislative amendment of the Medford Comprehensive Plan to make the following revisions to the Public Facilities Element: (1) Adopt by reference and incorporate into the City of Medford Comprehensive Plan Facilities Element the Medford School District 549C School District Long Range Facilities Plan, August 11, 2014 Update, along with findings, conclusions and appendices; (2) Provide revisions to the goals, policies and implementation measures of the School section of the Public Facilities Element. (City of Medford, Applicant)

Aaron Harris, Planner II, reviewed the background, history, significant plan changes, read the comprehensive plan amendment criteria and gave staff's recommendation. He also noted that there was a new agreement between the District and the Hull Road property owners, whereas the staff report indicated that it had expired.

Commissioner Mansfield asked if there was anything in the documents presented that requires or indicates any promises by the City to include the Hull Road property into the urban growth boundary at any time in the future? Mr. Harris responded that there was not any such indication or promise.

Mr. Huttli confirmed Mr. Harris' question regarding the new agreement between the District and the Hull Road property owners: as new factual information it belong the Commission Report to the Council.

Commissioner McKechnie asked if the Medford School District serves just the students that live in the City of Medford boundaries or does it serve the middle of Jackson County? Commissioner Mansfield reported that it covers out to Ruch, Jacksonville, and areas outside the city limits of Medford. Chair McFadden stated that it does not include most of Central Point and everything south of Barnett.

Chair McFadden asked if this motion needs to indicate forwarding this to the City Council? Mr. Harris stated that it does need to indicate that.

The public hearing was opened.

a. Michael Oliver. 3285 Hillcrest Road, Medford, Oregon, 97504-9318. Mr. Oliver reported that he is the Vice President of Hillcrest Corporation. He is present this evening to submit their letter from their legal team that suggests that the Planning Commission continue this hearing until the City adopts its UGB amendment. The continuance will

create the time essential for the City and the School District to properly coordinate and incorporate school planning needs into the more comprehensive urban growth and service delivery analysis that occurs through the UGB process. Furthermore, their counsel believes that several technical issues with the School Facilities Plan as submitted exists and needs to be resolved prior to Planning Commission action. Mr. Oliver apologized that their legal counsel was not present to address the technical issues however, they were under the impression that all matters related to the UGB process, growth and public services would occur in a fair manner with no urban reserve area being given special consideration. Their attorneys will be present at the August 6, 2015, UGB hearing with the City Council to address this and other issues and can be present at a continuance of this meeting if the Planning Commission desires. Mr. Oliver submitted the letter into the record.

Commissioner Mansfield asked if it makes a difference that the Planning Commission is a recommending body? Mr. Oliver replied he did not believe so. He is not the technical person but their legal counsel has suggested this process be continued until after the UGB process goes forward.

The Planning Commission meeting took a recess at 5:56 p.m. for the Planning Commission to review the submitted documents to be entered into the record.

The meeting reconvened at 6:03 p.m.

Chair McFadden commented that, in his opinion, the first stated reason for continuance that the School Facilities Plan is deficient because the Medford School District 549C has not properly coordinated with the City. He said that is what this process (i.e., tonight's hearing) is. He commented on the other points in the letter.

Mr. Huttli stated Chair McFadden's comments being his opinion and not those of the Planning Commission are appropriate. He suggested it would make sense for the School District to give their response to the points raised in the letter.

Commissioner D'Alessandro asked Mr. Oliver if he had the latitude to elaborate on the impacts for Hillcrest Orchards. Mr. Oliver stated that this meeting is not about the UGB amendment process, but he believes any recommendation put forth with this School Facilities Plan could impact the UGB amendment process in an unfair manner.

Commissioner Mansfield asked if there was more behind the request for a continuance than his attorney's objection to the placement of a school in the MD-2 area? Mr. Oliver offered his opinion that it is not good school policy putting a school site in the middle of a place where there is no student population.

b. Thad Pauck, 201 W. Main Street, no. 5A, Medford, Oregon, 97501. Mr. Pauck is one of the attorneys for the Medford School District 549C. He said he not had an opportuni-

ty to review the Mr. Oliver's letter in detail. He said these are two separate processes (the facility plan adoption and the UGB amendment). The Facilities Plan that is before the Planning Commission tonight for recommendation to the City Council is basically the School District identifying what it feels to be appropriate sites for the location of a future school; it does not require that the City bring that property into the UGB or otherwise make any recommendation for them. All the District is doing is identifying suitable school sites based on its population projects. Their population projects show in the MD-2 area a need for a school at some point in the future. He reported that other property owners in other areas of the City have approached the District over the past couple of years and made offers to donate property in the event their property was brought into the UGB. The School District has turned those offers down because the population projections did not indicate that would be a need for a future school site.

Mr. Huttl stated that the first stated reason to continue this hearing was that there was not any coordination with the City. Mr. Pauck reported that there was a lot of coordination. The coordination began in 2010 before the 2012 Plan was adopted which did not occur until the end of 2013. Throughout that period there had been communication and coordination with City officials on this latest reiteration.

John Adam, Senior Planner, reported that the City Council has a vigorous schedule to hear the Urban Growth Boundary amendment starting on August 6, 2015. They want to have three consecutive weeks of meetings. Once the Planning Commission makes a recommendation on this facilities plan it probably will not go to the Council until it has completed its business with the Urban Growth Boundary amendment. Mr. Huttl stated that also may be a question for City administration that puts together the agenda for the City Council.

Commissioner Fincher stated that the last time the Planning Commission went through this process the Planning Commission was presented with the School District's Plan and told that it needed to be a part of the City's Comprehensive Plan as part of the process. It was not necessarily an endorsement. He asked if staff could refresh the Planning Commission as to why this is a necessary step in the process and goes through the Planning Commission. Mr. Adam stated that the State Statutes require that the City adopt the School Facilities Plan into their Comprehensive Plan.

Mr. Adam reported that given some of the delicacies of the UGB process that staff would be fine with a continuance to give everyone time to read and respond to Mr. Oliver's submitted letter.

Mr. Huttl stated that the Planning Commission could close the hearing and continue for deliberation and not take any more testimony.

Commissioner Pulver stated that it is his opinion that this is the School District's document and that the Planning Commission is not necessarily endorsing it. The Planning

Commission is acknowledging that it exists and incorporating into the City's Comprehensive Plan. He said if someone has objections to a school site it should be taken up with the School Board. He does not believe that is what the Planning Commission is being tasked to do tonight. He appreciates the letter submitted into the record. It is his opinion that the Planning Commission should recommend this to the City Council for approval and move on with tonight's agenda.

The public hearing was closed.

Motion: The Planning Commission adopts the findings as recommended and directs staff to prepare a Commission Report per the staff report dated July 13, 2015, including Exhibits A through F.

Moved by: Commissioner Mansfield

Seconded by: Commissioner Pulver

Friendly amendment made by Commissioner Pulver: That the Commission report to the City Council reflect the updated Hull Road agreement.

Commissioner Culbertson stated that he represented a group last year when this was brought up with the School District and it was tabled then in direct opposition to the Hull Road property. There is language that he does not think he can be impartial about so he will abstain from the vote.

Roll Call Vote: Motion passed, 6-1-1, with Commissioner Fincher voting no and Commissioner Culbertson abstaining.

Minutes, Planning Commission Study Session, 6/22/2015

Excerpt

1. CP-15-078 Medford School District Long Range Facilities Plan Update

John Adam, Senior Planner, stated that the Medford School Districts Facilities Plan was adopted approximately a year ago. There have been several changes in some of their facilities planning.

Aaron Harris, Planner II, reported that the proposal is to adopt by reference and incorporate the undated School Facilities Plan into the Comprehensive Plan Public Facilities Element. ORS 195.110 School facility plan for large school districts requires inclusion as element of the comprehensive plan, must cover a period of at least 10 years and specific plan elements including population projections, identification of desirable school sites, descriptions of physical improvements needed to existing schools, financial plans to meet school facility needs, analysis of the alternatives to new school construction and major renovation, analysis of measures to increase efficient use of school sites. It also requires ten-year improvement plans and site acquisition schedules and programs.

The Long-Range Facilities Plan 2013 Update was adopted January 16, 2014. The most notable issue in the 2012 Plan was the Hull Road property. The School District found this property to be a desirable school location. The City had issue with this site because it was located outside the urban growth boundary.

Significant changes between the 2012 Plan and the 2014 Plan include existing school capacities, facilities' needs, costs and recommendations for future facilities. The 2014 Plan includes an adjusted capacity. The adjusted capacity accounts for partnerships and district programs. These include fine and performing arts, physical education, special education, tutorial support and career and technical education programs.

The capital improvement plan takes into account large projects that cannot be funded from the maintenance operating budget. It takes into account projects such as roof replacements, mechanical and electrical system upgrades, parking lot and sidewalk replacements, painting sports fields and track replacements and building renovations. It does not include new construction or major renovation projects. There is an overall increase in cost of approximately 48 percent.

Facility needs in the 2012 Plan states they will need two elementary schools (east side/west side). The east side school is located in the Southeast Plan map area and it is identified in the Southeast Plan. The west side school was the Hull Road property. The 2014 Plan provides multiple options for each of the three phases (1 to 5 years, 10 years, and 20 years). The options in the three phases include boundary adjustments, adding modular units to existing school sites, relocating elementary school students to secondary schools that have extra capacity, expanding existing schools, and adding new schools. The 2014 Plan specifically notes the Coker Butte property and the Southeast Plan property as desirable locations for new schools.

Commissioner Mansfield asked if the same problem exists that the School District wants the Hull Road property and the City has not agreed that the urban growth boundary should be expanded to include that property? Mr. Adam explained that the Hull Road property was not in the candidate urban reserve which was the point of contention.

Commissioner Fincher asked what are the odds of the area of MD-2, where the School District is proposing a school site, coming into the urban growth boundary in the next 10 years? Mr. Harris reported that it is likely to be adopted. Mr. Adam stated that the area that includes the school site was in the Planning Commission's recommendation to the City Council.

Brad Earl, Chief Operations Officer, Medford School District 549C, stated that if development starts going in that area they are going to need a school sooner than later. Most of the projected growth and current growth has been on the east side. They have pressure on Lone Pine, Abraham Lincoln, all the schools in that area are full. They are expanding into full day kindergarten next year. They are installing two modular units on the Lone Pine campus. As they look at potential growth they need an elementary school if they stay with the current K-6 in elementary then 7th and 8th grade in the middle school model. If they go to a K-5 model and a 6th-8th they will need a middle school on that side of town. They will need these within seven years.

Commissioner Fincher asked if staff foresees the urban growth boundary extending west in order for the School District to fulfill their growth need in seven years in that area? Mr. Adam stated that when the decision was before the City Council that information was put forward by certain parties. Whether the Planning Commission acknowledged and incorporated it into their recommendation at that time or not, it was potentially there. The question on the table is before the City Council and how much does that affect their decision.

Mr. Harris asked if someone from the Medford School District 549C speak to the capital improvements that were taken from the 2012 and 2014 Plans. Mr. Earl stated there

were a couple of things that happened. One of the things is that they included computer and server upgrades. The second thing is since the Plan was adopted they have implemented a construction excise tax. It is projected to bring approximately \$750,000 next year to the District. All that money has to be used for capital improvements.

Commissioner D'Alessandro asked if the schools on the west side such as Jefferson and Washington are going to be able to maintain capacity? Mr. Earl stated right now they have capacity in those locations. They were able to expand into full day kindergarten in all the west side locations without adding modulars except for one. They did have to add a unit at Jackson. If growth starts going to the west they will need schools on the west. That is one of the reasons Kings Highway property was ruled out by them because they have not seen growth out there. Medford School District's boundary ends at South Stage Road.

Exhibit E

DLCD Comments

Aaron J. Harris

From: LeBombard, Josh <josh.lebombard@state.or.us>
Sent: Monday, July 06, 2015 9:29 AM
To: Aaron J. Harris
Subject: RE: CP-15-078 Affected Agency Routing Memo

Thanks. When's the hearing for this?

Josh

From: Aaron J. Harris [mailto:Aaron.Harris@cityofmedford.org]
Sent: Monday, July 6, 2015 9:26 AM
To: LeBombard, Josh
Subject: RE: CP-15-078 Affected Agency Routing Memo

Hi Josh,

I will forward this comment along to the school district's representative. I have not received any comments in response to your previous questions.

-Aaron

From: LeBombard, Josh [mailto:josh.lebombard@state.or.us]
Sent: Monday, July 06, 2015 9:20 AM
To: Aaron J. Harris
Subject: RE: CP-15-078 Affected Agency Routing Memo

Aaron,
I just read the description of the Hull Road property again. The description mentions that the site is outside of the UGB but there is no mention of the urban reserve. At a minimum, it should state the property is outside of both the UGB and the urban reserve.

Also, any updates on my previous questions?

Josh

From: Aaron J. Harris [mailto:Aaron.Harris@cityofmedford.org]
Sent: Wednesday, June 10, 2015 1:23 PM
To: LeBombard, Josh
Subject: RE: CP-15-078 Affected Agency Routing Memo

Sounds good, Josh. I've emailed your questions/comments over to Thaddeus.

-Aaron

From: LeBombard, Josh [mailto:josh.lebombard@state.or.us]
Sent: Wednesday, June 10, 2015 12:47 PM

To: Aaron J. Harris
Subject: RE: CP-15-078 Affected Agency Routing Memo

Thanks. He's not likely to know the answer to the last question. If you can't dig that up, I'll look it up, just let me know.

Josh

From: Aaron J. Harris [<mailto:Aaron.Harris@cityofmedford.org>]
Sent: Wednesday, June 10, 2015 12:46 PM
To: LeBombard, Josh
Subject: RE: CP-15-078 Affected Agency Routing Memo

Josh,

I will forward your questions to the School Districts liaison, Thaddeus Pauck, and respond with answers as soon as possible.

-Aaron

From: LeBombard, Josh [<mailto:josh.lebombard@state.or.us>]
Sent: Wednesday, June 10, 2015 12:35 PM
To: Aaron J. Harris
Subject: RE: CP-15-078 Affected Agency Routing Memo

Aaron,

A few comments and questions at this point:

1. Figure 2- Candidate Urban Reserve. The map has pen marks on it illustrating properties on the West side. This should be replaced with a simple map depicting the Urban Reserves as adopted and acknowledged without the pen illustrations (looks unprofessional).
2. Johnson Reid- enrollment forecasts. What population projection was this based off of?
3. Do you know the zoning and NRCS soils classification for the Hull Road property? I believe this is EFU and has good quality soils (Class I-IV) which would make it last priority for inclusion in a future UGB amendment.

Thanks,
Josh

Josh LeBombard | Southern Oregon Regional Representative
Community Services Division
Oregon Dept. of Land Conservation and Development
Southern Oregon Regional Solution Center
c/o Jobs Council, Southern Oregon University
100 E Main Street, Suite A | Medford, OR 97501
Cell: (541) 414-7932
josh.lebombard@state.or.us | www.oregon.gov/LCD

From: Aaron J. Harris [<mailto:Aaron.Harris@cityofmedford.org>]
Sent: Wednesday, June 10, 2015 11:04 AM
To: LeBombard, Josh
Subject: RE: CP-15-078 Affected Agency Routing Memo

Greetings Josh,

I've attached the 2012 facilities plan for your review. I think the main change in the Hull Road property description is that the 2012 plan proposes this property as an ideal candidate for a new elementary school on Medford's west side and proposes amendments to the urban growth boundary to include the site. The 2014 plan acknowledges the City's lack of support for this proposal and categorizes the Hull Road property only as a potential long range option. In the 2012 plan, please see page 47 (although a word search of the document will identify many other references to the property). In the 2014 plan, please see page 17.

Best,
Aaron

From: LeBombard, Josh [<mailto:josh.lebombard@state.or.us>]
Sent: Wednesday, June 10, 2015 10:04 AM
To: Aaron J. Harris
Subject: FW: CP-15-078 Affected Agency Routing Memo

Aaron,
Good morning. Can you send me the text regarding the Hull Road property as it was before the current version? I'd like to know, specifically, how the description of it has changed. It's been a long time since I attended the City Council meeting on this.

Josh

Josh LeBombard | Southern Oregon Regional Representative
Community Services Division
Oregon Dept. of Land Conservation and Development
Southern Oregon Regional Solution Center
c/o Jobs Council, Southern Oregon University
100 E Main Street, Suite A | Medford, OR 97501
Cell: (541) 414-7932
josh.lebombard@state.or.us | www.oregon.gov/LCD

From: Nancy H. Abrahamson [<mailto:Nancy.Abrahamson@cityofmedford.org>]
Sent: Monday, June 8, 2015 1:51 PM
To: LeBombard, Josh; City Manager's Office
Subject: CP-15-078 Affected Agency Routing Memo

Nancy Abrahamson
Administrative Support Tech.
Medford Planning Department

Exhibit F

1000 Friends of Oregon Comments

Aaron J. Harris

From: Greg Holmes <greg@friends.org>
Sent: Wednesday, June 24, 2015 8:14 PM
To: Aaron J. Harris
Subject: Re: Medford School District Facilities Plan - Request for Comment

Aaron:

Thank you for the opportunity to comment on the latest revision of the Medford School District's Long Range Facilities Plan. As you know, I was very much involved in the city's adoption process of the last revision to this document.

With the one exception noted below, we have no concerns with the current revision. The MD-2 property, which is within the urban reserve area and currently being considered for inclusion in the UGB, appears to have all of the appropriate characteristics to be considered as a preferred site for a new school--not least of which is a letter of intent for a donation and the fact that it is already in one of Medford's urban reserve area. The focus on purchasing or otherwise acquiring other lands within the urban growth boundary or urban reserve areas is also appropriate.

On the other hand, we were dismayed to see that the Hull Road Property that was included in the last revision as a "desirable site" remains in this plan, albeit now only as a "Future School Site Option." During the process of adopting the last revision of the facilities plan into the Comprehensive Plan the Medford City Council disagreed with the District's conclusion that the Hull Road site was a desirable location, and placed the following clearly worded statement in the Comprehensive Plan:

The City of Medford does not concur with the Medford 549C School District's finding that Site 5 from the Medford School District 549C Long-Range Facilities Plan, May 15, 2012 Update is a desirable west side school location. A determination that Site 5 is a desirable location for a west side school(s) cannot be rendered by the City of Medford at the present time. Such a determination can be made by the City only after an "alternatives analysis" of land within and outside the Urban Reserves based on the "priority of land scheme" and the land use decision process in Oregon Urban Growth Boundary (UGB) expansion laws and rules are conducted.

Additionally, the Greater Bear Creek Valley Regional Plan, Chapter 5, Monitoring and Implementation (Section 5.1.2), provides that UGB expansion into land not designated as an Urban Reserve will require a Regional Plan 'Minor' or 'Major' amendment prior to or concurrent with any other process. Section 5.2.4 of the Regional Plan identifies that a 'Major' amendment is any amendment that does not meet the definition of a 'Minor' amendment. Since the 80-acre size of Site 5 exceeds the 50-acre maximum for a 'Minor' amendment, such a proposal would be deemed a 'Major' amendment. Processing amendments to the adopted Regional Plan are the responsibility of Jackson County and can only be proposed by the governing authority of a participating RPS jurisdiction. Approval of a 'Major' amendment of the Greater Bear Creek Valley Regional Plan is also subject to providing corrective measures and plan adjustments per Section 4.4 of the Regional Plan. The City could concur with the suitability of Site 5 only after a 'Major' amendment of the Regional Plan was adopted and associated corrective measures were approved by the appropriate approving authorities.

In addition, any consideration of the Medford 549C School District's proposal to bring its desirable site into the City's UGB runs directly counter to the City's long-established plan for its growth. After lengthy deliberations and public hearings by both the Planning Commission and the City Council, the City decided that it would not plan to expand into the Exclusive Farm Use (EFU)-zoned land to the west of its current UGB. For the City, this decision is fundamental to its compliance with the Statewide Planning Goals that seek to deter the expansion of urban development into immediately adjacent agricultural land.

Because this site is still listed as an option in the facilities plan, we recommend that the city once again include language in the Comprehensive Plan amendment that acknowledges the district's choice to continue to include the site as an

option, but makes clear that the city's policies make it extremely unlikely that that option will ever be exercised. Something like the following, which is modified from the above, should be considered:

The city of Medford does not concur that the Hull Road Property is likely to be a realistic option for a future school site. In order to be approved, a school site that will serve primarily urban residents must be located within an urban growth boundary. Because this site is not within Medford's Urban Reserve it is highly unlikely that it will be added to the urban growth boundary within the next several decades.

The Greater Bear Creek Valley Regional Plan, Chapter 5, Monitoring and Implementation (Section 5.1.2), provides that UGB expansion into land not designated as an Urban Reserve will require a Regional Plan 'Minor' or 'Major' amendment prior to or concurrent with any other process. Section 5.2.4 of the Regional Plan identifies that a 'Major' amendment is any amendment that does not meet the definition of a 'Minor' amendment. Since the 80-acre size of this property exceeds the 50-acre maximum for a 'Minor' amendment, such a proposal would be deemed a 'Major' amendment. Processing amendments to the adopted Regional Plan are the responsibility of Jackson County and can only be proposed by the governing authority of a participating RPS jurisdiction. Approval of a 'Major' amendment of the Greater Bear Creek Valley Regional Plan is also subject to providing corrective measures and plan adjustments per Section 4.4 of the Regional Plan. The City could concur with the suitability of this site only after a 'Major' amendment of the Regional Plan was adopted and associated corrective measures were approved by the appropriate approving authorities.

In addition, any consideration of a proposal by the Medford 549C School District to bring this site into the City's UGB would run directly counter to the City's long-established plan for its growth. After lengthy deliberations and public hearings by both the Planning Commission and the City Council, the City decided that it would not plan to expand into the Exclusive Farm Use (EFU)-zoned land to the west of its current UGB. For the City, this decision is fundamental to its compliance with the Statewide Planning Goals that seek to deter the expansion of urban development into immediately adjacent agricultural land.

Thank you for consideration of these comments.

Greg

Greg Holmes | Southern Oregon Planning Advocate
1000 Friends of Oregon | PO Box 2442 | Grants Pass, OR 97528
greg@friends.org | 541.474.1155 | <http://www.friends.org/>
On 6/12/2015 11:05 AM, Aaron J. Harris wrote:

Greetings Greg,

Attached is the Medford School District Long Range Facilities Plan request for agency comment notice. Please contact me if you have any questions or comments you would like to provide.

Be well,

Aaron Harris | Planner II / Comprehensive Planning
City of Medford Planning · 200 South Ivy Street · Medford, Oregon 97501
Tel. 541.774.2380 | Fax 541.774.2564

Exhibit G

Hillcrest Corporation Comments

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July 23, 2015

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VIA HAND DELIVERY

David McFadden, Chair
City of Medford Planning Commission
c/o Planning Department
200 South Ivy Street
Lausmann Annex, Room 240
Medford, OR 97501

Re: Medford School District 549C Long-Range Facility Plan 2014 Update
City File No. CP-15-078
Request for Continuance to Address Unresolved Issues

Dear Chair McFadden and Members of the Planning Commission:

This office represents Hillcrest Corporation, the owner of approximately 200 acres of real property generally located east of Foothill Road and north of Hillcrest Road in an urban reserve enclave surrounded by the City of Medford ("City"). The purpose of this letter is to request that the Planning Commission continue its consideration of the Medford School District 549C Long-Range Facility Plan 2014 Update ("School Facilities Plan") until after the City Council has adopted the pending Urban Growth Boundary ("UGB") amendment. Failure to do so will result in a lack of agency coordination, adoption of an amendment that is not supported by an adequate factual base, and potentially, allowing the School Facilities Plan to supplant the UGB process for determining the City's urban growth decisions. Please place a copy of this letter in the official record for this matter and please provide notice of the decision and all appeal options to the undersigned.

1. Reasons to Continue the School Facilities Plan.

- A. The School Facilities Plan is deficient because the Medford School District 549C ("School District") has not properly coordinated with the City.

ORS 195.110(8)(b) requires that each large school district update its school facility plan during periodic review or more frequently by mutual agreement between the large

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Perkinscoie LLP

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district and the affected city or county. Accordingly, this process requires coordination between the school district and the affected city or county. That coordination has not occurred here. The staff report states that the School District adopted the update to the School Facilities Plan on August 11, 2014. After that adoption, the School District requested that the City initiate a General Land Use Plan amendment to incorporate the School District's School Facilities Plan. The City Council directed that staff initiate this amendment on January 15, 2015, several months after the School District had already adopted the updated School Facilities Plan. As a result, the record indicates that the School District moved forward on its own to adopt the School Facilities Plan before contacting the City. This order of events reflects a lack of coordination among the School District and the City in contravention of ORS 195.110(8)(b).

B. It is premature for the City to incorporate the School Facilities Plan into its Comprehensive Plan before the City has adopted its UGB amendment.

The City is currently considering but has not yet approved a UGB amendment, which also must be approved by Jackson County and the State. The expansion is proposed to accommodate urban needs for the projected growth of the general population, including housing, and is not limited to the specific student enrollment growth forecast that provides the basis for the School District's long range facility plan. Because the UGB amendment is proposed, in part, to accommodate housing needs for the next 20 years, another statute (ORS 197.296(6)) requires that the City must include sufficient land reasonable necessary to accommodate the siting of new public school facilities and that such inclusion shall be a *coordinated* process between the public school districts and the local government that has authority to approve the UGB (being, in this case, the City and County). As a result, the decision by the City and County of whether, where, and how to expand the City's UGB will dictate those lands that are available for development with school sites over the next 20 years. Therefore, this UGB decision must precede the decision on the School Facilities Plan. Otherwise, the City and School District risk adopting a School Facilities Plan that is inconsistent with the City's identified long-term growth plan.

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David McFadden, Chair
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- C. The School Facilities Plan's projection of future school needs is not based upon an adequate factual base because the population forecast does not extend through the planning period, and there is no geospatial analysis of school need.

The School District's proposed update continues to be based on the Enrollment and Growth Forecasts prepared in December 2011 by Johnson Reid LLC attached at Appendix C to the School Facilities Plan. The School District has not provided any new or updated forecast. While the forecast projects enrollment out to 2030, the proposed School Facilities Plan update has been extended to the year 2035 without any additional evidentiary support or explanation of how the extension properly derived population growth by school age group in accordance with ORS 195.110(5)(a). Previously, Chapter 4 of the District's 2012 facility plan at subsection (B)(2), "Enrollment Forecast by School", provided a detailed explanation of the Johnson Reid analysis to the year 2030. The explanation, which has been removed from the proposed update, also stated that the study data for the forecast were also depicted geo-spatially for elementary, middle and high schools on maps included as Figures 5 through 10 in the 2012 update. The explanation and all of the geo-spatial graphs and mapping have been removed from the 2014 facility plan update. Removal of the data effectively masks the overall picture of the School District's need for future school sites.

- D. The true need for a future elementary school site is in the southeastern area of the City, not on the MD-2 property.

The School Facilities Plan reports actual 2013 enrollment which tracks well with the Johnson Reid forecast. As forecasted, Wilson Elementary saw a decrease in enrollment from 485 students in 2011 to 465 students in 2013 (minus 20). In that period Kennedy Elementary grew by 48 students (from 519 to 567), Abraham Lincoln Elementary grew by 16 students (from 449 to 465), Lone Pine Elementary grew by 56 students (from 564 to 620), and Hoover Elementary by 41 students (603 to 644).

The School Facilities Plan indicates that Abraham Lincoln has available capacity to accommodate 96 additional students, Wilson has capacity for an additional 26 students, and that Kennedy has capacity to accommodate another 41 students. Lone Pine enrollment is reported to exceed capacity by 82 students and Hoover enrollment exceeded capacity by 60 students. As projected by Johnson Reid, enrollment growth is

David McFadden, Chair
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most severely affecting Lone Pine and Hoover elementary schools on the east side of Medford. By contrast, the most northerly facilities on the east side (Wilson, Kennedy, and Abraham Lincoln) are experiencing fewer enrollment pressures and have more capacity. In fact, Abraham Lincoln's service area includes neighborhoods that are located 4 to 5 miles away in east Medford which are much closer to both the existing Lone Pine school and the designated future school site in the Southeast Plan area. Therefore, construction of the planned school in the Southeast Plan area (or even on Hillcrest's property in MD-4) would provide adequate capacity in a more suitable location to serve students now being bussed from east Medford to Abraham Lincoln in north Medford.

If there are other enrollment growth drivers in north Medford, the School District should properly identify the source and why an adjustment in service boundaries between Abraham Lincoln, Kennedy, and Wilson elementary schools would not solve that problem given the projected drop in enrollment at Wilson elementary and the relatively high available capacity for those three schools in northeast Medford. As Abraham Lincoln is located on a 20-acre parcel, the School District should further document why that property is not suitable to accommodate an expansion or addition of modular buildings that the School District has recently obtained conditional use permit approval to provide additional capacity to other smaller school sites such as Lone Pine. There are also vacant residentially zoned lands located in the urban growth boundary nearby Abraham Lincoln to the west and to the north which could be acquired to provide a new elementary school site so that the Abraham Lincoln site could be utilized for a new middle school given that large parcel size. These alternatives need to be analyzed before a UGB amendment can be justified under ORS 195.110 to provide additional school sites to serve north Medford.

Then, if it is found that there are no suitable alternatives within the UGB, the School District in cooperation with the City and County will need to establish why a site (MD-2) located so close to the School District's service boundary and adjacent to the urban reserve boundary is an appropriate location. Lands to the west from the proposed MD-2 site across Highway 62 and north of Vilas Road are all within the Central Point School District Boundary. To the west of Highway 62 and south of Vilas Road, lands are within the School District boundary but are predominated by industrial, heavy commercial, and airport uses. There are no homes there. The northerly boundary line for the School

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District is located approximately two miles north of the identified "desired" school site but the intervening area is sparsely populated, predominately in farm use, and outside the City's adopted urban reserve areas. The School District's eastern boundary is approximately two miles to the east of the MD-2 desired site. Similarly, the intervening area is sparsely populated and predominately in farm use below Foothill Road and predominately in large rural residential estate lots in the hills above Foothill Road. Consequently, the desired school site will only be conveniently located to serve the immediately adjacent "Coker Community" neighborhood that could only be built if the City and County mutually agree to extend the UGB in that direction, an outcome that is far from certain at this stage.

In sum, the need for a school site in north Medford should follow from a City-initiated growth study pursuant to ORS 197.296 and the related UGB expansion process, rather than the more narrowly focused specialized land needs of a large school district under ORS 195.110.

E. The School Facilities Plan has failed to adequately evaluate alternative school sites.

The School Facilities Plan does not include an evaluation of alternative suitable school sites as is necessary under ORS 195.110(6), either within or outside the UGB. In response to the City-initiated UGB amendment, the School District's primary role is to provide guidance to the City on where future school facilities should be accommodated in the event the City ultimately expands into any of the possible inclusion areas that are initially identified. There are other candidate growth areas that have been proposed and/or recommended to date in those proceedings but the School District has made recommendation that only MD-2 will need a school site. The School District may be losing its best opportunity to secure some alternative options on lands that may come in addition to, or instead of, MD-2 by not more carefully considering the consequences of additional growth in the alternative areas. To the extent that construction of a new school on the gifted land will divert funding for construction of additional capacity on lands already in the UGB that the School District already owns or could acquire, there would also be an adverse impact on the efficiency of the City's existing land base to accommodate future growth. School district choice is a significant factor in choosing a home. Siting new schools away from the existing vacant and redevelopable residential land base in east Medford will lead to more overcrowding of the nearby schools and/or

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require the continuance of bussing students long distances. That, in turn, will erode the attractiveness of the affected neighborhoods to families with school aged children – thereby reducing the likelihood that the City's existing buildable residential lands in east Medford will be efficiently utilized. It also will induce more vehicle miles travelled and morning peak hour and overall maintenance impacts to the City's street system, all adverse impacts to the City.

- F. The fact that the owner of MD-2 has offered to donate the school site should not drive the City's decisions to approve the School Facilities Plan or the UGB amendment.

Finally, the City should not approve the School Facilities Plan (or the UGB amendment) simply because the owner of MD-2 has entered an agreement to donate the land to the School District. A donation of "free" land does not mean that there will be no cost to the School District. The terms of the gift pledge agreement provide that the School District shall cooperate with and shall waive remonstrance against "any" reimbursement district that may affect the Gift Property. The agreement does not identify in any way which reimbursement districts may be needed nor does it quantify or in any way cap future costs that the School District will be obliged to accept under the terms of the agreement. Reimbursement districts are commonly used for significant off-site transportation facility improvements (e.g., intersection and corridor improvements, signalization, etc...), other infrastructure (e.g., extending existing water main systems 2,000+ feet east from Crater Lake Avenue), stormwater systems, and the other major costs that may need to be front-ended by developers. The proposed community plan indicates a linear park system is to be provided along an existing MID open irrigation canal – which runs approximately 3,300 linear feet through the existing property. The irrigation district will very likely require that the canal be piped if public access and trails are proposed along its facility. The gifted land may then be subject to sharing the cost of that and other projects through any future reimbursement district.

2. Conclusion

For these reasons, the Planning Commission should continue this matter until the City Council adopts its UGB amendment. This continuance will ensure that the City and School District properly coordinate with one another and incorporate school planning

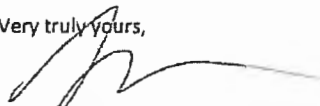
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David McFadden, Chair
July 23, 2015
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needs into the more comprehensive urban growth and service delivery analysis that occurs through the UGB process.

Thank you for your consideration of the points in this letter.

Very truly yours,



Steven L. Pfeiffer

cc: Jim Huber (via email)
Aaron Harris (via email)
Lori Cooper (via email)
Client (via email)

Exhibit J
Staff Report

GIFT PLEDGE AGREEMENT

This Gift Pledge Agreement is entered into this 13th day of September, 2014, by and between Coker Butte Development, LLC, an Oregon limited liability company and O'Side Industry, LLC, a California Limited Liability Company (Coker Butte Development, LLC and O'Side Industry, LLC are hereinafter collectively referred to as "Coker Butte"), and Medford School District 549C (hereinafter referred to as the "District")

WHEREAS, Coker Butte owns real property in Jackson County, Oregon that would be beneficial for future District expansion;

WHEREAS, Coker Butte desires to convey real property to the District as a gift on certain conditions and following certain conditions precedent,

WHEREAS, the District desires to receive a gift of real property from Coker Butte in accordance with the terms of this agreement,

WHEREAS, the parties acknowledge that there are various conditions precedent that must occur prior to any gift conveyance to the District and that District's cooperation and support for those conditions shall be necessary;

NOW, WHEREFORE, the parties agree as follows:

1. As provided herein, Coker Butte agrees to gift approximately 20 acres of real property (the "Gift Property") and 20 acres of Coker Butte's existing irrigation rights to the District within one year of the completion of all Conditions Precedent. For purposes of this Agreement, "Conditions Precedent shall mean all of the following: a) adoption of the Gift Property as part of the District's Facilities Plan as provided in Paragraph 2; b) District support as provided in Paragraph 4; c) inclusion of the entire 210-acre Coker Butte property, described on Exhibit D, into the Urban Growth Boundary of the City of Medford; d) annexation to the City of Medford and zone change of the Gift Property and any partition, subdivision, or property line adjustment necessary to create a discrete and transferable 20 acre unit of real property in substantially the location and dimensions shown on Exhibit A; e) District cooperation with Coker Butte as provided in Paragraph 3. Coker Butte shall have the right, but not the obligation, to apply for a zone change on the Gift Property prior to conveyance to the District. Coker Butte may seek any zoning designation, so long as schools are a permitted use in the new zone.
2. Within 45 days of execution of this Agreement, the District shall initiate efforts to identify the Gift Property as a suitable site for its Facilities Plan and begin the process of formally adopting it as part of the Facilities Plan.
3. The District shall reasonably cooperate, so long as there is no cost to the District other than any costs that may be incurred with the District's obligations as set forth in Section 4 of this agreement, with any efforts of Coker Butte to secure entitlements on its property

Exhibit J
Staff Report

- described on Exhibit B, including the Gift Property, and/or to establish the value of the Gift Property by appraisal, but such efforts are not required of Coker Butte.
4. The District shall publicly express support for the inclusion of Coker Butte's portion of urban reserve area MD-3 into the Urban Growth Boundary of the City of Medford. Expression of support shall, at a minimum, include written and verbal support at each City of Medford public hearing regarding Urban Growth Boundary expansion. Coker Butte shall provide reasonable advance notice to the District for each such public hearing. However, the District shall not have any direct financial responsibilities and shall not be responsible for making any formal land use applications.
 5. Coker Butte shall gift the Gift Property to the District via bargain and sale deed. The Gift Property shall be free and clear of all encumbrances other than the normal standard exceptions.
 6. The Gift Property shall consist of 20 contiguous gross acres of raw land. Coker Butte makes no promises or warranties regarding any development rights on the Gift Property.
 7. After the conveyance of the Gift Property, the District shall cooperate with Coker Butte in granting reasonable requests for easements for access, drainage, and utilities.
 8. The District shall cooperate with and shall waive remonstrance against any reimbursement district that may affect the Gift Property.
 9. Contemporaneous with the conveyance of the Gift Property or as soon as practicable thereafter, the District shall execute Covenants, Conditions, & Restrictions ("CC&Rs"), requiring that the Gift property be used for School Purposes. "School Purposes" shall mean that the primary use of the Gift Property is for an elementary school, junior high school, high school, or District administrative offices. Following conveyance of the Gift Property to the District, the District shall have 10 years to put the Gift Property to use for School Purposes. The District may unilaterally extend its timeframe for use of the Gift Property for School Purposes for an additional 10 years by notifying Coker Butte in writing within 90 days of the expiration of the original 10 year period following conveyance of the Gift Property to the District. In the event the District fails to use the Gift Property for School Purposes within the timeframes specified herein, the District shall offer to sell the Gift Property to Coker Butte for market value at the time of the sale, based on an appraisal by a licensed appraiser acceptable to both parties. In the event Coker Butte does not purchase the Gift Property following the District's nonuse for School Purposes, the District may convey the Gift Property to another public entity, so long as it is used for park purposes. All of the foregoing shall be memorialized in the CC&Rs. The CC&Rs shall further provide for the waiver of remonstrance provided for in paragraph 8 and shall require that the Gift Property be mowed, watered, and otherwise be maintained in an attractive fashion. The CC&Rs shall benefit the property identified on Exhibit B, less the Gift Property, and shall run with the land.
 10. In the event the conditions precedent are not completed within 5 years, this Agreement shall terminate and the parties shall have no obligations to each other. Notwithstanding the foregoing, Coker Butte shall have the unilateral ability to extend the Agreement for additional terms, the sum of which shall not exceed 3 years beyond the initial term of this Agreement, provided that Coker Butte provide written notice of such extension to the District prior to the expiration of the then-current term.

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GIFT PLEDGE AGREEMENT

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DATED the day and year first above written.

CORNER BUTTE DEVELOPMENT, LLC

MEDFORD SCHOOL DISTRICT 549C

By:
Its:

By:
Its:

D'SIDE INDUSTRY, LLC

By:
Its:

Exhibit J
Staff Report

Kaiser Surveying
18754 Highway 82
Eagle Point, OR 97524

Bary D. Kaiser
R.P.L.S. OR# 82823

Phone: (541) 878-3995
Fax: (541) 878-3935
E-mail: bkaiser@earthlink.net

EXHIBIT "A"

DESCRIPTION OF A 20 ACRE PARCEL LOCATED IN THE NORTHWEST QUARTER OF
SECTION 5, T.37S., R.1W., W.M., IN JACKSON COUNTY, OREGON

Commencing at the quarter corner common to Section 5, Township 37 South, Range 1 West and
Section 12, Township 36 South, Range 1 West of the Willamette Meridian in Jackson County, Oregon,
thence along the North South centerline of said Section 5, South 0° 01' 25" West, 540.00 feet to the Easterly
Northeast corner of Parcel No. 2 of Partition Plat recorded July 14, 1993 as Partition Plat No. P-36-1993 of
"Records of Partition Plat" in Jackson County, Oregon and filed as Survey No. 13367 in the Office of the
County Surveyor; for THE TRUE POINT OF BEGINNING; thence along the Northerly boundary of said
Parcel No. 2 and the Westerly extension thereof, North 89° 50' 00" West, 747.56 feet, thence South 0° 02'
25" West, 1165.40 feet; thence South 89° 50' 00" East, 747.56 feet to intersect the said North South
centerline of Section 5, thence along said boundary, North 0° 02' 25" East, 1165.40 feet to THE TRUE
POINT OF BEGINNING.

August 13, 2014

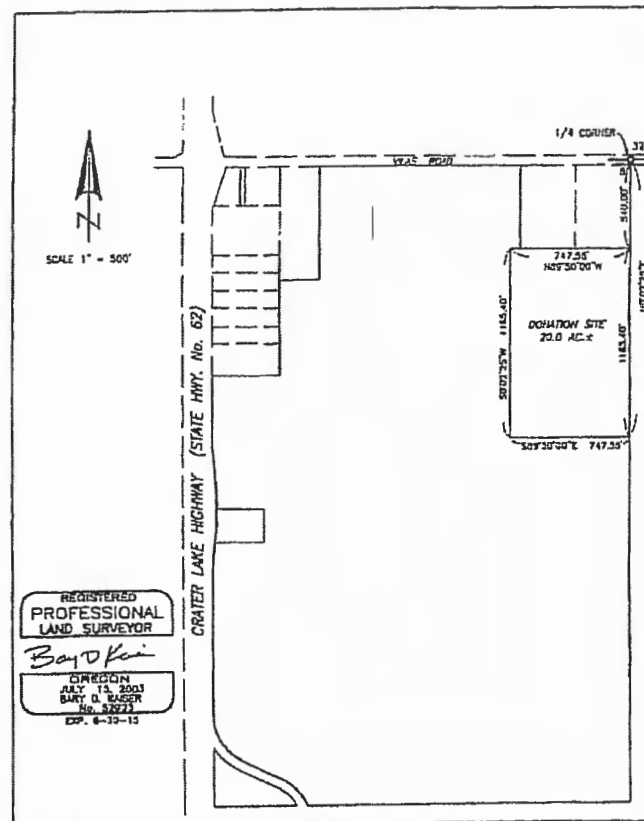


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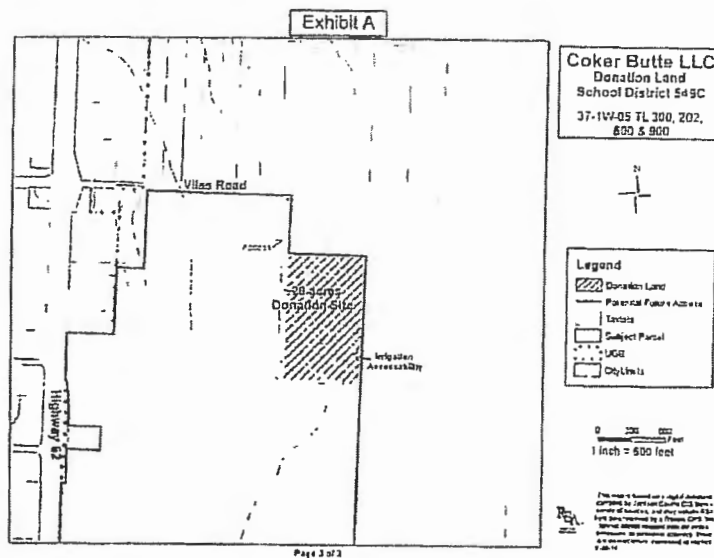


Exhibit /
Staff Report

Exhibit "B"

Part of the Two 1/2 of Partition Plat No. 9-66-1993 filed July 14, 1993, in Volume 6
Page 16, "RECORD OF PARTITION PLAT" in Jackson County, Oregon as Survey No. 12567
(Code 19-15, Account # 11-81011-1, Map 1251W63, The Lot 1500;
(Code 19-15, Account # 11-81011-2, Map 1251W63, The Lot 1501)

The North Half of the Southwest Quarter of Section 3 in Township 37 South, Range 1
West of the Willamette Meridian in Jackson County, Oregon
(Code 19-15, Account # 11-81011-1, Map 1251W63, The Lot 1500)

The South Half of the Southwest Quarter of Section 3 in Township 37 South, Range 1
West of the Willamette Meridian in Jackson County, Oregon. EXCEPTING THEREFROM THAT
portion conveyed to the State of Oregon, by and through its State Highway Commission
by deed recorded May 13, 1966 as No. 11-81011 of the Official Records of Jackson
County, Oregon. ALSO, EXCEPTING THEREFROM the following: Beginning at a point on
the easterly right of way line of the relocated Crater Lake Highway in Jackson
County, Oregon being the easterly boundary of the property described in No. 11-81011
of the Official Records of Jackson County, Oregon, said point being 100.8 feet north
of the west quarter corner of Section 3 in Township 37 South, Range 1 west of the
Willamette Meridian in Jackson County, Oregon, thence East 210.8 feet; thence North
100.8 feet; thence West 233.8 feet, more or less, to the easterly right of way line
of said Crater Lake Highway as relocated; thence South, along said right of way line
to the point of beginning
(Code 19-15, Account # 11-81011-2, Map 1251W63, The Lot 1501)

Exhibit H

Amendment and Memorandum of Understanding regarding Hull Road property

AMENDMENT AND MEMORANDUM OF UNDERSTANDING

This Amendment and Memorandum of Understanding entered into by and between Hull Ranch Road, LLC, hereinafter referred to as "Hull Road" and School District 549C, hereinafter referred to as "District".

RECITALS:

WHEREAS, Hull Road and District entered into an Option to Purchase Real Property dated February 28, 2011, hereinafter referred to as "Option";

WHEREAS, Hull Road and District entered into a First Addendum to Option to Purchase Real Property dated April 25, 2011;

WHEREAS, Hull Road and District entered into a Gift Pledge Agreement dated February 28, 2011;

WHEREAS, Hull Road and District entered into a First Addendum to Gift Pledge Agreement dated April 25, 2011;

WHEREAS, the parties desire to amend the Option and clarify the continuance of the above Agreements and dates for required actions to be completed under the Agreements.

The Parties agree as follows:

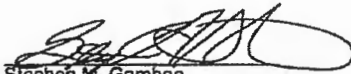
AGREEMENT:

1. The Option is in full force and effect and will continue to January 1, 2020.
2. The Option will expire on January 1, 2020, unless the Property identified in the Option, is included in the City of Medford Urban Growth Boundary or a land use application to include the Property in the City of Medford Urban Growth Boundary is pending, in which case the Option shall be continued for completion of the application process, and any appeal thereof.
3. The District has complied with Option and revised its Facility Plan pursuant to ORS 195.110 and the revised District Facility Plan has been adopted by City of Medford and included within its Comprehensive Plan on January 16, 2014.
4. The parties understand that Hull Road has sole responsibility and obligation under the Option, to apply for and have Property Identified in the Option, included within City of Medford's Urban Growth Boundary, which shall include sole responsibility for any and all costs associated with said application, and any appeal thereof.
5. The parties further understand and agree that Paragraph 3 under the Option refers to District "coordinating" with Hull Road in application described above in paragraph 4 herein, and such reference only refers to District supporting the application as a preferred site under the revised Facility Plan, and not having any actual responsibility or decision making as to timing or strategy for the application.

6. All other terms and conditions of Option and First Addendum and Gift Pledge Agreement and First Addendum remain in full force and effect.

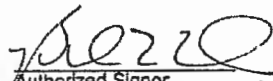
"HULL ROAD"

Hull Ranch Road, LLC, an Oregon
limited liability company


Stephen M. Gambee,
Managing Member

"DISTRICT"

School District 549C


Authorized Signor
BRAD L. EARL | CFO