PSU Population Research Center Coordinated Population Forecast - Jefferson County

# Coordinated Population Forecast





Through

# 2068

# Jefferson County

Urban Growth Boundaries (UGB) & Area Outside UGBs



Photo Credit: Lake Billy Chinook from Cove Palisades State Park. Gary Halvorson, Oregon State Archives.

# Coordinated Population Forecast for Jefferson County, its Urban Growth Boundaries (UGB), and Area Outside UGBs 2018-2068

Prepared by

**Population Research Center** 

**College of Urban and Public Affairs** 

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# How to Read this Report

This report should be read with reference to the documents listed below—downloadable on the Forecast Program website (<u>http://www.pdx.edu/prc/opfp</u>).

Specifically, the reader should refer to the following documents:

- *Methods and Data for Developing Coordinated Population Forecasts*—Provides a detailed description and discussion of the forecast methods employed. This document also describes the assumptions that feed into these methods and determine the forecast output.
- *Forecast Tables*—Provides complete tables of population forecast numbers by county and all subareas within each county for each five-year interval of the forecast period (2018-2068).

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# **Modified Methodology**

The Population Research Center, in consultation with DLCD, has identified cost savings associated with a modified methodology for the latter half of the 50-year forecast period (years 26 to 50). Based on feedback we have received, a 25-year forecast fulfills most requirements for local planning purposes and, in an effort to improve the cost effectiveness of the program; we will place more focus on years 1 through 25. Additionally, the cost savings from this move will allow DLCD to utilize additional resources for local government grants. To clarify, we use forecast methods to produce sub-area and county populations for the first 25 years and a modified projection method for the remaining 25 years. The description of our forecast methodology can be accessed through the forecast program website (www.pdx.edu/prc/opfp), while the summary of our modified projection method is below.

For years 26-50, PRC projects the county population using the annual growth rate from the 24<sup>th</sup>-25<sup>th</sup> year. For example, if we forecast a county to grow .4% between the 24th and 25th year of the forecast, we would project the county population thereafter using a .4% AAGR. To allocate the projected county population to its sub-areas, we extrapolate the change in sub-area shares of county population observed in years 1-25 and apply them to the projected county population.

# Comparison to Cycle 1 (2015-17)

To keep up to date with local trends and shifting demands, OPFP regularly updates coordinated population forecasts for Oregon's areas. Beyond the modification to our methodology and additional forecast region (from three regions to four), there are differences between the 2018 updated forecast for Jefferson County and the 2015 version. The 2018-68 forecast for Jefferson County is slightly lower that the 2015 forecast by 2043. Net in-migration is slightly lower than last round, but fewer forecasted births, which produce a more pronounced natural decrease, is the main factor for this difference. These county-level differences translate to the sub-areas. We expect the outside UGB area to capture a larger share of the county's population by 2043. The full breakdown of differences by county and sub-area is stored here: www.pdx.edu/prc/cycle-2-region-1-documents.

# **Executive Summary**

# Historical

Different parts of the county experience different growth patterns. Local trends within UGBs and the area outside them collectively influence population growth rates for the county as a whole.

Jefferson County's total population grew rapidly in the 2000s, with an average annual growth rate of 1.3 percent between 2000 and 2010 (**Figure 1**); however, some of its sub-areas experienced faster or slower population growth. The Culver UGB posted the highest average annual growth rates at 5.4 percent during the 2000 to 2010 period, while all other sub-areas experienced average annual growth rates at or below that of the county as a whole.

Jefferson County's positive population growth in the 2000s was the result of steady natural increase (more births than deaths), supplemented by periodic influxes of net in-migration. An aging population not only led to an increase in deaths but also resulted in a smaller proportion of women in their childbearing years. This, along with more women having children at older ages has led to births stagnating in recent years. Still, a larger number of births relative to deaths created a natural increase (more births than deaths) in every year from 2000 to 2016, though it is diminishing. In recent years (2014-16), net in-migration has risen and overshadowed the declining natural increase, leading to strong population growth (**Figure 12**).

### Forecast

Total population in Jefferson County as a whole as well as within its sub-areas will likely grow at a faster pace in the near-term (2018 to 2043) compared to the long-term (**Figure 1**). The tapering of growth rates is largely driven by the county's transition to a natural decrease that will cut into population growth from net in-migration. Even so, Jefferson County's total population is forecast to increase by more than 5,000 over the next 18 years (2018-2043) and by more than 8,700 over the entire 50-year period (2018-2068).

		Historical				Foi	recast		
			AAGR				AAGR	AAGR	AAGR
	2000	2010	(2000-2010)	2018	2043	2068	(2010-2018)	(2018-2043)	(2043-2068)
Jefferson County	19,009	21,720	1.3%	23,447	28,553	32,191	0.9%	0.8%	0.2%
Culver	802	1,357	5.4%	1,440	1,898	2,292	0.7%	1.1%	0.8%
Madras	6,470	6,987	0.8%	7,163	9,245	11,221	0.3%	1.0%	0.8%
Metolius	646	732	1.3%	1,076	1,349	1,500	4.8%	0.9%	0.4%
Outside UGBs	11,091	12,644	1.3%	13,767	16,060	17,178	1.0%	0.6%	0.3%

Figure 1. Jefferson County and Sub-Areas—Historical and Forecast Populations, and Average Annual Growth Rates (AAGR)

Sources: U.S. Census Bureau, 2000 and 2010 Censuses; Forecast by Population Research Center (PRC).

Note: For simplicity each UGB is referred to by its primary city's name.

# **14-Year Population Forecast**

In accordance with House Bill 2254, which streamlined the UGB process based on long-term housing and employment needs, **Figure 2** provides a 14-year population forecast (2018-2032) for the County and its sub-areas. Populations at the 14<sup>th</sup> year of the forecast were interpolated using the average annual growth rate between the 2030-2035 period. The population interpolation template is stored here: www.pdx.edu/prc/cycle-2-region-1-documents.

	2019	2022	14-Year	AAGR
	2018	2032	Change	(2018-2032)
Jefferson County	23,447	26,751	3,304	0.9%
Culver	1,440	1,713	273	1.2%
Madras	7,163	8,423	1,260	1.2%
Metolius	1,076	1,265	189	1.2%
Outside UGBs	13,767	15,349	1,582	0.8%

### Figure 2. Jefferson County and Sub-Areas—14-Year Population Forecast

Note: For simplicity each UGB is referred to by its primary city's name.

# **Historical Trends**

Different growth patterns occur in different parts of Jefferson County. Each of Jefferson County's subareas were examined for any significant demographic characteristics or changes in population or housing growth that might influence their individual forecasts. Factors analyzed include age composition of the population, race and ethnicity, births, deaths, migration, the number of housing units, occupancy rate, and persons per household (PPH). It should be noted that population trends of individual sub-areas often differ from those of the county as a whole. However, population growth rates for the county are collectively influenced by local trends within its sub-areas.

# Population

Jefferson County's total population grew from roughly 10,000 in 1975 to about 23,000 in 2017 (**Figure 3**). During this 40-year period, the county experienced high growth rates during the late 1970s, which coincided with a period of relative economic prosperity. During the early 1980s challenging economic conditions, both nationally and within the county, led to a decline in population growth rates. During the early 1990s population growth rates again increased but challenging economic conditions late in the decade again yielded declines. Following the turn of the century, Jefferson County experienced strong population growth between 2000 and 2017—averaging a 1.2 percent growth rate per year.



### Figure 3. Jefferson County—Total Population by Five-year Intervals (1975-2017)

During the 2000s, Jefferson County's average annual population growth rate stood at 1.3 percent (**Figure 4**). Culver saw the largest average annual growth rate (5.4 percent), increasing as a share of countywide population by 2 percent from 2000 to 2010. Madras, on the other hand, experienced slower

growth than the county average (0.8 percent) over the same time period, declining as a share of countywide population by almost 2 percent.

	2000	2010	AAGR (2000-2010)	Share of County 2000	Share of County 2010	Change (2000-2010)
Jefferson County	19,009	21,720	1.3%	100.0%	100.0%	0.0%
Culver	802	1,357	5.4%	4.2%	6.2%	2.0%
Madras	6,470	<i>6,9</i> 87	0.8%	34.0%	32.2%	-1.9%
Metolius	646	732	1.3%	3.4%	3.4%	0.0%
Outside UGBs	11,091	12,644	1.3%	58.3%	58.2%	-0.1%

Figure 4. Jefferson County and Sub-areas—Total Population and Average Annual Growth Rate (AAGR) (2000 and 2010)<sup>1</sup>

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

Note: For simplicity each UGB is referred to by its primary city's name.

# Age Structure of the Population

Similar to most areas across Oregon, Jefferson County's population is aging. An aging population significantly influences the number of deaths but also yields a smaller proportion of women in their childbearing years, which may result in a slowdown or decline in births. The shift in age structure from 2000 to 2010 illustrates this phenomenon (**Figure 5**). Further underscoring the countywide trend in aging, the median age in Jefferson County increased from 34.8 in 2000 to 39.6 in 2010<sup>2</sup>.

<sup>&</sup>lt;sup>1</sup> When considering growth rates and population growth overall, it should be noted that a slowing of growth rates does not necessarily correspond to a slowing of population growth in absolute numbers. For example, if a UGB with a population of 100 grows by another 100 people, it has doubled in population. If it then grows by another 100 people during the next year, its relative growth is half of what it was before even though absolute growth stays the same.

<sup>&</sup>lt;sup>2</sup> Median age is sourced from the U.S. Census Bureau's 2000 and 2010 Censuses.



### Figure 5. Jefferson County—Age Structure of the Population (2000 and 2010)

### **Race and Ethnicity**

While the statewide population is aging, another demographic shift is occurring across Oregon: minority populations are growing as a share of total population. A growing minority population affects both the number of births and average household size. The Hispanic share of total population within Jefferson County increased from 2000 to 2010 (**Figure 6**), while the White, non-Hispanic share deceased over the same time period. This increase in the Hispanic population and other minority populations brings with it several implications for future population change. First, both nationally and at the state level, fertility rates among Hispanic and minority women tend to be higher than among White, non-Hispanic women. However, it is important to note more recent trends show these rates are quickly decreasing. Second, Hispanic and minority households tend to be larger relative to White, non-Hispanic households.

					Absolute	Relative
Hispanic or Latino and Race	200	00	201	L <b>O</b>	Change	Change
Total population	19,009	100.0%	21,720	100.0%	2,711	14.3%
Hispanic or Latino	3,372	17.7%	4,195	19.3%	823	24.4%
Not Hispanic or Latino	15,637	82.3%	17,525	80.7%	1,888	12.1%
White alone	12,335	64.9%	13,429	61.8%	1,094	8.9%
Black or African American alone	43	0.2%	117	0.5%	74	172.1%
American Indian and Alaska Native alone	2,788	14.7%	3,360	15.5%	572	20.5%
Asian alone	54	0.3%	83	0.4%	29	53.7%
Native Hawaiian and Other Pacific Islander alone	28	0.1%	23	0.1%	-5	-17.9%
Some Other Race alone	11	0.1%	34	0.2%	23	209.1%
Two or More Races	378	2.0%	479	2.2%	101	26.7%

Figure 6. Jefferson County—Hispanic or Latino and Race (2000 and 2010)

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

### Births

While higher, historic fertility rates for Jefferson County mirror statewide trends in Oregon as a whole. Total fertility rates decreased slightly in Jefferson County from 2000 to 2010, and more substantially for the state, because of delayed child bearing (**Figure 7**). At the same time fertility for women over 30 increased in both Jefferson County and Oregon (**Figure 8**). Total fertility in Jefferson County remain at replacement fertility (2.1), indicating that future cohorts of women in their birth-giving years will remain stable overtime without the influence of net in/out-migration.

### Figure 7. Jefferson County and Oregon—Total Fertility Rates (2000 and 2010)

### Total Fertility Rate (TFR)

	2000	2010		
Jefferson County	2.76	2.64		
Oregon	1.98	1.81		

Sources: U.S. Census Bureau, 2000 and 2010 Censuses. Oregon Health Authority, Center for Health Statistics. Calculations by Population Research Center (PRC).



Figure 8. Jefferson County—Age Specific Fertility Rate (2000 and 2010)

**Figure 9** shows the historic and forecasted births for the county. The number of annual births from 2000-10 and 2010-15 decreased slightly. Due to a shrinking cohort of women in their birth giving years, births are expected to remain stable throughout the forecast period, despite population growth.





# Deaths

The population in the county, as a whole, is aging and contrary to the statewide trend, people of all ages are not necessarily living longer<sup>3</sup>. For both Jefferson County and Oregon the survival rates changed little between 2000 and 2010, underscoring the fact that mortality is the most stable component, relative to birth and migration rates, of population change. Average annual deaths increased slightly from 2000-10 and 2010-15 and are expected to increase steadily overtime (**Figure 10**).





# Migration

The propensity to migrate is strongly linked to age and stage of life. As such, age-specific migration rates are critically important for assessing these patterns across five-year age cohorts. **Figure 11** shows the historical age-specific migration rates by five-year age group, both for Jefferson County and for Oregon. The migration rate is shown as the number of net migrants per person by age group.

Jefferson County's migration rates reflect the patterns of man other Oregon counties. Young adults (20-29) leave the county seeking higher education and employment opportunities, but return in their 30's and 40's with their children. Retirees made up a large proportion of net in-migrants in the 00's, but they left the county shortly thereafter to areas with medical facilities and end-of-life care.

<sup>&</sup>lt;sup>3</sup> Researchers have found evidence for a widening rural-urban gap in life expectancy. This gap is particularly apparent between race and income groups and may be one explanation for the decline in life expectancy in the 2000s. See the following research article for more information. *Singh, Gopal K., and Mohammad Siahpush. "Widening rural-urban disparities in life expectancy, US, 1969-2009." American Journal of Preventative Medicine 46, no. 2 (2014): e19-e29.* 





### **Historical Trends in Components of Population Change**

In summary, Jefferson County's positive population growth during the 2000s was the result of steady natural increase and sporadic influxes of net in-migration (**Figure 12**). The larger number of births relative to deaths led to natural increase in every year from 2001 to 2016, though it is diminishing. In recent years, net in-migration has increased, overshadowing a declining natural increase and creating strong population growth.



Figure 12. Jefferson County—Components of Population Change (2001-2016)

# **Housing and Households**

The total number of housing units in Jefferson County increased rapidly during the middle years of this last decade (2000 to 2010), but this growth slowed with the onset of the Great Recession in 2008. Over the entire 2000 to 2010 period, the total number of housing units increased by 1.7 percent countywide; this was almost 1,500 new housing units (**Figure 13**). Madras captured the largest share of the growth in total housing units, adding 505 housing units and increasing are a share of total countywide housing units to over 30 percent by 2010. In terms of relative housing growth, Culver had the highest growth rate; its total housing units increased over 75 percent (207 housing units) by 2010.

Housing growth rates may differ from population growth rates because (1) the numbers of total housing units are smaller than the numbers of people; (2) the UGB has experienced changes in the average number of persons per household; or (3) occupancy rates have changed (typically most pronounced in coastal locations with vacation-oriented housing). However, the patterns of population and housing change in Jefferson County are relatively similar.

			AAGR	Share of	Share of	Change
	2000	2010	(2000-2010)	County 2000	County 2010	(2000-2010)
Jefferson County	8,319	9,815	1.7%	100.0%	100.0%	0.0%
Culver	275	482	5.8%	3.3%	4.9%	1.6%
Madras	2,465	2,970	1.9%	29.6%	30.3%	0.6%
Metolius	224	304	3.1%	2.7%	3.1%	0.4%
Outside UGBs	5,355	6,059	1.2%	64.4%	61.7%	-2.6%

### Figure 13. Jefferson County and Sub-Areas—Total Housing Units (2000 and 2010)

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

Note: For simplicity each UGB is referred to by its primary city's name.

Average household size, or PPH, in Jefferson County was 2.7 in 2010, a slight decline from 2000 (**Figure 14**). Jefferson County's PPH in 2010 was higher than for Oregon as a whole, which had a PPH of 2.5. PPH varied somewhat across the county's UGBs in 2010, with Culver recording the highest PPH of 3.1.

Occupancy rates tend to fluctuate more than PPH. This is particularly true in smaller UGBs where fewer housing units allow for larger relative changes in occupancy rates. From 2000 to 2010 the occupancy rate in Jefferson County decreased slightly (**Figure 14**). A drop in occupancy rates was uniform across all sub-areas, with Madras and Metolius recording larger declines of 6.8 percent and 4.6 percent, respectively.

	Persons Per Household (PPH)				Occupancy R	late
	2000	2010	Change 2000-2010	2000	2010	Change 2000-2010
Jefferson County	2.8	2.7	-4%	80.9%	79.4%	-1.5%
Culver	2.8	3.1	11%	92.4%	90.5%	-1.9%
Madras	3.2	2.7	-15%	92.7%	85.9%	-6.8%
Metolius	2.8	2.6	-7%	97.3%	92.8%	-4.6%
Outside UGBs	3.0	2.6	-11%	74.1%	74.6%	0.5%

#### Figure 14. Jefferson County and Sub-Areas—Persons per Household (PPH) and Occupancy Rate

Sources: U.S. Census Bureau, 2000 and 2010 Censuses. Calculated by Population Research Center (PRC)

Note: For simplicity each UGB is referred to by its primary city's name.

# **Assumptions for Future Population Change**

Evaluating past demographic trends provides clues about what the future will look like and helps determine assumptions of likely scenarios for population change. Assumptions about fertility, mortality, and migration were developed for Jefferson County's overall population forecast. Jefferson County did not contain any large sub-areas<sup>4</sup>; population change for smaller sub-areas is determined by the change in the number of total housing units, PPH, occupancy rates, and group quarters population. Assumptions around these components of growth are derived from observations of historic building patterns, current plans for future housing development, and household demographics. Our forecast period is 2018-2068.

# **Assumptions for the County**

During the forecast period the population in Jefferson County is expected to age more quickly during the first half of the forecast period and then remain relatively stable over the forecast horizon. Fertility rates are expected to slightly decline throughout the forecast period (2.43 in 2015 to 2.37 in 2043).

Changes in survival rates are more stable than fertility and migration; overall life expectancy is expected to increase slightly over the forecast period. In spite of this trend, Jefferson County's aging population will increase the overall number of deaths throughout the forecast period.

Migration is the most volatile and challenging demographic component to forecast due to the many factors influencing migration patterns. Economic, social, and environmental factors such as employment, educational opportunities, housing availability, family ties, cultural affinity, climate change, and natural amenities occurring both inside and outside the study area can affect both the direction and the volume of migration.

We assume rates will change in line with historical trends unique to Jefferson County. Net out-migration of young adults and net in-migration of middle-aged individuals and retirees will persist throughout the forecast period. Countywide average annual net in-migration is expected to increase from 56 net in-migrants in 2015 to 249 net in-migrants in 2043. Net in-migration is expected to curb the results of a growing natural decrease, accounting for the majority of Jefferson County's population growth throughout the forecast period.

<sup>&</sup>lt;sup>4</sup> County sub-areas with populations greater than 7,000 in the forecast launch year were forecast using the cohortcomponent method. County sub-areas with populations less than 7,000 in forecast launch year were forecast using the housing-unit method. See Glossary of Key Terms at the end of this report for a brief description of these methods or refer to the *Methods* document for a more detailed description of these forecasting techniques.

### **Assumptions for Smaller Sub-Areas**

Rates of population growth for the smaller UGBs are determined by corresponding growth in the number of housing units as well as changes in housing occupancy rates and PPH. The change in housing unit growth is much more variable than change in housing occupancy rates or PPH.

Occupancy rates and PPH are assumed to stay relatively stable over the forecast period, with the exception of Metolius (see Appendix B). Smaller household size is associated with an aging population in Jefferson County and its sub-areas.

If planned housing units were reported in the surveys, we accounted for them being constructed over the next 5-15 years (or as specified by local officials). Finally, for sub-areas where population growth has been flat or declining, and there is no planned housing construction, we temper population change.

# **Forecast Trends**

Under the most-likely population growth scenario for Jefferson County, countywide and sub-area populations are expected to increase over the forecast period. The countywide population growth rate is forecast to peak in 2020 and then slowly decline throughout the forecast period. A reduction in population growth rates is driven by both (1) an aging population—contributing to steady increase in deaths—as well as (2) net in-migration tapering in the long run to account for uncertainty.

Jefferson County's total population is forecast to grow by 8,744 persons (37 percent) from 2018 to 2068, which translates into a total countywide population of 32,191 in 2068 (**Figure 15**). The population is forecast to grow at the highest rate—over 1 percent per year—during the near-term (2018-2025). This anticipated population growth in the near-term is based on two core assumptions: (1) strong net inmigration and housing construction will continue into 2020; (2) net in-migration of retirees will continue. Over 350 in-migrants are forecast in the near-term, leading to a continued population growth. This growth is bolstered by the nearly 150 more births than deaths forecast for the 2018 to 2025 period.



Figure 15. Jefferson County—Total Forecast Population by Five-year Intervals (2018-2068)

Jefferson County's three UGBs—Culver, Madras, and Metolius—are forecast to experience a combined population growth of more than 2,800 from 2018 to 2043 and over 2,500 from 2043 to 2068 (**Figure 16**). The majority of forecasted growth is expected in Madras, where population is forecasted to grow by over 4,000 during the forecast period; the share of the county population in this UGB is expected to increase from 31 percent in 2018 to 35 percent in 2068. Culver and Metolius are expected to grow slightly more during the first half of the forecast period relative to the second half, totaling 852 additional persons in Culver and 424 additional persons in Metolius from 2018 to 2068.

The outside UGB area is expected to account for roughly half of total countywide growth from 2018 to 2043 and roughly a third of growth from 2043 to 2068. However, its share is forecasted to decline over the 50-year period from 59% in 2018 to 53% by 2068.

				AAGR	AAGR	Share of	Share of	Share of
	2018	2043	2068	(2018-2043)	(2043-2068)	County 2018	County 2043	County 2068
Jefferson County	23,447	28,553	32,191	0.8%	0.5%			
Culver	1,440	1,898	2,292	1.1%	0.8%	6.1%	6.6%	7.1%
Madras	7,163	9,245	11,221	1.0%	0.8%	30.6%	32.4%	34.9%
Metolius	1,076	1,349	1,500	0.9%	0.4%	4.6%	4.7%	4.7%
Outside UGBs	13,767	16,060	17,178	0.6%	0.3%	58.7%	56.2%	53.4%

#### Figure 16. Jefferson County and Sub-Areas—Forecast Population and AAGR

Source: Forecast by Population Research Center (PRC)

Note: For simplicity each UGB is referred to by its primary city's name.

### **Forecast Trends in Components of Population Change**

As previously discussed, the number of in-migrants is forecast to outweigh the number of out-migrants in Jefferson County, creating positive net in-migration of new residents that is expected to persist throughout the forecast period. Furthermore, annual net in-migration is forecast to increase from the near-rate term of 159 individuals from 2010-2020 to 226 from 2020-2043 (**Figure 17**).

### Figure 17. Jefferson County—Average Annual Net In/Out-Migration (2000-2010, 2010-2020, and 2020-2043)



In addition to in-migration, a key factor shaping Jefferson County's forecast is the county's aging population. From 2018 to 2030 the proportion of the county population 65 years of age or older is forecast to grow from roughly 20 percent to 26 percent, and is forecast to reach more than 28 percent by 2043 (**Figure 18**). For a more detailed look at the age structure of Jefferson County's population see the final forecast table published to the forecast program website (<u>www.pdx.edu/prc/cycle-2-region-1-documents</u>).





In summary, population growth is expected to peak in 2020 and then slightly taper through the remainder of the forecast period (**Figure 19**). A waning natural increase is expected to transition to a natural decrease and cut into net in-migration over time, leading to moderate growth.



### Figure 19. Jefferson County—Components of Population Change (2015-2045)

# **Glossary of Key Terms**

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

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

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

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

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

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

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

# **Appendix A: Surveys and Supporting Information**

Supporting information is based on planning documents and reports, and from submissions to PRC from city officials and staff, and other stakeholders. The information pertains to characteristics of each city area, and to changes thought to occur in the future. Madras indicated there were no updates from the 2015 survey.

General Survey for Or	egon Population Forecast Program
Jurisdiction: City of Culver	Date: Sept 26, 2017
Observations about Population Composition (e.g. children, the elderly, racial and ethnic groups)	It seems retired folks are moving to the city but there isn't much change in the other areas of the population.
Observations about Housing	There is a small increase in new home starts.
Planned Housing Dev./Est. Year Completion (for detailed information submissions please use the Housing Development Survey)	No development plans <u>have been submitted</u> .
Planned future construction of Group Quarters facilities	None planned.
Future Employers Locating to the Area	There is one small company planning to come to the city but no major changes are projected.
Capacity and condition of infrastructure to accommodate growth.	Great capacity, little to no interest from businesses.
Any Promotions (promos) and Hindrances (hinders) to Population Growth; Other notes	Participate in the Jefferson County Econ. Development, but promotion is limited. Nothing hindering that I am aware <u>of</u> .
Do you have a buildable lands inventory for your area/UGB? If yes, it would be helpful if you could please share it with our center in GIS format.	Not a current one. Have lots of buildable land and no plans to expand UGB at this time.
Highlights or summary from planning documents and studies on influences and anticipation of population and housing growth (including any plans for UGB expansion and the stage in the expansion process)	I don't expect much change, slow residential growth and even slower commercial and industrial growth.



# Population Research Center

Jurisdiction: City of Me	tolivs, Oreson Date: 1/s/2018
Observations about Population Composition (e.g. children, the elderly, racial and ethnic groups)	7 % increase in Students since 2013
Observations about Housing	Subdivision of 41 lots is starting to build SFI Cumently 7 permits issued plus 4 other SF
Planned Housing Dev./Est. Year Completion	unknown.
Future Group Quarters Facilities	none
Future Employers	one new business
Infrastructure	repairing of 3 streets
Promotions (promos) and Hindrances (hinders) to Population Growth; Other notes	none
Highlights or summary from planning documents and studies on influences and anticipation of population and housing growth.	Unknown.
and hunch	City of Metalius City recor Organization Title

# **Appendix B: Specific Assumptions**

### Culver

We assume the 5-year average annual housing unit growth rate to taper throughout the forecast period. We assume the occupancy rate and persons per household (PPH) to be steady at 90.5% percent and 3.1 for the 25-year horizon, respectively. We assume the group quarters population to remain at 6.

### Madras

We assume the 5-year average annual housing unit growth rate to taper throughout the forecast period. We assume the occupancy rate to increase to 90.9% and persons per household (PPH) to decline to 2.59 for the 25-year horizon. We assume the group quarters population to remain at 137.

### Metolius

We assume the 5-year average annual housing unit growth rate to taper throughout the forecast period. We assume the occupancy rate to be steady at 92.8% and persons per household (PPH) to increase to 3.23 for the 25-year horizon, respectively. There is no group quarters population in this sub-area.

### **Outside UGBs**

We assume the 5-year average annual housing unit growth rate to remain stable throughout the forecast period. We assume the occupancy rate and persons per household (PPH) to be steady at 74.6% percent and 2.64 for the 25-year horizon, respectively. We assume the group quarters population to remain at 710.

# **Appendix C: Detailed Population Forecast Results**

Population							
Forecasts by Age							
Group / Year	2018	2020	2025	2030	2035	2040	2043
00-04	1,444	1,397	1,377	1,362	1,359	1,378	1,391
05-09	1,446	1,556	1,409	1,401	1,394	1,392	1,405
10-14	1,453	1,411	1,669	1,523	1,522	1,516	1,516
15-19	1,410	1,406	1,281	1,529	1,404	1,405	1,403
20-24	1,152	1,150	1,119	1,029	1,240	1,138	1,139
25-29	1,307	1,318	1,294	1,268	1,173	1,415	1,344
30-34	1,347	1,392	1,398	1,382	1,362	1,260	1,412
35-39	1,347	1,379	1,497	1,517	1,506	1,487	1,418
40-44	1,411	1,449	1,500	1,642	1,673	1,662	1,650
45-49	1,516	1,519	1,583	1,653	1,818	1,855	1,848
50-54	1,570	1,605	1,586	1,666	1,748	1,924	1,949
55-59	1,693	1,718	1,771	1,748	1,831	1,923	2,038
60-64	1,744	1,821	1,845	1,899	1,867	1,955	2,014
65-69	1,599	1,718	1,851	1,891	1,958	1,927	1,982
70-74	1,283	1,402	1,603	1,748	1,797	1,864	1,849
75-79	821	907	1,240	1,437	1,576	1,622	1,658
80-84	538	594	750	1,045	1,223	1,339	1,363
85+	366	399	498	636	872	1,082	1,175
Total	23,447	24,139	25,273	26,375	27,323	28,145	28,553

Figure 20. Jefferson County—Population by Five-Year Age Group

### Figure 21. Jefferson County's Sub-Areas—Total Population

Area / Year	2018	2020	2025	2030	2035	2040	2045	2050	2055	2060	2065	2068
Jefferson County	23,447	24,139	25,273	26,375	27,323	28,145	28,828	29,528	30,245	30,979	31,731	32,191
Culver UGB	1,440	1,511	1,572	1,678	1,768	1,850	1,931	2,008	2,094	2,171	2,243	2,292
Madras UGB	7,163	7,302	7,683	8,249	8,689	9,035	9,388	9,777	10,222	10,610	10,975	11,221
Metolius UGB	1,076	1,158	1,200	1,249	1,289	1,328	1,364	1,392	1,419	1,449	1,481	1,500
Outside UGB Area	13,767	14,168	14,818	15,199	15,577	15,932	16,145	16,352	16,509	16,748	17,031	17,178

# OSCIM Program Frequently Asked Questions



# OREGON SCHOOL CAPITAL IMPROVEMENT MATCHING (OSCIM) PROGRAM FREQUENTLY ASKED QUESTIONS (FAQS)

# **Table of Contents**

Overview	2
Priority List and Funding Formula	4
First in Time (FIT) Program	5
Application	5
Contingencies	7

# **Overview**

- 1. What is the source of funding for the OSCIM Program? How much funding is available?
  - a. The program is funded by state-issues GO bonds. The legislature approves the amount of bonding authority for the program each biennium.
- 2. What is a General Obligation (GO) bond?
  - a. Municipal Securities Rulemaking Board's Explanation of a General Obligation Bond: "Typically refers to a bond issued by a state or local government that is payable from general funds of the issuer, although the precise source and priority of payment for general obligation bonds may vary considerably from issuer to issuer depending on applicable state or local law. Most general obligation bonds are said to entail the full faith and credit (and in many cases the taxing power) of the issuer, depending on applicable state or local law. General obligation bonds issued by local units of government often are payable from (and in some cases solely from) the issuer's ad valorem taxes, while general obligation bonds issued by states often are payable from appropriations made by the state legislature."
- 3. Are charter schools eligible to receive the match?
  - a. No. Charter schools do not have the authority to issue GO bonds so they are not eligible to participate in the OSCIM Program.
- 4. What funds can a district use to match the state funds?
  - a. A district can only use GO bond funds to match the OSCIM Program.
  - b. The OSCIM Program will match the lesser of total proceeds from the sale of the local GO bond, exclusive of underwriter's discount, and other costs of issuance, or the original amount requested by the district in its application.
    - i. Example A: A district receives an initial commitment for \$2 million and the district sells the bonds at a premium for \$2.2 million. The OSCIM Program will only match the \$2 million initial commitment.
    - ii. Example B: A district receives an initial commitment of \$2 million. District sells bonds for \$1.9 million, but has a premium of \$200,000 for a total sale of \$2.1 million, after costs of issuance. The OSCIM program will match up to the \$2 million initial commitment.
- 5. Can a district use a bond that is strictly intended to refinance current general obligation debt as a basis for an OSCIM Program application?
  - a. No.

- 6. Can districts use OSCIM Program funds to match a bond that also includes the reimbursement of previously incurred capital costs?
  - a. Possibly. For example, a district purchased land a year ago in anticipation of building a new school, and used short term financing to purchase the land. Subject to Department approval, the OSCIM Program will match a bond that includes the reimbursement of the land purchase as a use of the bond proceeds. The Department approval is to ensure that the Department is complying with its constitutional and statutory requirements. However, if a bond is a combination of new capital construction and refinancing old debt, then only the new capital construction can be matched by the OSCIM Program.
- 7. If a district receives voter approval for an amount of bonds that they anticipate selling in series over a few years, can that district apply more than once for matching funds?
  - a. No. Districts may only apply for matching funds one time per bond election.
- 8. Can a district use a successful election as a basis for future OSCIM Program funds?
  - a. No. The goal of the program is to provide incentives to local voters to invest in their school facilities. To create equity across time, the OSCIM Program needs to ensure that funds are available for each election in a biennium. If a district were permitted to use a successful election earlier in the biennium as a basis for future applications, then that would disadvantage the districts that waited to apply for the OSCIM Program later in the biennium.
- 9. What are the matching limits should a district receive a commitment?
  - a. The OSCIM Program will match a school district's local GO bond one-to-one up to \$4 million of local GO bond, or the amount approved in the local bond sale, whichever is less. After that, the OSCIM Program will match district's local GO bonds between \$4 million and \$8 million depending on the Funding Formula. The Funding Formula and Priority List are available on the <u>OSCIM Program webpage</u>.
- 10. How will the funding be distributed?
  - a. As described in Senate Bill 447, the funding will be split into two different funding pools. The first pool will contain 60% of the net bond proceeds and will be awarded to districts that pass a local GO bond based on the Priority List established by the Office of School Facilities. The second pool will contain 40% of the net proceeds and will be awarded to districts that pass a local GO bond based on a First in Time (FIT) program.
- 11. Can a district apply for both the Priority List funding and First in Time funding?
  - a. Yes. Districts will provide one application in which the criteria for both the Priority List and First in Time funding will be applied. A district may be awarded funds from one source of funding, the other, or a combination of the two.

- 12. Will districts be partially funded if there are not enough funds to meet the demand?
  - a. Yes. The goal of the initial commitment is to provide a full match. However, if there are not enough funds to provide a full match, then the last district in line will receive a partial commitment.
  - b. If there are funds available because a district did not have a successful election, then the funds will be distributed as follows:
    - i. Districts with a partial commitment and a successful election will be made whole;
    - ii. Districts will be provided funds if they had a successful election in the order they appear on the waitlist.
- 13. How often can districts apply?
  - a. A district that receives a commitment, passes a bond, and meets all other program requirements may not apply for another commitment for the next six years.

# **Priority List and Funding Formula**

- 1. What is the Priority List?
  - a. The Priority List ranks each district in terms of funding priority based on the district's total assessed value, number of students in poverty, and extended weighted Average Daily Membership (ADMw), as prescribed in Senate Bill 447. It also shows the amount of funds that could be awarded to each district, as determined by the Funding Formula.
- 2. What is the purpose of the Priority List?
  - a. The purpose is to give school districts that have low total assessed value and high poverty a better chance of receiving a matching grant when they go for a local GO bond.
- 3. How are the Priority List and Funding Formula calculated?
  - a. The Priority List and Funding Formula Explanation can be found on the OSCIM Program webpage.
- 4. How will I know where my school district is on the Priority List?
  - a. The Priority List can be found on the OSCIM Program webpage.
- 5. When and how often will the Priority List be updated?
  - a. The Priority List will be updated once a biennium to ensure that all districts are using the same list for each bond election. The list will be updated once all outside variables, including total assessed value and poverty information, have been updated from their respective sources. The updates will be done using the same year's information for all sources of information. The update will occur by June 1 for the next biennium.

- 6. What sources of data are used in the Funding Formula?
  - a. The U.S. Census Bureau provides the poverty numbers and the Oregon Department of Revenue provides the total assessed values. All ADMw information is provided by the Oregon Department of Education.
- 7. Can I appeal my district's placement on the Priority List?
  - a. No, all determinations using the Priority List and Funding Formula are final and based on state law.
- 8. Is there a chance that a district will qualify for the program, but not receive an award?
  - a. Yes. It is fully anticipated that there will not be enough OSCIM Program funds to match all districts that apply in a given funding cycle. When that happens, the districts that applied but did not get a match will be placed on a waiting list.

# First in Time (FIT) Program

- 1. How will the Office of School Facilities (OSF) define First in Time?
  - a. The OSF will define First in Time using a lottery process. The OSF will designate specific periods of time such that all applications received within a given period of time will be considered to have been submitted at the same time. This will increase equity.
  - b. Applications submitted between 8:00 AM and 12:30 PM will be considered submitted first.
  - c. Applications submitted between 12:31 PM and 5:00 PM will be considered submitted second.
- 2. How will the Office of School Facilities (OSF) make commitments to districts under the First in Time Program?
  - a. The OSF will consider all completed applications received within a given time period as received at the same time. If there is enough funding to cover all of the applications, then all districts will receive a commitment. If there is not enough funding to cover all the applications in a given time period, then the OSF will determine which districts will receive commitments based on a lottery.

# Application

- 1. Where can I find the application for the OSCIM Program?
  - a. The application can be found on the OSCIM Program webpage.
- 2. Do I use the same application for the First in Time and Priority List portions of the funds?
  - a. Yes.

- 3. When are the applications due?
  - a. The due dates for the applications are as follows:

Application Requirement	November Elections	May Elections
Facilities Assessment and Long-Range Plan	July 1	December 1
OSCIM Program Application	July 15	December 15

- 4. What time on the due date are the applications due?
  - a. Applications must be submitted **no earlier** than 8:00 AM and **no later** than 5:00 PM on the due date.
- 5. What if one of these dates falls on a weekend or holiday?
  - a. If one of these dates falls on a weekend or holiday, the applications will be due on the preceding Friday.
- 6. Are districts required to submit a Facilities Assessment and Long-Range Facility Plan as part of the OSCIM Program?
  - a. Yes. Senate Bill 447 requires that districts submit these documents as part of the program.
- 7. What must these documents contain?
  - a. The Facilities Assessment must meet all requirements listed in <u>OAR 581-027-0023(8)</u>, which includes the requirements in <u>OAR 581-027-0035</u>.
  - b. The Long-Range Facility Plan must meet all requirements listed in <u>OAR 581-027-0023(7)</u>, which includes the requirements in <u>OAR 581-027-0040</u>.
- 8. Why are the Facilities Assessment and Long-Range Facility Plan due before the OSCIM Program application?
  - a. The due date provides the Office of School Facilities time to ensure that the documents meet all requirements and also gives the school districts some time to correct any deficiencies in their submission.
- 9. If a district does not submit a Facilities Assessment and Long-Range Facility Plan can they still apply for an OSCIM Program grant?
  - a. No. These documents are required for the OSCIM Program and an application that does not have these documents will not be considered.
- 10. May a school district receive assistance in filling out its application?
  - Yes. The Office of School Facilities will answer questions about the application up until the application due date. For OSCIM Program application assistance, please contact <u>Michael Elliott</u> via email or at 503-947-5627.

- 11. How can districts submit their applications?
  - a. Districts must submit their applications via e-mail to the Office of School Facilities.
- 12. What happens at the application due date?
  - a. At the application due date, the Office of School Facilities will no longer provide assistance to school districts for the application process. Applications will be recorded when they are received by the time stamp on the e-mail.
- 13. What will the school districts have to do in order to receive the match?
  - a. In addition to passing a local GO bond, the school district must also comply with all of the provisions of the Grant Agreement and any applicable rules and statutes.
- 14. Where can I get assistance in marketing and drafting my GO bond measure text?
  - a. A bond counsel firm will be able to assist with the drafting of the ballot title. Campaign and communications consultants can assist with marketing needs. Additionally, the Oregon School Boards Association (OSBA) retains a listing of districts that have been successful in the past and are also a good resource.

# Contingencies

- 1. What happens when a school district that was awarded an OSCIM Program matching grant fails to pass a bond?
  - a. Districts will not receive actual funds until voters approve a local GO bond measure and the district signs a grant agreement. Thus, if the OSCIM Program commits to a district and the district does not pass its local GO bond, then those funds will not be distributed to that district. Instead, the funds will be awarded to the next district on the waitlist that passed a bond.
- 2. Why will the funds be awarded to the next district in line instead of rolled forward to the next funding cycle?
  - a. There are three reasons for this:
    - i. First is that if funds keep being rolled forward to the next election, then at the end of the biennium, it is possible that the OSCIM Program will have leftover funds because not enough districts passed a bond. It would be difficult to sort back through the elections to determine which districts that passed a bond should receive the matching grant.
    - ii. Second is that while the primary goal is to encourage districts to pass bonds, the secondary goal is to provide state funding to help address the significant deferred maintenance backlog in Oregon schools. By providing the funds to the next district in line that passed a bond, the OSCIM Program is achieving that objective.

- iii. Finally, districts will know where they stand on the waiting list prior to the bond measure text deadline, and those that rank high may be able to use that information to assist voters in making an informed decision.
- 3. If a district does not receive a commitment in one grant period, does the district have any additional priority in the second grant period?
  - a. No. Each grant period is a self-contained list. Thus, a district that did not receive funds in one grant period would have to reapply in the next grant period and be considered with all other applications in the next grant period.
- 4. How will a district know when is the best time to go for a GO bond?
  - a. That is a decision left to the district's school board. The OSCIM Program will provide as much information as possible in terms of the application ahead of the bond measure text deadline.

# Oregon SHPO Clearance Form

# **OREGON SHPO CLEARANCE FORM**

Do not use this form for ODOT or Federal Highway projects or to record archaeological sites

This form is for: federal cultural resource reviews (Section 106); state cultural resource reviews (ORS 358.653)				
SECTION 1: PROPERTY INFORMATION	SHPO Case Number:			
Property Name: Black Butte School				
Street Address: 25745 SW Forest Service Road 1419				
City: Camp Sherman, OR 97730 County: Jeffe	rson			
Agency Project # Project Name	a: ODE Building ID #20520100			
If there is not a street address, include the Township, Range, and Sect	on, cross streets, or other address description			
Owner:        Private        Local Gov	ie Gov 🗌 Federal Gov 🛛 Other: Public			
Are there one or more buildings or structures? $\square$ YES $\square$	] NO – If no, skip to Section 2 and append photo(s)			
Is the property listed in the National Register of Historic Places?	ndividually 🔲 YES – In a district 🖾 NO			
Original Construction date: 1951  Check box if date is estimated by the set of the set o	ted			
Siding Type(s) and Material(s): Wood	Window Type(s) and Material(s): Wood & Aluminum			
Has the property been physically altered?	rations 🛛 Few Alterations 🗌 Major / Many Alterations			
SECTION 2: APPLICANT DETERMINATION OF ELIGIBILITY	- Check the appropriate box			
The purpose of this review is to avoid impacts to properties that are "eligible" (historic) or already listed in the National Register of Historic Places. Fully establishing historic significance can be very costly and time consuming. Therefore initial evaluations are based on age (50 years or greater) and integrity (historic appearance), which are the minimum qualifications for listing in the National Register. Additional documentation may be needed further in the process. but typically initial evaluations allow the review process to proceed expeditiously.				
<ul> <li>The property is considered Eligible at this time because it is</li> <li>is at least 50 years old <i>and</i> retains its historic integrity (m</li> <li>has potential significance (architectural or historical)</li> </ul>	already listed in the National Register <b>or</b> inimal alterations to key features)			
<ul> <li>The property is considered Not Eligible at this time because</li> <li>is less than 50 years old or is 50 years or older but there</li> <li>is known to have no significance, based on National Regi</li> </ul>	it: have been major alterations to key features ster-level documentation and evaluation			
SECTION 3: APPLICANT DETERMINATION OF EFFECT - Che	eck the appropriate box			
The project has <b>NO EFFECT</b> on historic properties, either because there is no eligible property involved or because the property will not be impacted physically or visually.				
The project will have a minor impact on a property that is eligible or already listed in the National Register, and therefore there is <b>NO ADVERSE EFFECT</b> . Minor impacts include replacement of some, but not all siding doors or windows etc.				
The project will have a major impact on a property that is eligible or already listed in the National Register, therefore there is an <b>ADVERSE EFFECT</b> Major impacts include full or partial demolition, complete residing, full window replacement, etc.				
STATE HISTORIC PRESERVATION OFFICE COMMENTS – Official use only				
Eligibility: Concur with the eligibility determination abov	re. In above.			
Effect: Concur with the effect determination above.	above.			
Signed: Date:				
CONTACT INFORMATION STAMP Comments:				

# **OREGON SHPO CLEARANCE FORM**

Do not use this form for ODOT or Federal Highway projects or to record archaeological sites

SECTION 4: PREVIOUS ALTERATIONS TO THE BUILDING OR STRUCTURE					
Only complete this section for buildings that are 50 years old or older. Describe any alterations that have already occurred to the building, such as material replacement, including siding, windows, and doors; any additions, including garages; and any removal or addition of architectural details, such as brackets, columns, and trim. Provide estimated dates for the work. Attach additional pages as necessary.					
This building looks historically intact from the street front as the original two-room schoolhouse. In 1963 a covered play area was added on the rear of the building off the eastern classroom. Later that decade, the structure was enclosed, but not as a conditioned space. During 2017, the structure was weatherproofed to be used year-round as a multipurpose room. An attached greenhouse was added on the back of the western classroom sometime in the last 20 years.					
SECTION 5: PROJECT DESCRIPTION	DN				
Describe what work is proposed, including what materials will be used and how they will be installed. Specifically identify what historic materials will be retained, restored, replaced, or covered. Include drawings, photos, cut sheets (product descriptions), additional sheets, and other materials as necessary. For vacant lots, please describe the intended use.					
Project is a facility assessment and lo	ng-range facility plan. There is no work on the actual building(s) proposed at this time.				
SECTION 6: FUNDING SOURCE					
ARRA FCC FERC HUD ODOE USDARD USFS					
SECTION 7: AGENCY CONTACT INFORMATION					
Name of Organization Submitting the	Project: BLRB Architects				
Project Contact Name and Title: Heidi Slaybaugh, Architect, Senior Associate					
Street Address, City, Zip: 721 SW Industrial Way, Suite 130, Bend, OR 97702					
Phone: 541-330-6506 Email: hslaybaugh@blrb.com					
Date of Submission: 11/02/2021					
SECTION 8: ATTACHMENTS					
REQUIRED	⊠ 3 – 4, color, 4 x 5 photographs of the subject property, digital or print. One photo is sufficient for vacant property				
	$oxedsymbol{\boxtimes}$ Project area map, for projects including more than one tax lot				
AS NEEDED	igtimes Additional drawings, reports, or other relevant materials				
Contact SHPO staff with questions	Continuation sheet for sections 4 or 5, or additional context to determine National Register Eligibility.				
SHPO Mailing Address: Review and Compliance, Oregon SHPO, 725 Summer St. NE, Suite C, Salem, OR 97301					
ORSHPO.Clearance@oregon.gov					

Do not use this form for ODOT, Federal Highway projects or to record archaeological sites

### **CONTINUATION SHEET**

- Include additional documentation for Section 4 or 5 as necessary. Attach maps, drawings, and reports as needed to illustrate current conditions and the planned project. If submitting this form by email, photos and maps may be inserted into continuation sheets.
- If completing a complete Determination of Eligibility (DOE) or Finding of Effect (FOE), use continuation sheets as necessary or include appendixes.



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North (front) Elevation of School



North-West (front-side) Elevation of School

Do not use this form for ODOT, Federal Highway projects or to record archaeological sites



South-West (side) Elevation of School - Showing Greenhouse Addition on rear of Western Classroom and Multipurpose Room Addition on rear of Eastern Classroom



West (side) Elevation of Multipurpose Room Addition



South (rear) Elevation of Greenhouse Addition (on left) and Multipurpose Room Addition (on right)

Oregon State Historic Preservation Office Revised 2/18/2014

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East (side) Elevation of School (on right) and Multipurpose Room Addition (on left)

# ArcGIS Web Map



# OREGON SHPO CLEARANCE FORM INSTRUCTIONS

Do not use this form for ODOT, Federal Highway projects or to record archaeological sites

### **SECTION 1: PROPERTY INFORMATION:**

- o Include complete address and agency project number and name, if applicable.
- Check YES if there are any buildings on the site. Check NO if it is a vacant parcel (in which case it will be evaluated for archaeology and the potential impact on surrounding buildings only.)
- Check YES if your research (look on our website at <u>http://heritagedata.prd.state.or.us/historic/</u> and/or call your local planning office) shows the property is listed. Check NO if you find that it is not listed.
- $\circ~$  Fill in the construction date. Check box if date is estimated.
- o Describe the siding and window types and materials. Examples: double hung wood windows; vertical wood siding.
- Check to what degree the property has been altered. Ask yourself, would the original owner recognize the building, or have there been many changes that obscure the historic features?

### SECTION 2: APPLICANT DETERMINATION OF ELIGIBILITY:

- Check the ELIGIBLE box if the building is listed (National Register OR Local landmarks register), has previously been evaluated as eligible, or is 50 years of age AND the majority of the exterior historic features are retained.
- Check the NOT ELIGIBLE box if the building is not yet 50 years old, or if in your opinion there have been many and/or major changes (e.g. additions, siding and/or window replacement, porch enclosures).
- Applicants who acknowledge that the property meets the minimum qualifications for listing in the National Register but choose to contest this determination must complete a Determination of Eligibility (DOE). The DOE must demonstrate that the property is not eligible for the National Register using the Criteria listed in National Register Bulletin 15, "How to Apply the National Register Criteria for Evaluation." The DOE may be submitted on continuation sheets or as a separate document.

### SECTION 3: APPLICANT DETERMINATION OF EFFECT:

- Check the NO EFFECT box if the property is NOT ELIGIBLE for listing in the National Register or if the work will not replace or alter the appearance of any of the building's exterior features.
- Check the NO ADVERSE EFFECT box if the property is ELIGIBLE for listing or is already listed in the National Register and the work is visible (e.g. re-roofing with same materials, window or siding repair, adding a vent) but will not remove or obscure historic features.
- Check ADVERSE EFFECT if the property is ELIGIBLE or listed in the National Register and the work includes major changes, such as replacing the siding or windows.

### **SECTION 4: PREVIOUS ALTERATIONS**

List the changes that already occurred to the building, including siding, windows, doors, porches, additions
including dormers, or if the property was moved. Include the approximate date of each alteration. The information
can be provided in list format.

### **SECTION 5: PROJECT DESCRIPTION:**

 Clearly describe what is being repaired or replaced, and how that work will be done. What materials and installation process are proposed? Include sufficient information (e.g. close-up photos, product specification sheets) so we can compare what exists with what is proposed. The information can be provided in list format.

### SECTION 6: FUNDING SOURCE:

o Check the federal or state agency funding the project; or check "other" and fill in the agency name.

### SECTION 7: AGENCY CONTACT INFORMATION:

o List the name of the organization submitting the Clearance Form

### SECTION 8: ATTACHMENTS:

- Photos: Include photos of the entire building, especially the elevations that can be seen from the street. Include close-ups of features that will be impacted by the project.
- Additional Information: When applicable, include window specifications, plans or diagrams that illustrate pertinent existing conditions and/or proposed work
- Continuation sheets for additional Section 4 or 5 narrative or to append a formal Determination of Eligibility (DOE) or Finding of Effect (FOE). These materials may also be submitted as a separate document.