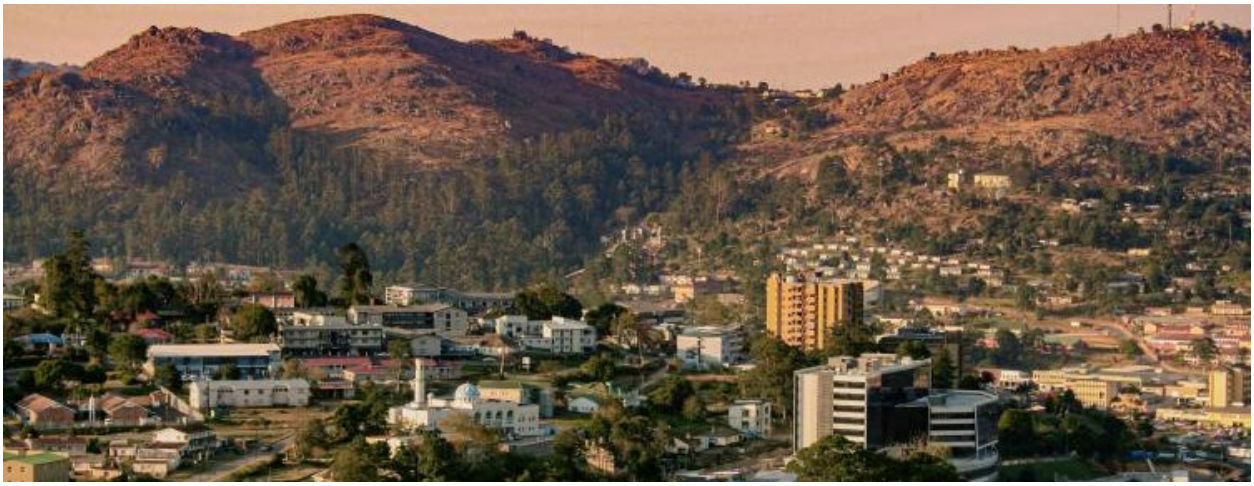


Post-Acknowledgment Plan Amendment Project Impact and Technical Assistance Report 2025

Fair Housing Council of Oregon and *Housing Land Advocates*

Post-Acknowledgment Plan Amendment Project

Impact and Technical Assistance Report 2025



What is the Post-Acknowledgement Plan Amendment Project?

Founded in 2018, the Post Acknowledgement Plan Amendment (PAPA) Project is a collaboration between the Fair Housing Council of Oregon (FHCO) and Housing Land Advocates (HLA). What started off as a knowledge gathering and watchdog effort around Statewide Planning Goal 10 (Housing) and Affirmatively Furthering Fair Housing (AFFH), has grown in scope to encompass mentoring, policy review, technical assistance, and persistent anti-segregationist work. This scope is in line with the missions of HLA and FHCO, two nonprofit organizations dedicated to ensuring an adequate and appropriate supply of affordable housing, and housing free from discrimination, for all Oregonians. For an in-depth review of both Oregon Statewide Planning Goal 10 and AFFH, please see the paper *Standing at the Intersection of Fair Housing and Oregon Goal 10 Housing*.

Here is a short history of the Project:

Early Years 2018-2020 – pioneering a model of cooperation

To ensure inclusive communities statewide, HLA and FHCO recruited volunteers and hired part time contractors to review all post acknowledgement plan amendments with fair housing/Statewide Planning Goal 10 implications that were submitted to the Department of Land Conservation and Development (DLCD). During review, jurisdictions received feedback on their Goal 10 findings with emphasis on utilization of their Housing Needs Analysis (HNA) and Buildable Lands Inventory (BLI). Feedback could come in the form of technical assistance, both negative and positive comment letters, and potential legal action depending on the circumstances of each case.

While required by law, during these early stages the PAPA project observed that Goal 10 findings were often absent from planning staff reports or only present in a cursory manner. Jurisdictions made housing decisions without considering their mandated commitment to provide an adequate number of needed housing units (at both the needed housing type and affordability level) or their buildable lands inventory.

Advocates also faced many barriers obtaining the information behind, or understanding the bases for, these amendments.

The PAPA project approached these shortcomings with an attitude of cooperation. Outreach was conducted early and often, to educate planners before they had invested significant time in their staff report findings. Additionally, the request for planning staff reports from a watchdog group was a novel concept for many planning departments. The PAPA project motivated planning departments to post materials online, and create the infrastructure for any concerned citizen to download and read staff reports straight from a website in advance of planning commission meetings.

As a result of these efforts, the PAPA project achieved two large wins

1) Within 2 years, more than 90% of reviewed staff reports contained Goal 10 findings, whereas previously, only about 15% contained Goal 10 findings.
2) Within 2 years, 95% of jurisdictions were posting their staff reports and planning commission reports online in advance of planning commission meetings.

Hitting Our Stride 2021-2023 – Housing for All

Once jurisdictions were providing the rationale behind their decisions through Goal 10 findings, and available to the public, the PAPA project was able to educate planners and planning commissioners. Local government staff and planning officials knew they were being watched for plan and zoning changes and accurate reporting of their housing needs. The PAPA project expanded into reviewing development code changes and documenting systemic ways jurisdictions were regulating multifamily and affordable housing to places with less resources and more environmental hazards. The PAPA project pointed out language that was not clear and objective (as required by statute), took the lead in reviewing mandated changes from state housing legislation, and reported findings quarterly to DLCD. With no full time staff, the PAPA project reviewed between 200-300 amendments every year, comprising over 1000 pages of text. Continually, the PAPA project was the only entity commenting on changes, and showcased again and again that, without oversight, statewide rules and regulations could easily be ignored.

Due to the PAPA projects work, it became standard for local jurisdictions to

- Consider housing needs and affordability when changing parking minimums
- Consider housing needs and affordability when changing development code (for example, are the local design regulations prohibitive towards smaller and more affordable apartments?)
- Consider housing needs and tenancy needs when creating maximum sizes for ADUs
- Quantify the impact of changes through consideration of maximum and minimum numbers of units that could be built due to the proposed changes

Present Day 2024-2026 – Statewide Housing Advocacy Leadership and Anti-Segregation

In 2024, the PAPA project presented *Segregation Alive and Well* at the Housing Oregon Conference (Housing Oregon). Combining now years of experience, PAPA project volunteers, part time staff, and members of HLA and FHCO detailed how jurisdictions were driving their minority and disabled populations into the outskirts of cities, far away from opportunities and resources. The finale to that presentation was the example of an adopted ordinance in Happy Valley, prohibiting cottage clusters in only its older, wealthier neighborhoods. HLA and FHCO announced during *Segregation Alive and Well*

the appeal of that ordinance to the Land Use Board of Appeals. That litigation led the 2025 Oregon Legislature to prohibit these practices.

As of today, the PAPA project has grown far past its original scope of work. While it still reviews over 1000 pages of staff reports annually, it now also runs a robust mentorship program with Portland State University graduate students in the Masters in Urban and Regional Planning program and sends out technical advice and comments on planning and zoning change proposals to an email listserv of over 800 active subscribers. HLA is the only watchdog organization consistently reviewing Housing Production Strategies (HPSs) and is a key advocate for system development charge waivers, construction excise taxes, and upzoning. HLA built upon the momentum of *Segregation Alive and Well* with a follow up presentation at Housing Oregon in 2025 (*Segregation Alive and Well in Oregon Update)*, and a comprehensive HPS review document pointing out that no jurisdiction reviewed had dedicated itself to upzoning a piece of single family zoned land to increase density or otherwise promote affordable housing.

The PAPA project is currently creating a Fair Housing framework for Housing Production Strategies, and a comprehensive document reviewing the lack of Affirmatively Furthering Fair Housing within the reviewed HPSs. Affirmatively Furthering Fair \Hhousing (AFFH) means addressing patterns of segregation, racially or ethnically concentrated areas of poverty, and disparities in housing needs, choice, and opportunity. The process that mandated HPSs also set forth the requirement that AFFH be incorporated into these documents, and therefore also the respective jurisdiction's plan for housing production. The PAPA project remains a tireless advocate for anti-segregationist policies and is committed to ensuring an adequate and appropriate supply of affordable housing, and housing free from discrimination, for all Oregonians.

Current Technical Assistance Notes for 2025

In 2025, the PAPA project reviewed a total of 242 PAPAs, and over 1000 pages of planning documentation. As can be seen from the below charts, the PAPA project reviews proposed changes from all across Oregon, with the bulk of its work in quantity and detail with smaller jurisdictions. The chart below, PAPAs Reviewed vs Size of City showcases that the bulk of the cities the PAPA project works with are below 10,000 persons in population. The chart Cities Assisted by Size showcases the PAPA project's reach across all of Oregon, with larger bubbles indicating more PAPAs reviewed for a particular jurisdiction. Additionally, smaller cities in comparison to medium and large cities, have more than 6 average communications per review. This means that the PAPA project is engaging in prolonged and active discussion regarding the proposed changes. Smaller jurisdictions often do not have dedicated planning staff, and the PAPA project does extensive education with the planners in these jurisdictions around Affirmatively Furthering Fair Housing (AFFH), Goal 10, and different planning tools and techniques to create more affordable and bountiful housing options. Two examples of this feedback are included in the appendix to this report.

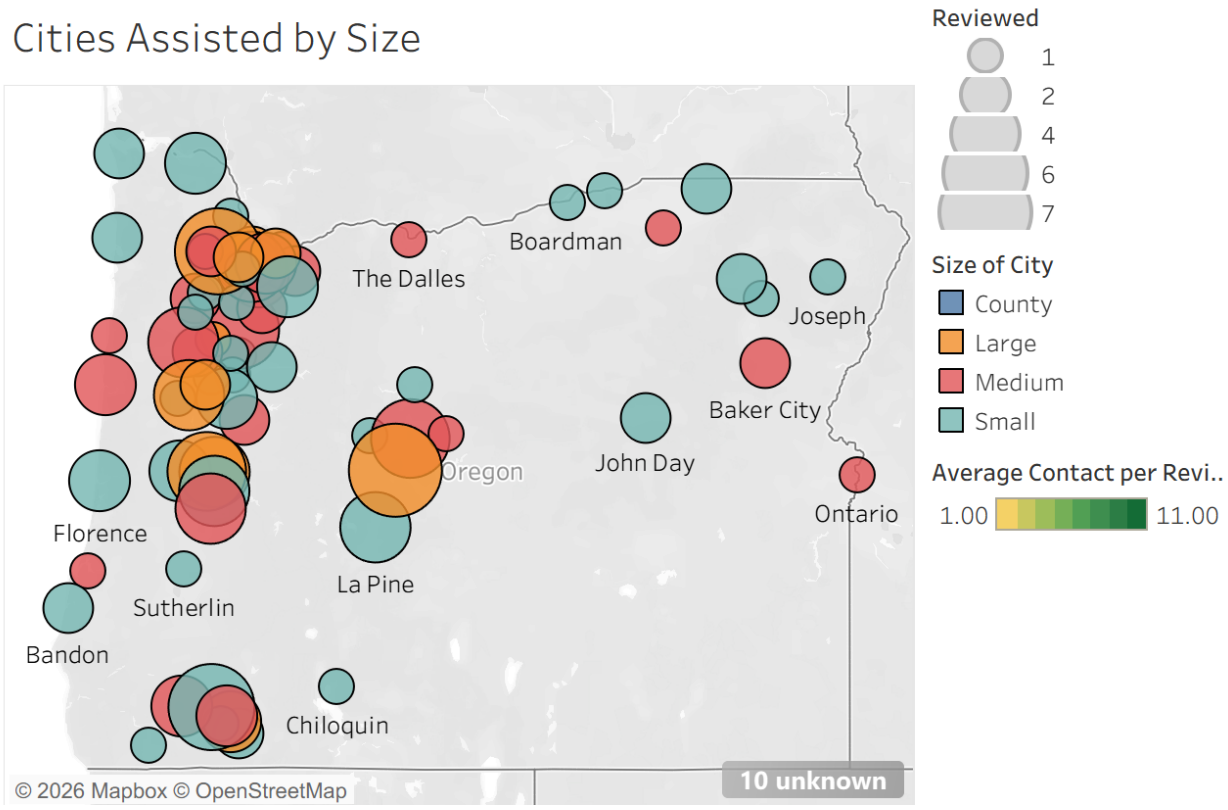
Larger cities are not exempt from making mistakes as well, nor exempt from needing technical assistance. As an attached example, the PAPA project pointed out and motivated an amendment out of compliance with HB 2138. Passed in Oregon's 2025 session, HB 2138 encourages "middle housing" production (duplexes, triplexes, quadplexes, townhomes, and cottage clusters) in urban and unincorporated areas through lot splits and reducing regulatory red tape.

More formal feedback issued by the PAPA project is often in the form of comment letters. The PAPA project submitted 17 comment letters in 2025, 8 positive (Scio, Baker City, Central Point, Cornelius,

Madras, Ontario, Sweet Home, Milwaukie) and 9 negative (Cave Junction, Medford, Hillsboro x2, Grants Pass, Lake Oswego, Sherwood, Eugene x2, King City, Aumsville). The cities of Hillsboro and Eugene are frequently the subject of negative letters.

Furthermore, the PAPA project created a resource website for public and private planners, with positive examples of Goal 10 findings, templates (see below) for basic Goal 10 findings for plan amendments/zone changes/development code changes and, further, Goal 10 findings for annexations. These templates can also be used by developers of needed housing to advocate for zoning or other amendments necessary to create needed housing.

* In the following diagrams, please note that large cities are grouped to have populations over 50,000, medium cities to have populations between 10,000 and 50,000, and small cities to have populations of below 10,000. On both charts, not all data points (jurisdictions) are labeled due to the fact that the readability of the chart would be compromised.





Annexations Template

1) What are the current needs of the city in terms of the Housing Needs Analysis (HNA) and Buildable Lands Inventory (BLI)? This is often best illustrated in a graph or chart. This should be a standard response in annexations and any comp/zone plan change. Once you create this response, the basics of it can be copy and pasted into each report and elaborated on as necessary.

2) Is the annexation in compliance with the comprehensive plan and/or does it require a zoning map change?

3) If the annexation conforms to the comprehensive plan, why is that so? Additionally, does the zoning and the initial designation as dictated by the comprehensive plan have any discretion in choices (Example, comprehensive planning designation is not fully specified such as a residential zone as opposed explicitly stating zoned R-2)? If there is discretion, what zoning should the jurisdiction choose based on the needs of the HNA/BLI? For example, if the rezoning is proposed to a low density and could, under the plan, be classified to a higher density to meet housing needs, why is that path not taken? If there is little discretion for the jurisdiction, does the proscribed zoning support the housing needs as dictated by part 1, in light of recent developments?

4) If the annexation is not in compliance with the comprehensive plan, is it furthering the needs of the city in terms of the HNA and BLI? (types of housing, affordability, etc.) and what other changes to the plan or zoning regulations should be made to accommodate those needs?

Basic Goal 10 Findings Template

1) What are your needs in terms of the HNA and BLI?

    a. This is a basic response that can be copy and pasted from amendment to amendment. It is most helpful in table format, such as the example in the appendix from Medford. You can do this in terms of land for the BLI.

2) How does the proposed amendment add, detract, or is a net neutral to the housing supply?

    a. Quantification here can be done in terms of land, percentages, or number of units. For Example:

        i. Upzoning parcel A from single family to multifamily will increase the number of potential units in the City from 1 single family home to a max 25 unit multi dwelling complex.

        ii. Reducing parking minimums on ADUs from 1 parking space to zero will increase ADU feasibility on all land where ADUs are permissible in the City. ADUs are most likely to occur in lower density single family zones, representing 75% of all zoned land in the City.

3) Is the amendment's effect furthering the City's needs in accordance with item 1?

    a. Example: Upzoning parcel A from single family to multifamily will increase the number of potential units in the City from 1 single family home to a max 25 unit multi dwelling complex. The HNA projected that the City needs 1,000 units of multifamily housing and 1,000 units of single family housing to meet its needs. The BLI established that there is an overabundance of land zoned single family and a deficit of 3 acres of multifamily land. Thus, while this amendment reduces the amount of prospective single family homes in the City, the BLI demonstrated there is an abundance of land zoned single family and a lack of land zoned multifamily, as well as a need for multifamily units. The amendment will therefore further the City's goal of fulfilling its housing needs. Goal 10 is satisfied.

HPS Review Project

The PAPA project reviewed over 11 HPSs in 2025, writing comment letters and compiling the attached report. HLA's comments resulted in numerous conditions of approval and two remands from DLCD of proposed HPS. Overall trends during the review included these observations:

1) Dire needs articulated but proposed actions did not fully respond to stated needs
2) Seniors and residents with disabilities were completely left out of the analysis, or lumped in with middle housing options
3) Lack of commitment in any reviewed HPS to upzone single family zoned land
4) Good policies and ideas included in the jurisdictions HPS were undermined by lack of commitment and long, ambiguous timelines for implementation.

The PAPA project is currently engaged in developing an AFFH framework for HPSs and compiling data on AFFH compliance within approved HPSs.

Appendix

Contents

Gold Hill Feedback

Hillsboro Feedback

Medford Goal 10 Example

Milwaukie Goal 10 Example

Gmail **Jean Dahlquist <jdahlqu1@gmail.com>**

Fwd: Gold Hill Comprehensive Plan and Zoning Amendments Staff Report

1 message

Mathew H <mathew.jamesfhco@gmail.com> Wed, Dec 3, 2025 at 2:17 AM
To: Jean Dahlquist <jdahlqu1@gmail.com>

Forwarded Conversation

Subject: Gold Hill Comprehensive Plan and Zoning Amendments Staff Report

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From: **Dick Converse** <dconverse@rvcog.org>
Date: Wed, Oct 29, 2025 at 10:07 AM
To: <mathew.jamesfhco@gmail.com>

Hi Mathew,

Thanks for commenting on Gold Hill's comp plan map and code/map amendments. I wrote the staff report and will be making the presentation at tonight's Planning Commission. I minimized the findings about compliance with Statewide Planning Goals because most of the changes are inconsequential with regard to the comprehensive plan and underlying goals. We are simply trying for the maps to reflect Development Code changes approved in 2023 and to align designations with existing land uses. The city is too small to have its own housing needs analysis, but it is part of a regional housing analysis that will factor into future housing decisions. I understand rules are still to be written about ensuring that each level of affordability is met.

One area that might raise concerns in looking at the new map is that there is less R-3 zoning. That area is an elementary school and would be excluded from any buildable lands inventory because it is public land. The City is interested in intensifying residential zoning nearby, but the scope of tonight's review focuses on aligning zoning with existing land uses.

With that being said, one positive change is an intent to increase the number of allowed residential floors above ground-floor commercial uses from one to two in the Downtown zone. This will increase residential opportunities in that zone, and is the chief change that affects the housing goal. I will make note of that at the hearing, making it part of the record.

As part of my coming out of retirement to work for RVCOG again, I will be administering the Housing Assistance grant we received from DLCD/HAPO. We are still working on the details of the agreement, but I will be assisting eight jurisdictions in ensuring compliance with the recent changes in statutes supporting housing. Gold Hill is one of those jurisdictions. I'll look forward to your participation as we progress. Most of the changes are mandated and will have little discretion, but we may be looking for support as we enter the hearings process.

If you are comfortable with what I've expressed, we will be grateful for whatever support you may provide.

Thanks,

Dick Converse

RVCOG Principal Planner

From: **Mathew H** <mathew.jamesfhco@gmail.com>
Date: Fri, Oct 31, 2025 at 9:44 AM
To: Dick Converse <dconverse@rvcog.org>

Happy Halloween Dick,
Thank you for the response and thorough explanation and welcome back to the wonderful world of planning! Since I hope to have an ongoing line of communication with you, I would like to mention a few things.
Allowing a third story increases the capacity for more units which is textbook statewide planning Goal 10. As far as discretion is concerned. Discretion has little to no bearing on when findings must be provided. DLCD was very clear that findings were necessary for HB 2001, which are mandatory. I hope this helps in your writing in the future and please feel free to reach out anytime. Have a happy Halloween!

From: **Dick Converse** <dconverse@rvcog.org>
Date: Mon, Nov 3, 2025 at 9:01 AM
To: Mathew H <mathew.jamesfhco@gmail.com>

Thanks, Mathew! I appreciate your input, and I added the Goal 10 discussion to my verbal presentation last Wednesday. I realize that discretion was probably the wrong word to use, and I am familiar with the need for robust findings. This hearing was a bit unusual because it was cleaning up inconsistencies that should have been addressed when the Code was amended in 2023, presumably with the appropriate references to Statewide Planning Goals. (It's a rare treat to blame an action that occurred under someone else's watch, not something I usually get to do.)

I will look forward to your assistance as we implement the DLCD/HAPO grant. It will be narrowly focused on implementing statute, and even the Statement of Work guidelines notes that "the audits are intended to identify existing adopted statutes and administrative rules and incorporate them into comprehensive plans and development codes, leaving little room for the discussion and input an advisory committee typically would provide. As a result, advisory committees will not be part of this program." Some planners throughout the state have frustration about the process, wondering if there is any value to public hearings since there is little room for discussion. This is probably where I inserted the term discretion into my thinking. The findings should be relatively straightforward and consistent among the jurisdictions, but we will be sure to address the applicable Statewide Planning Goals in our staff reports that will be subject to agency review.

We look forward to beginning the review process by the first of next year, depending upon approval of our work program.

Thanks,

Dick

Searching for "Hillsboro"

Project: FHCO Affirmatively Furthering Fair Housing

Hillsboro CDCA-002-24 Omnibus 8

Posted by Mathew Hogan on Oct 1, 2025

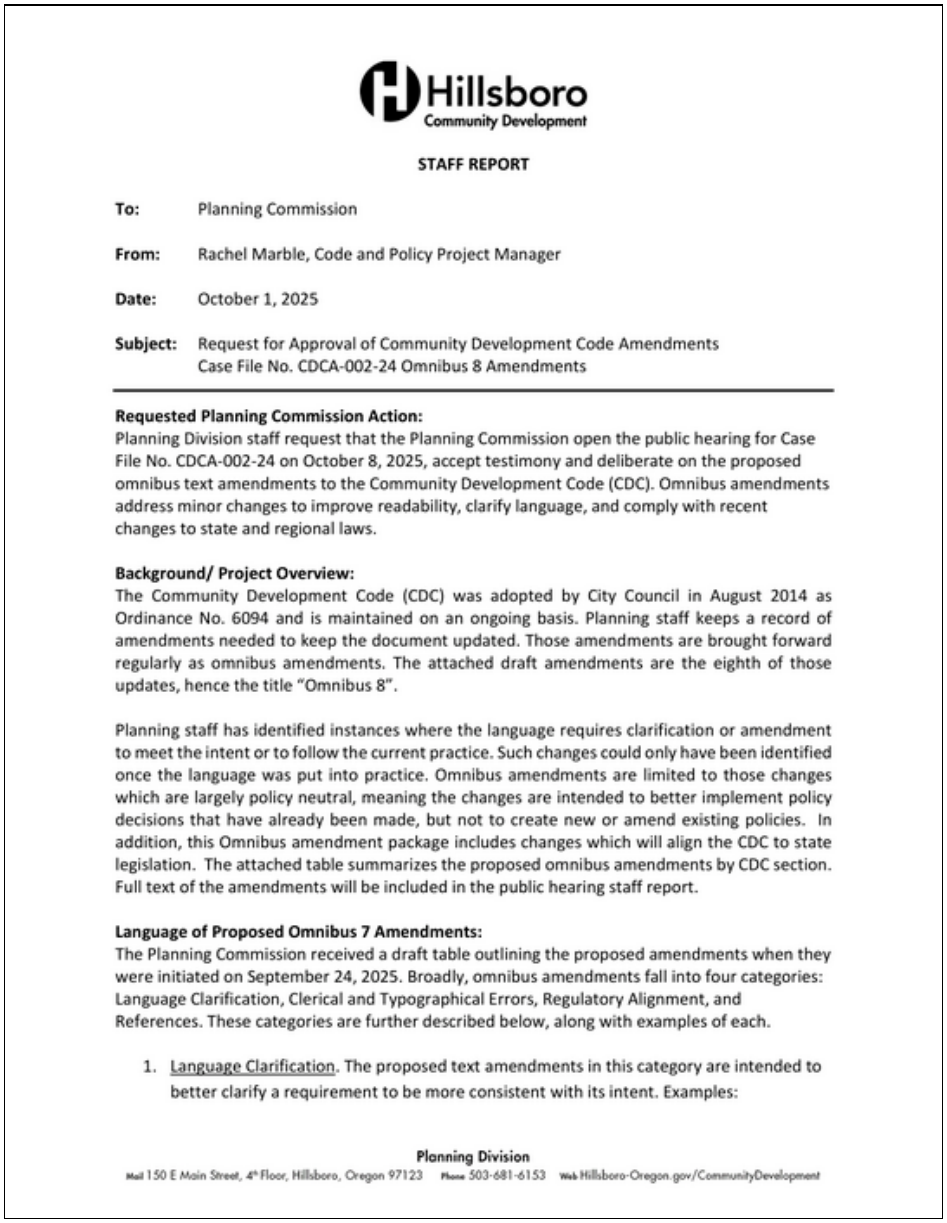


First Hearing Date: 10/8/25
Final Hearing Date:

Staff Contact Info:
Madison Burke
(503) 681-6153
madison.burke@hillsboro-oregon.gov

Summary:
Omnibus amendments address minor changes to improve readability, clarify language, and comply with recent changes to state and regional laws. The proposed text amendments would affect the following subchapters of the Community Development Code (CDC) : 12.01 General Provisions, 12.21 Single Detached and Middle Housing Residential Zones, 12.23 Commercial Zones, 12.24 Mixed-Use and Urban Center Zones, 12.25 Industrial Zones, 12.30 Non-Conforming Situations: Uses, Structures and Lots, 12.40 Special Use Standards,12.50 Development and Design Standards, 12.61 Downtown Plan District, 12.62 Orenco Plan District, 12.64 Amberglen Plan District, 12.70 Procedures, 12.80 Applications. The amendments will include conforming amendments to adopt regulations from recently adopted legislation including SB1537 (2024), HB2138 (2025), SB48 (2025), SB1099 (2025) and SB974 (2025).

Goal 10 Findings: No Goal 10 findings found. Housing mentioned a lot.



Hillsboro
Community Development

STAFF REPORT

To: Planning Commission

From: Rachel Marble, Code and Policy Project Manager

Date: October 1, 2025

Subject: Request for Approval of Community Development Code Amendments
Case File No. CDCA-002-24 Omnibus 8 Amendments

Requested Planning Commission Action:
Planning Division staff request that the Planning Commission open the public hearing for Case File No. CDCA-002-24 on October 8, 2025, accept testimony and deliberate on the proposed omnibus text amendments to the Community Development Code (CDC). Omnibus amendments address minor changes to improve readability, clarify language, and comply with recent changes to state and regional laws.

Background/ Project Overview:
The Community Development Code (CDC) was adopted by City Council in August 2014 as Ordinance No. 6094 and is maintained on an ongoing basis. Planning staff keeps a record of amendments needed to keep the document updated. Those amendments are brought forward regularly as omnibus amendments. The attached draft amendments are the eighth of those updates, hence the title "Omnibus 8".

Planning staff has identified instances where the language requires clarification or amendment to meet the intent or to follow the current practice. Such changes could only have been identified once the language was put into practice. Omnibus amendments are limited to those changes which are largely policy neutral, meaning the changes are intended to better implement policy decisions that have already been made, but not to create new or amend existing policies. In addition, this Omnibus amendment package includes changes which will align the CDC to state legislation. The attached table summarizes the proposed omnibus amendments by CDC section. Full text of the amendments will be included in the public hearing staff report.

Language of Proposed Omnibus 7 Amendments:
The Planning Commission received a draft table outlining the proposed amendments when they were initiated on September 24, 2025. Broadly, omnibus amendments fall into four categories: Language Clarification, Clerical and Typographical Errors, Regulatory Alignment, and References. These categories are further described below, along with examples of each.

1. Language Clarification. The proposed text amendments in this category are intended to better clarify a requirement to be more consistent with its intent. Examples:

Planning Division
Mail 150 E Main Street, 4th Floor, Hillsboro, Oregon 97123 Phone 503-681-6153 Web Hillsboro-Oregon.gov/CommunityDevelopment

Staff Report Packet.pdf

Discuss this message

Ed Sullivan
One of our planners must review the details.
Posted on Oct 1, 2025 – Edit or Delete



Mathew Hogan
From the Planner when asked for more:

"**Goal 10 Findings:**

Oregon Land Use Planning Goal 10 requires the City to provide for its residents' housing needs. In 2023, the City adopted a Buildable Lands Inventory which showed 611 acres of available land for residential development and concluded there is a deficit of 174 acres for residential development. The same year 2023, the city adopted a Housing Needs Analysis (HNA), that shows the city needs an additional 14,046 housing units, broken down by housing type below.

The City is currently in the process of re-adopting its Housing Production Strategy which will document in detail how the City is intending to meet its housing need. As a part of this readoption and implementation, the City will be making amendments to the CDC consistent with the regulatory actions in the strategy aimed at reducing barriers to housing within the code to increase housing production. In the meantime, this amendment will incorporate changes to address language clarification, clerical and typographical errors and updates to references. It also contains conforming amendments to align the CDC with changes to state statute. This included amendments to incorporate language from SB 1537 adopted in 2024 and subsequent technical fixes in SB 48 adopted in 2025. It also includes amendments to codify various changes to Middle Housing Land Divisions and Expedited Land Divisions in HB 2138 adopted in 2025.

SB 1537 (2024) contained requirements for granting mandatory adjustments to certain housing applications presumably to reduce barriers to development of housing. This requirement became operative on January 1, 2025 and the City has been applying the state statute directly to applications as it is not incorporated into the CDC. This amendment will incorporate SB 1537 Mandatory Adjustments by reference and will also clarify how the adjustments are processed. SB 1537 applies to all types of housing documented above in the forecasted future need and by reducing barriers such as development and design standards, this will aid in meeting that need.

HB 2138 (2025) included many provisions affecting middle housing and while the bill was effective immediately as an emergency to address the housing crisis, only certain elements became operable immediately. The provisions regarding Expedited and Middle Housing Land Divisions were effective immediately and in order to provide clarity in the CDC on these applications, these elements are being included in this amendment. The amendment will modify the procedures for these applications to be consistent with the revised language of ORS 92.031, ORS 92.044, ORS 227.178, ORS 197.360 and ORS 197.365. Expedited and Middle Housing Land Divisions will no longer require a public notice and will not include an opportunity for local appeal. Middle Housing Land Divisions can be submitted for review before, during or after building permitting. Lastly, Middle Housing Land Divisions can be submitted and reviewed concurrently with Subdivision or Partition tentative plats. The City conducted a Housing Code Audit in 2025 and one recommendation from the audit was to allow middle housing land divisions to be submitted at any time and not be tied to permit issuance as this was creating a barrier for developers of middle housing. The HNA cited a need for an additional 3,821 middle housing units. While incorporating HB 2138 into the code will not have measurable impacts to the production of housing, it will add development potential by reducing process barriers in the code and will apply

to all residential zones which allow middle housing.

Lastly, the amendment will ensure that the CDC is consistent with ORS 197.015 which requires tentative Subdivision plats be reviewed as a limited land use decision. The CDC currently has thresholds for Major and Minor Subdivisions. If an application for a Subdivision is for more than 5 acres, more than 20 lots or units or within a light rail or conservation zone, the application is processed as a Type III Quasi-judicial decision. To align the code with the statute, the requirement for a Type III Subdivision based on thresholds will be removed and all tentative Subdivision plats will be processed as Type II land use decisions based on clear and objective standards. Again, while this change will not have a measurable impact on housing production, it will add development potential by reducing a process barrier and creating certainty for applicants in the land division process. It will decrease the processing time of the application and reduce the decision level to a staff level".

Posted on Oct 2, 2025 – Edit or Delete

Mathew Hogan

Here is the table that didn't copy over.

Posted on Oct 2, 2025 – Edit or Delete

Figure 36. Summary of Forecasted Future Unit Need (2043)

TOTAL HOUSING UNITS									
			Multi-Family						
Unit Type:	Single Detached	Single Attached	2-unit	3- or 4-plex	5+ Units MFR	Manuf. home	Boat, RV, other temp	Total Units	% of Units
Totals:	5,073	2,165	654	1,002	4,990	162	0	14,046	100%
Percentage:	36.1%	15.4%	4.7%	7.1%	35.5%	1.2%	0.0%	100%	

image001.png

Ed Sullivan

I think this does the trick, unless one of our planners thinks otherwise.

Posted on Oct 2, 2025 – Edit or Delete

Mathew Hogan

Sounds good Ed. Jean can you or one of the volunteers look this Amendment and the subsequent findings over?

Posted on Oct 2, 2025 – Edit or Delete



Jean Dahlquist

Going to take a quick look. The effort is definately there. Yom Kippur yesterday so was out.

Posted on Oct 3, 2025 – Edit or Delete



Jean Dahlquist

I like the removal of this.... One off-street parking space per two bedrooms is required. If there are an odd number of
bedrooms, the parking requirement is rounded up pursuant to Section 12.01.400.

Posted on Oct 3, 2025 – Edit or Delete



Jean Dahlquist

Can you ask about the removal of this language: 6. Failure to Approve or Deny Application Within Specified Time.
a Except as provided in paragraph b below, if the City does not make a decision on an ELD or MHLD within 63 days after the application is deemed complete, the applicant may apply in the Washington County circuit court for a writ of mandamus to compel the City to issue the approval. The writ shall be issued unless the City shows that the approval would violate a substantive provision of the applicable land use regulations or the requirements of ORS 197.360. A decision of the circuit court under this section may be appealed only to the Court of Appeals.
132
b. After 7 days' notice to the applicant, the City Council may, at a regularly scheduled public meeting, take action to extend the 63-day time period to a date certain for 1 or more applications for an ELD or MHLD prior to the expiration of the 63-day period, based on a determination that an unexpected or extraordinary increase in applications makes action within 63 days impracticable. In no case shall an extension be to a date more than 120 days after the application was deemed complete. Upon approval of an extension, the provisions of ORS 197.360 to 197.380, including the mandamus remedy provided by paragraph a, shall remain applicable to the ELD or MHLD, except that the extended period shall be substituted for the 63-day period wherever applicable.

Posted on Oct 3, 2025 – Edit or Delete



Jean Dahlquist

Pg 131 and 132. I may be missing it but the 63 day rule is still in place, but what happens if it isn't followed?

Posted on Oct 3, 2025 – Edit or Delete

Mathew Hogan
From the planner:

"That language was amended in HB 2138 but wasn't rewritten correctly in our amendment. This will be corrected in the supplemental staff report when the Goal 10 findings are published.
This is what the new language will state, consistent with HB 2138.

Posted on Oct 8, 2025 – Edit or Delete

6. Failure to Approve or Deny Application Within Specified Time.

   a. ~~Except as provided in paragraph b below, if the City does not make a decision on an ELD or MHLD within 63 days after the application is deemed complete, the applicant may apply in the Washington County circuit court for a writ of mandamus to compel the City to issue the approval. The writ shall be issued unless the City shows that the approval would violate a substantive provision of the applicable land use regulations or the requirements of ORS 197.360. A decision of the circuit court under this section may be appealed only to the Court of Appeals.~~ *Pursuant to ORS 227.178, the City will reach a final decision on an application within 63 days from the date the application is determined to be or deemed complete unless the applicant agrees to extend the timeline as allowed below.*

   b. ~~After 7 days' notice to the applicant, the City Council may, at a regularly scheduled public meeting, take action to extend the 63-day time period to a date certain for 1 or more applications for an ELD or MHLD prior to the expiration of the 63-day period, based on a determination that an unexpected or extraordinary increase in applications makes action within 63 days impracticable. In no case shall an extension be to a date more than 120 days after the application was deemed complete. Upon approval of an extension, the provisions of ORS 197.360 to 197.380, including the mandamus remedy provided by paragraph a, shall remain applicable to the ELD or MHLD, except that the extended period shall be substituted for the 63-day period wherever applicable.~~ *Pursuant to ORS 227.178, the 63 day timeline may be extended at the written request of the applicant. The total of all extensions may not exceed 245 days.*

image001.png

Jean Dahlquist
Great!
Posted on Oct 8, 2025 – Edit or Delete

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MEDFORD
PLANNING

STAFF REPORT

for a Type-III quasi-judicial decision: **Type III Zone Change**

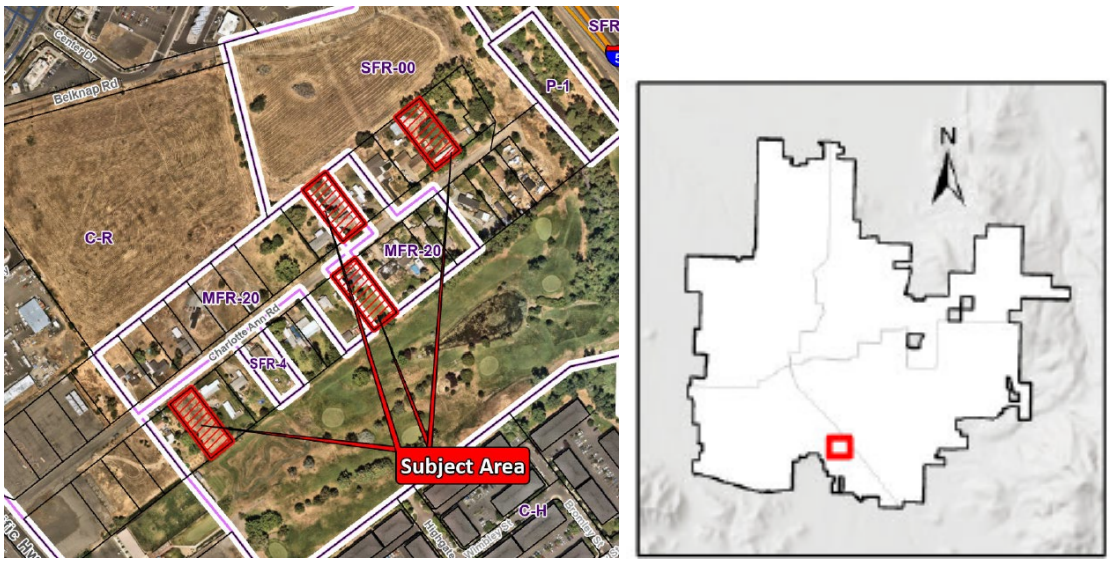
Project	Charlotte Ann Road Zone Change	
File no.	ZC-25-006	
To	Planning Commission	*for April 24, 2025 hearing*
From	Sarah Sousa, Planner III	
Reviewer	Carla Angeli Paladino, Principal Planner	
Date	April 17, 2025	

BACKGROUND

Proposal

Consideration of a city-initiated zone change from SFR-00 (Single Family Residential, 1 unit per existing lot) to MFR-20 (Multi-Family Residential -20 units per gross acre) of four parcels totaling approximately 1.75 acres, located on Charlotte Ann Road (371W32C Tax Lots 2000, 2201, 3400, and 4000).

Vicinity Map



Subject Site Characteristics

Property	GLUP	Existing Zone	Proposed Zone	Existing Use	Acreage	Owner
445 Charlotte Ann Road	UH	SFR-00	MFR-20	Single family home	0.43	Deborah Corning
535 Charlotte Ann Road	UH	SFR-00	MFR-20	Single Family home	0.43	Jon Paauwe
430 Charlotte Ann Road	UH	SFR-00	MFR-20	Single Family Home	0.44	Jacob Brown
No address 371W32C4000	UH	SFR-00	MFR-20	Vacant	0.45	Michael/Patricia Johnson
				Total Acreage	**1.75**	

All of the owners of the above properties have consented in writing to the subject zone change.

Surrounding Site Characteristics

North Zone: Regional Commercial and SFR-00
Use(s): Vacant Land

South Zone: SFR-00
Use(s): Bear Creek Golf Course

East Zone: SFR-00 and SFR-4
Use(s): Bear Creek / Interstate 5

West Zone: Light Industrial (across South Pacific Highway)
Use(s): Harry & David facility

Related Projects

CP-13-032 UGBA Phase 1: Internal GLUP Amendment

Approval Authority

This is a Type III land use decision. The Planning Commission is the approving authority under Medford Land Development Code (MLDC) Section 10.108(1).

ISSUES AND ANALYSIS

Background

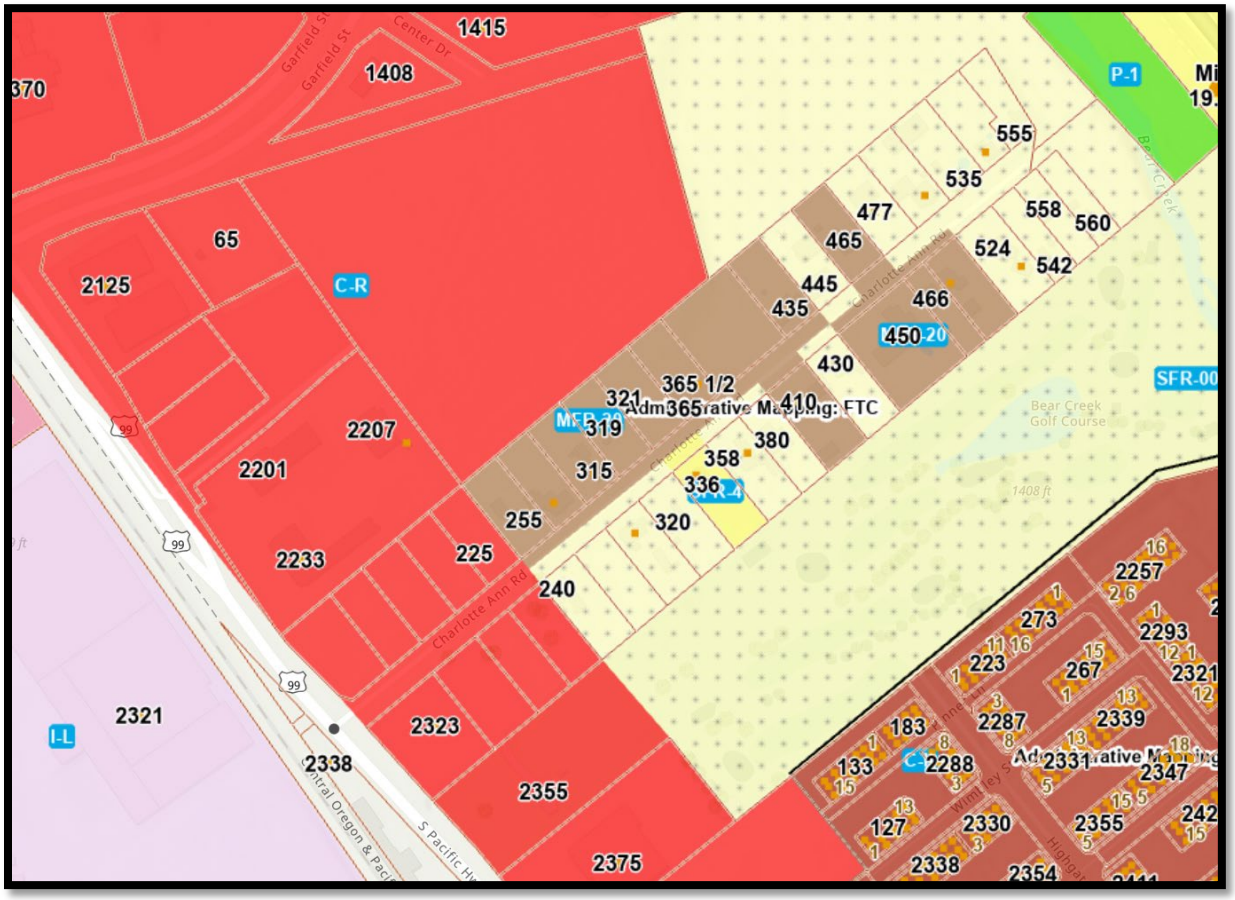
As part of the Urban Growth Boundary Amendment process, the City changed the General Land Use Plan (GLUP) designations of approximately 500 acres to improve land use efficiency in 2014. General Land Use Plan map changes were made to re-classify lands, known as the Selected Area Lands (SALs). The changes were primarily from Industrial to Commercial or from low density residential to medium or high density residential. Each of the subject properties were included in that process in 510b, a 23 acre area that changed from Urban Residential to Urban High Density Residential. This process did not include zone changes corresponding to the new General Land Use Plan designations.

To promote more housing, the City initiated a program to process zone changes on behalf of consenting property owners that were included in the Selected Area Lands. This program is aimed at smaller properties that were given a Medium or High Density Residential General Land Use Plan designation. This is the fifth round of City-initiated zone changes since 2020. Zone changes approved with this program include one in the same vicinity (ZC-21-073). The previous rounds of City-initiated zone changes are shown below.

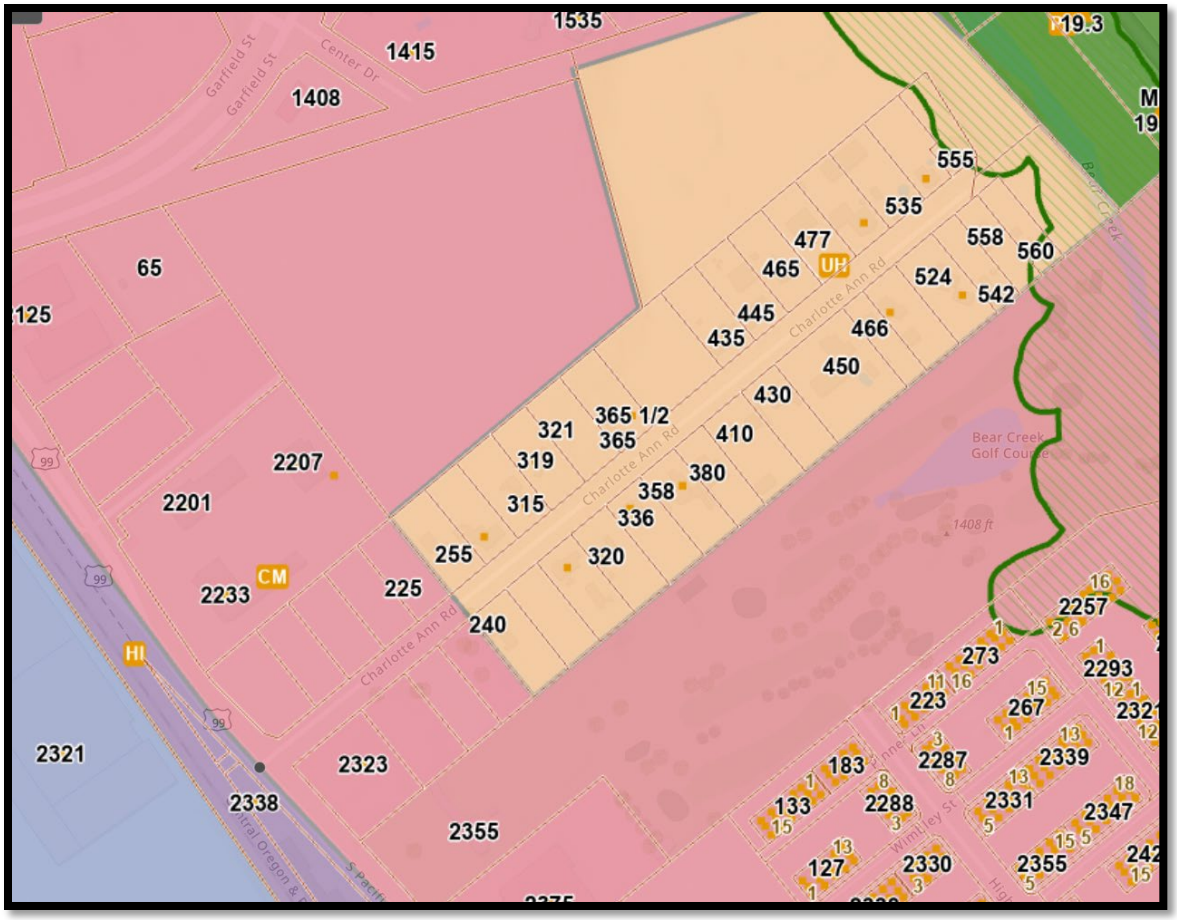
File No.	Name of Project	# of Properties	Acreage
ZC-20-256	Westwood Drive Zone Change to MFR-15 and MFR-20	6	9.44
ZC-20-324	Coker Butte Road and Springbrook Road Zone Change to MFR-15	5	5.64
ZC-21-073	Charlotte Ann Zone Change to MFR-20	11	5.57
ZC-23-195	Sunset Avenue and Westwood Avenue Zone Change to MFR-20	7	8.5

This round meets one of the Planning Department's 2024-2025 performance measures.

Zoning Map



GLUP Map



Analysis

GLUP/TSP Consistency

The General Land Use Plan (GLUP) designation for the subject areas is UH (Urban High Density Residential). According to the General Land Use Plan Element of the *Comprehensive Plan*, the MFR-20 zoning district is the permitted zone within that designation.

A traffic Impact Analysis (TIA) is required when an application has the potential of generating more than 250 net Average Daily Trips (ADT). Based upon the increase of vehicle trips that would be generated by the proposed new zoning, an analysis was required and submitted with the application. The Public Works Department reviewed the analysis and submitted comments are discussed below.

Locational Criteria

Zone changes to multi-family zones do not include locational criteria.

Facility Adequacy

MLDC 10.204(3) requires demonstration that Category A facilities (storm drainage, sanitary sewer, water and transportation) must already be adequate in condition, capacity and location to serve the property or be extended or otherwise improved to adequately serve the property at the time of issuance of a building permit for vertical construction.

The agency comments included in Exhibits B-E, demonstrate that Category A facilities are adequate to serve the properties at the time of development.

Committee Comments

No other issues were identified by staff.

FINDINGS AND CONCLUSIONS

Applicable Criteria MLDC Section 10.204: Zone Change Criteria

The Planning Commission shall approve a quasi-judicial, minor zone change if it finds that the zone change complies with subsections (1) through (3) below:

(1) The proposed zone is consistent with the Transportation System Plan (TSP) and the General Land Use Plan Map designation. A demonstration of consistency with the acknowledged TSP will assure compliance with the Oregon Transportation Planning Rule.

Findings

Medford's Transportation System Plan (TSP) provides a framework for the implementation of the statewide Transportation Goal (Goal 12). It explains how government agencies are responsible for transportation planning to address all modes of travel along with existing and future transportation needs.

Land Development Code Sections 10.460 and 10.461 identifies when a traffic impact analysis is needed based upon proposed development. An analysis is required when the proposed zoning on property has the potential to generate more than 250 net average daily vehicle trips beyond the existing zoning. The proposed zoning is expected to generate an increase of more than 250 average daily trips than with the existing zoning. Since this is in excess of 250 average daily trips, a traffic impact

analysis was required to be submitted. An analysis was performed by Southern Oregon Transportation Engineering. The report shows no significant impact to the transportation system (Exhibit F). The Medford Public Works Department – Traffic Engineering Division reviewed the traffic impact analysis and agreed with that conclusion.

The proposed MFR-20 zoning is consistent with the properties underlying General Land Use Plan designation of Urban High Density Residential (UH).

Conclusions

Satisfied. The net increase in vehicle trips generated with the proposed zone change required a traffic impact analysis to be submitted. A traffic impact analysis was submitted that found no significant impact to the transportation system.

The subject properties General Land Use Plan designation is UH. The MFR-20 zoning is found to be consistent with the UH designation. The Commission can find this criterion is satisfied.

(2) Where applicable, the proposed zone shall also be consistent with the additional locational standards of the below sections (1)(a), (1)(b), (1)(c), or (1)(d). Where a special area plan requires a specific zone, any conflicting or additional requirements of the plan shall take precedence over the locational criteria below.

Findings

There are no additional locational standards for the multi-family zones. Also, none of the subject properties are in a special plan area.

Conclusions

Not Applicable. No locational criteria exist for the proposed multi-family zones and none of the properties are in a special plan area. The Commission can find this criterion is not applicable.

(3) It shall be demonstrated that Category A urban services and facilities are available or can and will be provided, as described below, to adequately serve the subject property with the permitted uses allowed under the proposed zoning, except as provided in subsection (c) below. The minimum standards for Category A services and facilities are contained in

Section 10.462 and Goal 2 of the Comprehensive Plan "Public Facilities Element" and Transportation System Plan.

(a) Storm drainage, sanitary sewer, and water facilities must already be adequate in condition, capacity, and location to serve the property or be extended or otherwise improved to adequately serve the property at the time of issuance of a building permit for vertical construction.

(b) Adequate streets and street capacity must be provided in one (1) of the following ways:

(i) Streets which serve the subject property, as defined in Section 10.461(2), presently exist and have adequate capacity; or

(ii) Existing and new streets that will serve the subject property will be improved and/or constructed, sufficient to meet the required condition and capacity, at the time building permits for vertical construction are issued; or

(iii) If it is determined that a street must be constructed or improved in order to provide adequate capacity for more than one (1) proposed or anticipated development, the Planning Commission may find the street to be adequate when the improvements needed to make the street adequate are fully funded. A street project is deemed to be fully funded when one of the following occurs:

(a) the project is in the City's adopted capital improvement plan budget, or is a programmed project in the first two (2) years of the State's current STIP (State Transportation Improvement Plan), or any other public agencies adopted capital improvement plan budget; or

(b) when an applicant funds the improvement through a reimbursement district pursuant to the MLDC. The cost of the improvements will be either the actual cost of construction, if constructed by the applicant, or the estimated cost. The "estimated cost" shall be 125% of a professional engineer's estimated cost that has been approved by the City, including the cost of any right-of-way acquisition. The method described in this paragraph shall not be used if the Public Works Department determines, for reasons of public safety, that the improvement must be constructed prior to issuance of building permits.

(iv) When a street must be improved under (b)(ii) or (b)(iii) above, the specific street improvement(s) needed to make the street adequate must be identified, and it must be demonstrated by the applicant that the improvement(s) will make the street adequate in condition and capacity.

(c) In determining the adequacy of Category A facilities, the approving authority (Planning Commission) may evaluate potential impacts based upon the imposition of special development conditions attached to the zone change request. Special development conditions shall be established by deed restriction or covenant, which

must be recorded with proof of recordation, returned to the Planning Department, and may include, but are not limited to the following:

(i) Restriction of uses by type or intensity; however, in cases where such a restriction is proposed, the Planning Commission must find that the resulting development pattern will not preclude future development, or intensification of development, on the subject property or adjacent parcels. In no case shall residential densities be approved which do not meet minimum density standards,

(ii) Mixed-use, pedestrian-friendly design which qualifies for the trip reduction percentage allowed by the Transportation Planning Rule,

(iii) Transportation Demand Management (TDM) measures which can be reasonably quantified, monitored, and enforced, such as mandatory car/van pools.

Findings

The Public Facilities Element of the Medford Comprehensive Plan provides a list of Category "A" services and facilities to be considered, which include water service, sanitary sewer, storm drainage, streets & transportation facilities. Below is a discussion of each.

Water Service

The Medford Water Commission has no objection to the proposed zone change (Exhibit D). Their memo states there is a 6-inch water main within Charlotte Ann Road. Future development may be required to upgrade the water line within Charlotte Ann Road.

Sewer Service

The subject properties are within the Rogue Valley Sewer Services (RVSS) area. There is an existing 12-inch sewer main along Charlotte Ann Road. According to RVSS, there is adequate system capacity for the proposed zone change (Exhibit E).

Storm Drainage

According to the Public Works Report, there are roadside ditches on the north and south sides of Charlotte Ann Road (Exhibit B). The stormwater from Charlotte Ann Road has historically drained across two tax lots at the east end of the street. The drainage comes together and drains north paralleling Bear Creek.

Transportation

All the subject properties have access on Charlotte Ann Road. Charlotte Ann is a local street in the City of Medford but maintained by Jackson County. Charlotte Ann Road is accessed of South Pacific Highway, a state highway.

Rogue Valley Transportation District (RVTD) provides transit services within the vicinity of the subject properties. A transit stop is available across from Charlotte Ann at the west side of the highway (southbound stop). Approximately 650 feet south of Charlotte Ann Road (on the east side of the highway) is another transit stop (northbound stop). In regards to air travel, the Medford Jackson County International Airport is located approximately 5 miles from the subject properties.

The Public Works Department reviewed the traffic impact analysis submitted from Southern Oregon Transportation Engineering. The analysis evaluated street and intersection capacity, sight distance, queuing, turn lane criteria, and crash history. The summary of that study states that the zone changes can be approved without causing adverse impacts on the transportation system. The Public Works Department memo concurs with that analysis.

Conclusions

Satisfied. The agency comments included in Exhibits B-E demonstrate that Category A facilities are adequate to serve the properties at the time of development. The Commission can find that this criterion is met.

Goal 10 Findings

Goal 10 requires that *"plans shall encourage the availability of adequate number of needed housing units at price ranges and rent levels which are commensurate with financial capabilities of Oregon households and allow for flexibility of housing location, type, and density."*

The subject properties all have the Urban High Density Residential General Land Use Plan (GLUP) designation. The single family holding zoning on the properties is not consistent with the GLUP designation. The current zoning only allows for detached single family homes and accessory dwelling units. All the subject properties are changing to the MFR-20 zoning which allows for more diverse housing types, including townhomes, duplexes, apartments, mobile home parks, and group quarters.

Medford's Housing Element – Needed Housing between 2022-2042	
Single Family Detached	7,207 dwelling units
Single Family Attached	917 dwelling units
Duplexes, Triplex, Quadplex	1,703 dwelling units
Multi-Family Attached	3,275 dwelling units
Total	**13,102 dwelling units**

In addition, the proposed zoning allows for more housing units than is allowed in the current zone. The number of units allowed under the existing zone for the subject properties is a maximum of 4 units. Under the proposed zoning, the number of units allowed is 30-40.

Conclusions

Satisfied. The proposed zoning would allow a minimum of 26 more units than what would be allowed under the current zoning. This allowance for more housing types and more units provides greater opportunities for housing people of all income levels.

RECOMMENDED ACTION

Adopt the findings as recommended by staff and direct staff to prepare the final order for approval of ZC-25-006 per the staff report dated April 17, 2025, including Exhibits A through F.

EXHIBITS

A Assessor's Map for subject properties
B Public Works Department Memo dated March 5, 2025
C Jackson County Roads Memo dated February 24, 2025
D Medford Water Commission Memo dated February 26, 2025
E Rogue Valley Sewer Service Memo dated February 19, 2025
F Traffic Impact Analysis Summary
Vicinity Map

PLANNING COMMISSION AGENDA: APRIL 24, 2025

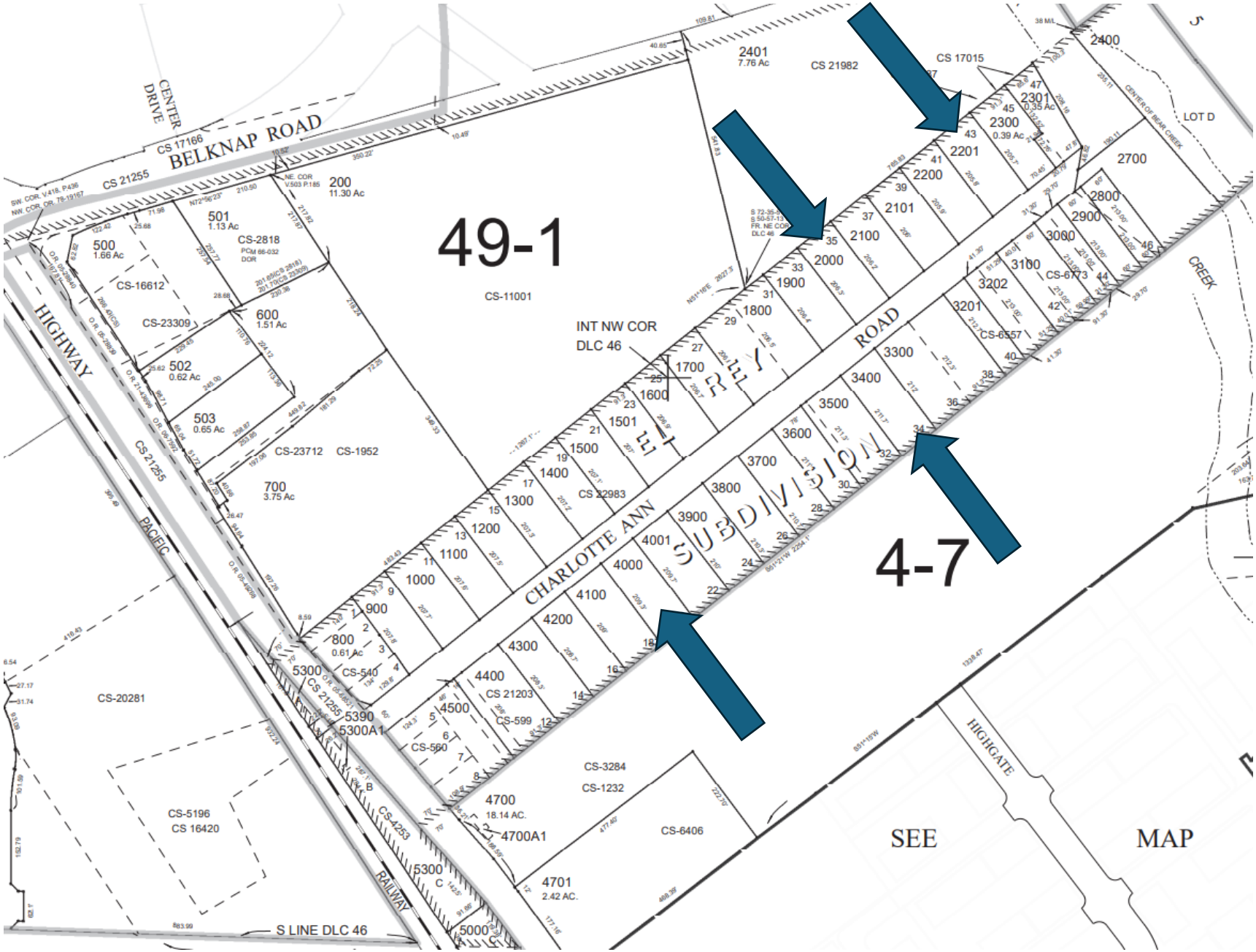

49-1
4-7
BELKNAP ROAD
CS 17166
CS 21255
CENTER DRIVE
HIGHWAY
PACIFIC
RAILWAY
CHARLOTTE ANN ROAD
CREEK
LOT D
HIGHGATE
SEE MAP
INT NW COR DLC 46
S LINE DLC 46
CS-11001
CS 21982
CS 17015
CS 22983
CS 21203
CS-20281
CS-5196
CS 16420
CS-6406
CS-3284
CS-1232
CS-4253
CS-2818
CS-16612
CS-23309
CS-23712
CS-1952
CS-540
CS-560
CS-599
CS-6773
CS-6557
200 11.30 Ac
500 1.66 Ac
501 1.13 Ac
502 0.62 Ac
503 0.65 Ac
600 1.51 Ac
700 3.75 Ac
800 0.61 Ac
2401 7.76 Ac
2300 0.39 Ac
2301 0.35 Ac
4700 18.14 AC.
4700A1
4701 2.42 AC.
5300
5300A1
5300 B
5300 C
5390
5000 C

EXHIBIT A

LD DATE: 3/5/2025
File Number: ZC-25-006

PUBLIC WORKS DEPARTMENT STAFF REPORT

Charlotte Anne Road (TLs 2000, 2201, 3400 & 4000) Zone Change – SFR-00 to MFR-20

Project: Proposal for a city-initiated zone change from SFR-00 (Single Family Residential, 1unit per existing lot) to MFR-20 (Multi Family Residential, 20 dwelling units per gross acre) of four parcels totaling approximately 1.75 acres.

Location: The parcels are located on Charlotte Ann Road (371W32C Tax Lots 2000, 2201, 3400, and 4000).

Applicant: Applicant/Agent: City Initiated; Planner: Sarah Sousa

---

The Medford Land Development Code (MLDC), Section 10.204(2)(c) requires a zone change application demonstrate Category 'A' urban services and facilities are available or can and will be provided to adequately serve the subject property. The Public Works Department reviews zone change applications to assure the services and facilities under its jurisdiction meet those requirements. The services and facilities that the Public Works Department manages are sanitary sewers within the City's service boundary, storm drains, and the transportation system.

I. Sanitary Sewer Facilities

This site lies within the Rogue Valley Sewer Service (RVSS) area. The Applicant shall contact RVSS to see if sanitary sewer services and facilities are available and have capacity to serve this property under the proposed zoning.

II. Storm Drainage Facilities

There are currently roadside ditches on the north and south sides of Charlotte Ann Road. The stormwater from Charlotte Ann Road has historically drained across the two tax lots (2700/2401) at the east end of the street. The drainages come together and appear to drain north paralleling Bear Creek.

EXHIBIT B

Public Works does not see a storm drainage easement or restricted zone change being necessary due to the following:

- The roadway has historically drained through tax lots 2700 and 2401.
- There does not appear to be any risk of property damage to structures down gradient of the roadway.
- At the end of Charlotte Ann Road, the two tax lots are almost wholly within the Riparian Corridor and are in the mapped floodway for Bear Creek.
- Future development on these properties will require stormwater quality treatment, retention, and detention, which shall comply with Medford Land Development Code (MLDC) Sections 10.486 and 10.729 and the Rogue Valley Stormwater Quality Design Manual. This will limit post-development stormwater outflow to pre-development levels.

For comparison, ZC20-256 was a City-initiated zone change along Westwood Drive. Public Works conditions called for a restricted zone change due to Westwood Drive not having connection to a drainage facility as a pipe or swale was needed to accommodate drainage to Little Elk Creek.

III. Transportation System

Public Works received a Transportation Impact Analysis (TIA) from Southern Oregon Transportation Engineering, dated December 30, 2024, titled "Charlotte Ann Road SFR-00 To MFR-20 Zone Change." The development is to occur on parcels 371W33C 2000, 2001, 3400 and 4000, comprised of 1.75 acres, located on Charlotte Ann Road.

No conditions pertaining to streets, street capacity, or access are requested by Public Works at this time.

Prepared by: Lyndee Stidham
Reviewed by: Doug Burroughs

The above report is based on the information provided with the Zone Change Application submittal and is subject to change based on actual conditions, revised plans and documents or other conditions. A full report with additional details on each item as well as miscellaneous requirements for the project, including requirements for public improvement plans (Construction Plans), design requirements, phasing, draft and final plat processes, permits, system development charges, pavement moratoriums and construction inspection shall be provided with a Development Permit Application.

JACKSON COUNTY
Roads

Bron Johnson
Construction Manager

200 Antelope Road
White City, OR 97503
Phone: (541) 774-6274
Fax: (541) 774-6295
JohnsoBL@jacksoncounty.org

www.jacksoncounty.org

February 24, 2025

Attention: Sarah Sousa
Planning Department
City of Medford
200 South Ivy Street, Lausmann Annex, Room 240
Medford, OR 97501

RE: Planning File: ZC-25-006; 371W32C Tax Lots 2000, 2201, 3400, & 4000
Zone change of four parcels on
Charlotte Ann Road – a County maintained road

Thank you for the opportunity to comment on this proposal for a city-initiated zone change from SFR-00 (Single Family Residential, 1unit per existing lot) to MFR-20 (Multi Family Residential, 20 dwelling units per gross acre) of four parcels totaling approximately 1.75 acres, located on Charlotte Ann Road (371W32C Tax Lots 2000, 2201, 3400, and 4000).

Jackson County Roads have the following comments:

1. Jackson county has reviewed the TIA dated December 30, 2024, prepared by Southern Oregon Transportation and finds the document to be acceptable.

2. Jackson County's General Administration Policy #1-45 sets forth the County's position as it relates to the management of County roads located within existing or proposed city limits or Urban Growth Boundaries (UGB). The County has no current plans for improvements to Charlotte Anne Road. Jackson County Roads recommends that the city request road jurisdiction.

3. Any new or improved roads inside the Urban Growth Boundary or expanded Urban Growth Boundary shall be permitted, inspected and become the sole jurisdiction of the City of Medford.

4. This road was built to a rural low volume standard that is no longer current. This road was not built to commercial/industrial standards and will not withstand the additional traffic. Due to recent zoning changes in the area, Jackson County is concerned and Jackson County will not allow new access to Charlotte Ann Road.

5. If county storm drain facilities are to be utilized, the applicant's registered Engineer shall provide a hydraulic report and plans for review and approval by Jackson County Roads. Storm drainage runoff is limited to that area currently draining to the County storm drainage system. Capacity improvements or on-site

EXHIBIT C

detention, if necessary, shall be installed at the expense of the applicant. Upon completion of the project the developer's Engineer shall certify that the construction of the drainage system was constructed per the approved plan. A copy of the certification shall be sent to Jackson County Roads.

6. Storm water should meet City of Medford requirements that also include water quality. Please note that there are drainage problems in this area and the City of Medford maintains the storm water system.

7. Charlotte Ann Road is a County Urban Local Road and is maintained by the County. The Average Daily Traffic count is inactive at this time. It was 342 on 8/17/1998, 1033 feet east of Highway 99

8. ADA curb ramps must be located wherever there are curbs or other barriers to entry from a pedestrian walkway or sidewalk, including any intersection where it is legal for a pedestrian to cross the street, whether or not there is any designated crosswalk.

9. The applicant shall submit construction plans to Jackson County Roads, so we may determine if county permits will be required.

10. We would like to be notified of future development proposals, as county permits may be required.

11. Please contact the Oregon Department of Transportation for comments.

If you have any questions or need further information feel free to call me at 774-6274.

Respectfully,

Bron Johnson
Construction Manager

MEDFORD WATER

Staff Memo

TO: Planning Department, City of Medford

FROM: Juston Menteer; System Development Engineering Tech

SUBJECT: ZC-25-006 (City-Initiated Zone Change)

PARCEL ID: 37-1W-32C Tax Lots 2000, 2201, 3400, and 4000

PROJECT: Proposal for a city-initiated zone change from SFR-00 (Single Family Residential, 1unit per existing lot) to MFR-20 (Multi Family Residential, 20 dwelling units per gross acre) of four parcels totaling approximately 1.75 acres, located on Charlotte Ann Road (371W32C Tax Lots 2000, 2201, 3400, 4000 and 4100).

Agent contact: City Sponsored Application

City Planner: Sarah Sousa, Planner III sarah.sousa@cityofmedford.org

Associated Files: NONE

MEMO DATE: 2-26-25 **LAND DEVELOPMENT COMMITTEE DATE:** 3-5-25

I have reviewed the project application provided above, as requested. The purpose of this memo is to furnish the Applicant with all pertinent information and requirements necessary for a successful approval process with Medford Water. Please take note of the following comments and conditions.

COMMENTS:

1. Medford Water has sufficient capacity for the proposed zone change from SFR-00 (Single Family Residential, 1 unit per existing lot) to MFR-20 (Multi Family Residential, 20 dwelling units per gross acre) of four parcels totaling approximately 1.75 acres.

2. An existing 6” waterline runs within Charllotte Anne Rd.

3. The project is within Medford Water’s gravity pressure zone.

4. Given the size of the water line and the request for multi-family zoning, future development may be required to upgrade the water line within Charlotte Anne Rd. This could include upgrading the 6-inch main from South Pacific Hwy to full frontage of any future site. Such upgrades may be necessary to meet required fire flow standards for future developments. Future developments should coordinate with Medford Water and City of Medford Fire for such conditions.

STANDARD CONDITIONS:

EXHIBIT D

1. The water facility planning/design/construction process will be done in accordance with the current Medford Water “Regulations Governing Water Service” and “Standards for Water

200 S. Ivy Street, Room 177
Medford, Oregon 97501
Phone (541) 774-2430
www.medfordwater.org
water@medfordwater.org
Fax (541) 774-2555

Facilities/Fire Protection Systems/Backflow Prevention Devices."

2. Applicant's plans, easement documents and other relevant documents shall be submitted directly to Medford Water for review at EngineeringReview@MedfordWater.org. For the best possible coordination, it is suggested that submittal to Medford Water occur concurrently with submittal of the utility site plans to the City of Medford. The Applicant's Civil Engineer shall coordinate with Medford Water Engineering staff to obtain approval of water facility plans. Additional reviews may be required once water construction plans are submitted to ensure compliance with Medford Water Standards.

3. Medford Water reserves the right to request additional requirements if the application is altered or modified.

4. Applicant's Civil Engineer shall coordinate with Medford Water Engineering staff for size and location of the water meter(s) and payment of any installation and SDC fees. Please carefully consider the proposed locations for water services to ensure that adequate separation will be provided between the proposed trees and existing and proposed water facilities. Water meters may not be located within driveways, including flares.

5. Appropriate easements must be dedicated over public water main facilities (including fire services, fire hydrants, ARVs and water services/meters) which cross through or lie within private property.

6. Water services (including irrigation services) may not be "shared" across property lines; each lot must have its own water service(s).

7. Installation of an Oregon Health Authority approved backflow device is required for all commercial, industrial, municipal, and multi-family developments for all water services (domestic, irrigation, fire) and when additional or secondary water sources exist on a parcel (such as a well). *Appropriate backflow prevention devices will be verified on all new and existing services during plan review.* New backflow prevention devices shall be tested by an Oregon-certified backflow assembly tester. See the Oregon Health Authority's website for list of certified testers at the following web link: https://www.oregon.gov/oha/PH/healthyenvironments/drinkingwater/crossconnection/pages/publiclist.aspx.



ZC-25-006

City-Initiated Zone Change

371W32C Tax Lots 2000, 2201, 3400, and 4000

MEDFORD WATER

N

1" = 300'

Page Size: Letter

0 100 200 300 400 500 600

Feet

OCRS Grants Pass-Ashland NAD 1983 2011 TM Feet Intl

This map is based on a digital database compiled by Medford Water from a variety of sources. Medford Water cannot accept responsibility for errors, omissions, or positional accuracy. There are no warranties, expressed or implied. MW GIS 20250304 JWMenteer

ROGUE VALLEY
SEWER SERVICES
CLEAN WATER - HEALTHY COMMUNITIES

February 19, 2025

City of Medford Planning Department
200 S. Ivy Street
Medford, OR 97501

Re: ZC-25-006, City-Initiated Zone Change (371W32C Tax Lots 2000, 2201, 3400, and 4000)

ATTN: Sarah,

The subject property is within the RVSS service area. There is an existing 12 inch sewer main along Charlotte Ann Rd which has adequate capacity within the adjacent sewer system to support the proposed zoning. Future development must comply with RVSS standards.

Sincerely,

Nicholas R. Bakke, P.E.
District Engineer

EXHIBIT E

(541) 664-6300
www.RVSS.US
138 W Vilas Rd, Central Point, OR 97502
P.O. Box 3130, Central Point, OR 97502

Charlotte Ann Road SFR-00 to MFR-20 Zone Change

Traffic Impact Analysis

December 30, 2024

Prepared By: Transportation Engineering, LLC

Southern Oregon Transportation Engineering, LLC

EXHIBIT F

I. EXECUTIVE SUMMARY

Summary

Southern Oregon Transportation Engineering, LLC prepared a traffic impact analysis for a proposed zone change from Single Family Residential SFR-00 to Multifamily Residential MFR-20 in Medford, Oregon. The subject property consists of five parcels located along Charlotte Ann Road, east of OR 99 (371W32C tax lots 2000, 2201, 3400, 4000 and 4100).

Four of the five parcels currently have single family dwelling units residing on them. Access is provided directly from Charlotte Ann Road. No other access was assumed in the analysis.

One study area intersection was evaluated under existing year 2024 and future year 2038 no-build and build conditions. The study area intersection is considered an ODOT facility, but the connecting street (Charlotte Ann Road) is under County jurisdiction.

Conclusions

The findings of the traffic impact analysis conclude that the proposed zone change from SFR-00 to MFR-20 can be approved without causing adverse impacts on the transportation system. The analysis evaluated street and intersection capacity, sight distance, queuing, and crash history. A summary of results is provided below.

City of Medford

1. No study area intersections are under City of Medford jurisdiction, so none were evaluated operationally using City standards.

Jackson County

1. No study area intersections are under Jackson County jurisdiction, so none were evaluated operationally using County performance standards.
2. Charlotte Ann Road is a local street in the City of Medford maintained by Jackson County. The Jackson County TSP has a desired carrying capacity of 2,000 ADT for a local urban street. The potential traffic generated from MFR-20 zoning is estimated to increase traffic on Charlotte Ann Road from 1,110 ADT to 1,409 ADT under future year 2038 conditions, which is shown to be within the desired capacity.
3. Sight distance is shown to be adequate from Charlotte Ann Road.

ODOT

1. The intersection of Charlotte Ann Road / OR 99 is shown to meet mobility targets in the Oregon Highway Plan (OHP) under all analysis scenarios.
2. 95th percentile queue lengths are not shown to exceed available link distances or create safety concerns.
3. The study area intersection was not shown to have a crash rate exceeding the critical crash rate. One reported collision in July of 2019 involved a bicyclist that resulted in minor injury. The bicyclist was wearing dark clothing and was not visible to the driver. The collision was not due to any geometric or design flaws.

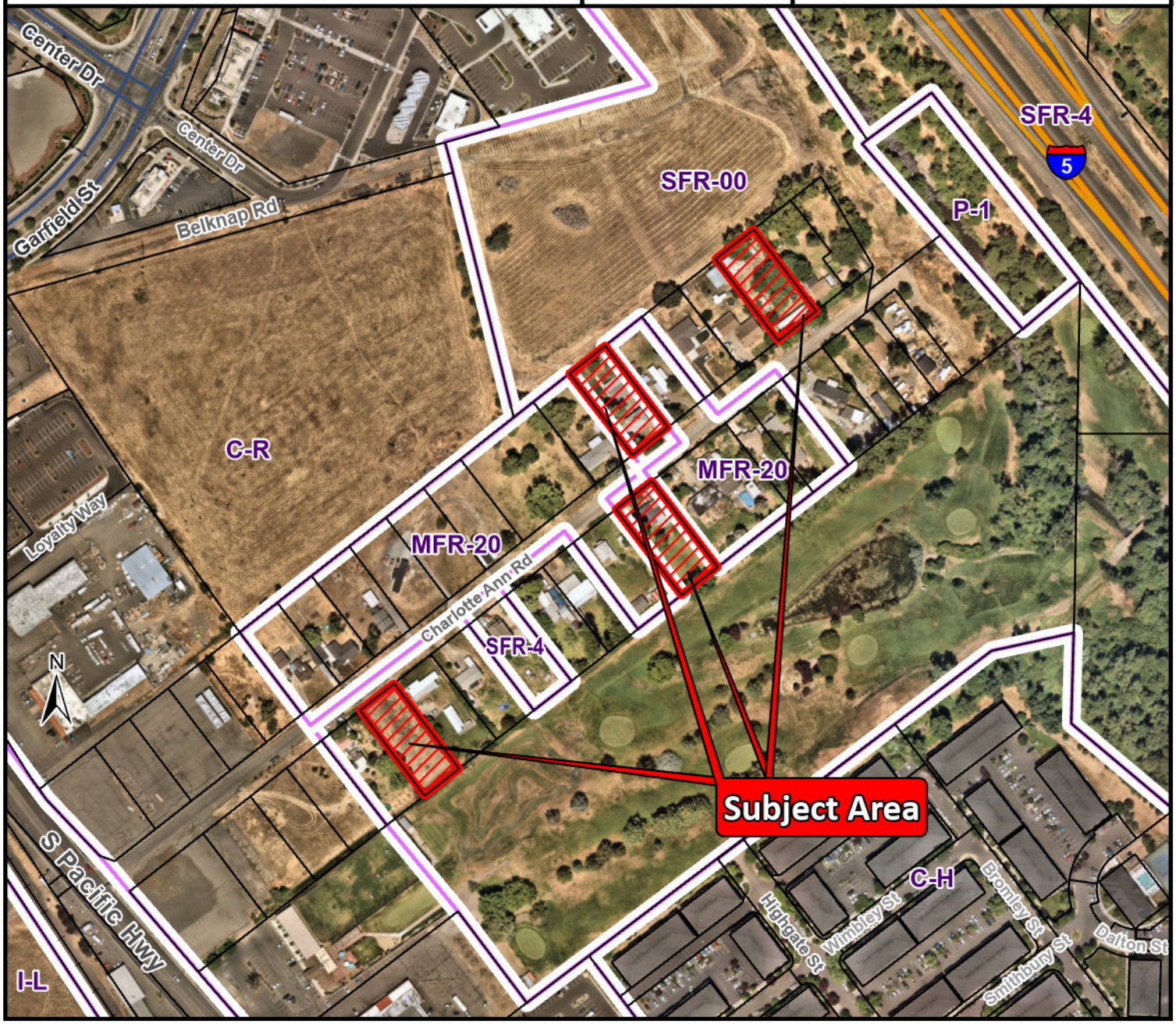
This analysis was undertaken to address issues of compliance with the City of Medford Comprehensive Plan, Land Development Code, and Oregon Transportation Planning Rule (TPR) in

Oregon Administrative Rules (OAR) Chapter 660, Division 012. The analysis was equally undertaken to address issues of compliance with the Jackson County Transportation System Plan (TSP) and Oregon Highway Plan (OHP). Based upon our analysis of streets and intersections within the study area, it is concluded that the proposed zone change can be approved without significantly affecting any existing or planned transportation facility under City of Medford, Jackson County, or ODOT jurisdiction.

MEDFORD
PLANNING

Vicinity Map

File Number:
ZC-25-006



Project Name:

City Initiated Zone Change - SFR-00 to MFR-20

Map/Taxlot:

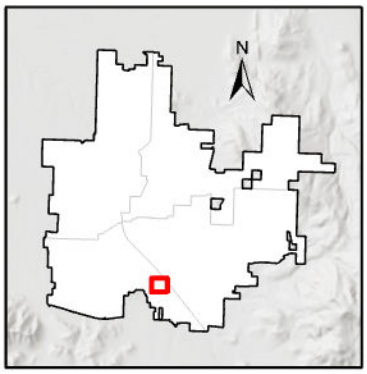
MAPLOT	FEEOWNER	ACRES
371W32C2000	CORNING DEBORAH	0.43
371W32C2201	PAAUWE JON H	0.43
371W32C3400	BROWN JACOB NATHANIEL TRUSTEE	0.44
371W32C4000	JOHNSON PATRICIA L/MICHAEL	0.45

0 125 250
Feet

Legend

- Subject Area
- Tax Lots
- Zoning Districts

Date: 1/13/2025



CITY OF MILWAUKIE

AGENDA

January 28, 2025

PLANNING COMMISSION

milwaukieoregon.gov

Hybrid Meeting Format: The Planning Commission will hold this meeting both in person at City Hall and through Zoom video. The public is invited to watch the meeting in person at City Hall, online through the City of Milwaukie YouTube page (https://www.youtube.com/channel/UCRFbfqe3OnDWLQKSB_m9cAw), or on Comcast Channel 30 within city limits.

If you wish to provide comments, the city encourages written comments via email at planning@milwaukieoregon.gov. Written comments should be submitted before the Planning Commission meeting begins to ensure that they can be provided to the Planning Commissioners ahead of time. To speak during the meeting, visit the meeting webpage (https://www.milwaukieoregon.gov/planning/planning-commission-2) and follow the Zoom webinar login instructions.

1.0 Call to Order – Procedural Matters — 6:30 PM

1.1 Native Lands Acknowledgment

2.0 Planning Commission Minutes – Motion Needed

2.1 January 14, 2025

3.0 Information Items

4.0 Audience Participation — This is an opportunity for the public to comment on any item not on the agenda

5.0 Hearing Items

5.1 HR-2024-002 - 1620 SE Waverly Dr (continuation)
Summary: Historic Resource Review (Type III)
Staff: Associate Planner Ryan Dyar

5.2 ZA-2024-002 - Oregon Senate Bill 1537
Summary: Proposed Code Amendments (Type V)
Staff: Senior Planner Vera Kolias

6.0 Community Involvement Advisory Committee (CIAC)

7.0 Planning Department Other Business/Updates

8.0 Forecast for Future Meetings

February 11, 2025	1. Hearing Item:	No items at this time
February 25, 2025	1. Hearing Item:	No items at this time.
	2. Work Session Item:	Transportation System Plan Update

Milwaukie Planning Commission Statement

The Planning Commission serves as an advisory body to, and a resource for, the City Council in land use matters. In this capacity, the mission of the Planning Commission is to articulate the Community's values and commitment to socially and environmentally responsible uses of its resources as reflected in the Comprehensive Plan.

1. **PROCEDURAL MATTERS.** If you wish to register to provide spoken comment at this meeting or for background information on agenda items please send an email to planning@milwaukieoregon.gov.
2. **PLANNING COMMISSION and CITY COUNCIL MINUTES.** City Council and Planning Commission minutes can be found on the City website at www.milwaukieoregon.gov/meetings.
3. **FORECAST FOR FUTURE MEETINGS.** These items are tentatively scheduled but may be rescheduled prior to the meeting date. Please contact staff with any questions you may have.
4. **TIME LIMIT POLICY.** The Commission intends to end each meeting by 10:00pm. The Planning Commission will pause discussion of agenda items at 9:45pm to discuss whether to continue an agenda item to a future date or finish the item.

Public Hearing Procedure

Those who wish to testify should attend the Zoom meeting posted on the city website, state their name and city of residence for the record, and remain available until the Chairperson has asked if there are any questions from the Commissioners. Speakers are asked to submit their contact information to staff via email so they may establish standing.

1. **STAFF REPORT.** Each hearing starts with a brief review of the staff report by staff. The report lists the criteria for the land use action being considered, as well as a recommended decision with reasons for that recommendation.
2. **CORRESPONDENCE.** Staff will report any verbal or written correspondence that has been received since the Commission was presented with its meeting packet.
3. **APPLICANT'S PRESENTATION.**
4. **PUBLIC TESTIMONY.** Comments or questions from interested persons and testimony from those in support or opposition of the application.
5. **QUESTIONS FROM COMMISSIONERS.** The commission will have the opportunity to ask for clarification from staff, the applicant, or those who have already testified.
6. **REBUTTAL TESTIMONY FROM APPLICANT.** After all public testimony, the commission will take rebuttal testimony from the applicant.
7. **CLOSING OF PUBLIC HEARING.** The Chairperson will close the public portion of the hearing. The Commission will then enter into deliberation. From this point in the hearing the Commission will not receive any additional testimony from the audience but may ask questions of anyone who has testified.
8. **COMMISSION DISCUSSION AND ACTION.** It is the Commission's intention to make a decision this evening on each issue on the agenda. Planning Commission decisions may be appealed to the City Council. If you wish to appeal a decision, please contact the Planning Department for information on the procedures and fees involved.
9. **MEETING CONTINUANCE.** Prior to the close of the first public hearing, *any person* may request an opportunity to present additional information at another time. If there is such a request, the Planning Commission will either continue the public hearing to a date certain or leave the record open for at least seven days for additional written evidence, argument, or testimony. The Planning Commission may ask the applicant to consider granting an extension of the 120-day time period for making a decision if a delay in making a decision could impact the ability of the City to take final action on the application, including resolution of all local appeals.

Meeting Accessibility Services and Americans with Disabilities Act (ADA) Notice

The city is committed to providing equal access to public meetings. To request listening and mobility assistance services contact the Office of the City Recorder at least 48 hours before the meeting by email at ocr@milwaukieoregon.gov or phone at 503-786-7502. To request Spanish language translation services email espanol@milwaukieoregon.gov at least 48 hours before the meeting. Staff will do their best to respond in a timely manner and to accommodate requests. Most Council meetings are broadcast live on the city's YouTube channel and Comcast Channel 30 in city limits.

Servicios de Accesibilidad para Reuniones y Aviso de la Ley de Estadounidenses con Discapacidades (ADA)

La ciudad se compromete a proporcionar igualdad de acceso para reuniones públicas. Para solicitar servicios de asistencia auditiva y de movilidad, favor de comunicarse a la Oficina del Registro de la Ciudad con un mínimo de 48 horas antes de la reunión por correo electrónico a ocr@milwaukieoregon.gov o llame al 503-786-7502. Para solicitar servicios de traducción al español, envíe un correo electrónico a espanol@milwaukieoregon.gov al menos 48 horas antes de la reunión. El personal hará todo lo posible para responder de manera oportuna y atender las solicitudes. La mayoría de las reuniones del Consejo de la Ciudad se transmiten en vivo en el canal de YouTube de la ciudad y el Canal 30 de Comcast dentro de los límites de la ciudad.

Milwaukie Planning Commission:
Jacob Sherman, Chair
Joseph Edge, Vice Chair
Ernestina Fuenmayor
Leese Gratreak
Max Penneck

Planning Department Staff:
Laura Weigel, Planning Manager
Brett Kelver, Senior Planner
Vera Kolias, Senior Planner
Adam Heroux, Associate Planner
Ryan Dyar, Associate Planner
Petra Johnson, Administrative Specialist II

CITY OF MILWAUKIE

PLANNING COMMISSION MINUTES

City Hall Council Chambers
10501 SE Main Street
www.milwaukieoregon.gov

January 14, 2025

Present: Jacob Sherman, Chair
Joseph Edge, Vice Chair
Tina Fuenmayor
Leesa Gratreak
Max Penneck

Staff: Justin Gericke, City Attorney
Brett Kelver, Senior Planner
Laura Weigel, Planning Manager

Absent:

(00:11:30)
1.0 Call to Order — Procedural Matters*
Chair Sherman called the meeting to order at 6:30 p.m., read the conduct of meeting format into the record, and Native Lands Acknowledgment.

***Note**: The information presented constitutes summarized minutes only. The meeting video is available by clicking the Video link at http://www.milwaukieoregon.gov/meetings.*

(00:12:24)
2.0 Planning Commission Minutes
The December 10, 2024, minutes were approved as presented.

(00:13:09)
3.0 Information Items
Planning Manager, Laura Weigel let the public know that the city is currently recruiting seats on the Planning Commission and that City Council is in the process of setting their goals which is guided by public input shared via the website "Engage Milwaukie".

(00:15:22)
4.0 Audience Participation
No information was presented for this portion of the meeting.

(00:16:04)
5.0 Hearing Item

(00:16:12)
5.1 ZA-2024-003-Title 18 Code Amendments
Senior Planner, Brett Kelver, announced the applicable sections of the Milwaukie Municipal Code (MMC): MMC 19.902, MMC 19.1008. **Kelver** presented the staff report via a power point presentation. Both are included in the meeting packet.

Chair Sherman asked clarifying questions regarding the riparian buffer zone (RBZ), the RBZ fringe measurement standards, and the impact Title 18 will have on current development projects that exist in the flood hazard zones. **Vice Chair Edge** asked about the insurance implications if the standards were not adopted. **City Attorney, Justin Gericke,** commented that Council direction is to not drop out of the National Flood Insurance Program. **Edge** and **Kelver** clarified that the standards must be adopted as they are to remain eligible for the program. **Milwaukie resident, Jeremy Wood,** asked clarifying questions regarding the flood plain map and RBZ.

Chair Sherman closed the public testimony.

Commission Discussion:
Edge provided a brief history on the program's inception and thanked staff for their work. **Chair Sherman** commented on the importance of affordable flood insurance. The commission spoke in support of approving the application. **Edge** motioned to approve ZA-2024-003 as presented. **Commissioner Gratreak** seconded the motion. The motion was passed with a 5-0 vote.

(00:54:14)
6.0 Community Involvement Advisory Committee (CIAC)
No information was presented for this portion of the meeting.

(00:55:13)
7.0 Planning Department/Planning Commission Other Business/Updates
Chair Sherman discussed the joint meeting with City Council regarding meeting lengths and attendance expectations. **Gratreak** commented on the efficiency and length of meetings. **Commissioner Fuenmayor** spoke about the impact long meetings have on families and other life commitments. **Chair Sherman** spoke in favor of less meetings for longer durations. **Edge** commented on some of the reasons that meetings go long and offered compromise to support commissioner's individual needs. **Gratreak** commented on the ability to plan around meetings and meeting length expectations. **Weigel** discussed ways to move forward and manage meeting expectations through navigating deadlines and application types. **Fuenmayor** expressed preference for shorter meetings more often. **Chair Sherman** commented on continuing the conversation and discussed attendance expectations based on the agenda items.

(01:18:27)

8.0 Forecast for Future Meetings

January 28, 2025	Hearing Items:	HR-2024-002 Continuation SB1537 Code Amendments
February 11, 2025	No items at this time	
February 25, 2025	Work Session Item:	Transportation System Plan Update

Meeting adjourned at approximately 7:45 p.m.

Respectfully submitted,

Petra Johnson, Administrative Specialist II

CITY OF **MILWAUKIE**

To: Planning Commission

Through: Laura Weigel, Planning Manager

From: Ryan Dyar, Associate Planner

Date: January 17, 2025, for January 28, 2025, Public Meeting

Subject: **File:** HR-2024-002
Applicant: Troy Fowler, Fowler Home + Design
Owner(s): Mark Eklund
Address: 1620 SE Waverly Drive
Legal Description (Map & Tax Lot): 1S1E26DB00300
NDA: Historic Milwaukie

ACTION REQUESTED

On December 10th, 2024, the Planning Commission opened the public hearing for land use file #HR-2024-002. At the request of the applicant, the Planning Commission agreed to continue the public hearing to January 28, 2025, to allow for modifications to be made to the application. Those modifications were submitted to the city on December 20th, 2024 (Attachment 7). As discussed at the initial public hearing, the Planning Division does not have in-house staff with historic preservation expertise, so the city contracted with Peter Meijer Architecture firm, which specializes in historic architecture, to assist staff in the review of this application. On January 6th, 2025, the city's historic preservation consultant provided an updated review of the applicant's revisions (Attachment 8). The review provided recommendations for more complete compliance with multiple criteria. Therefore, as the proposal does not currently meet the criteria, staff recommend denial of the application and have provided Findings in Support of Denial in Attachment 1.

The public record officially closed on January 6th, 2025. The applicant intends to request that the Planning Commission reopen the public record so that new evidence—in the form of a revised plan set—can be submitted into the record.

Historic resources review, unlike other Type III reviews, is highly subjective and discretionary. Staff and the consultant recognize that this is a private residence, and structures need to evolve over time for both modern use and code compliance; applications like this one are unique. Therefore, a failure to fully meet all the approval criteria might not necessarily result in an outright denial of the proposal.

BACKGROUND INFORMATION

A. Site and Vicinity

The site address is 1620 SE Waverly Dr. The property is developed with a single detached structure, a carport, and landscaped garden areas. The surrounding area includes single detached dwellings and a golf course to the north across Waverly Dr (see Figure 1).



Figure 1. Site and vicinity



Figure 2.Primary (north) elevation (Zillow)

B. Zoning Designation

The site is in the Moderate Density Residential (R-MD) zone with a Historic Resources Overlay (HP) zoning designation.

C. Comprehensive Plan Designation

Moderate Density

D. Land Use History

- **1989**: The property was identified as a "Significant" historic resource and was placed and city's historic resource inventory. Attachment 6 contains the 1988 Cultural Resource Inventory (1988 Inventory) documentation for the subject property.

E. Proposal

The proposed work includes the addition of a primary wing on the east side of the residence, the addition of a 306 sq ft prefabricated conservatory at the southwest side of the residence, extending the west garage wall 6 feet, and extending the south kitchen and nook walls 8.5 ft and 6 ft respectively. A lanai and porch are proposed for the northwest corner of the house. The proposal no longer includes extending the primary entrance column on the north elevation. Instead, the plans submitted on December 20th, 2024, show the primary entrance column remaining flush with the north elevation.

On the second floor, wall extensions are proposed on the east wall at the existing bath, the south wall, and west wall. Decks are proposed to the northwest and south. The roof of the main body of the house will remain at the same height as today. Other proposed roofs maintain the existing roof slopes and do not exceed the existing maximum height.

The northern elevation (street-facing façade) is proposed to retain some of the original building design. Changes include the removal of entryways, redesigning and relocating replacement windows, and redesigning the pediments above the second-floor windows on the west wing.

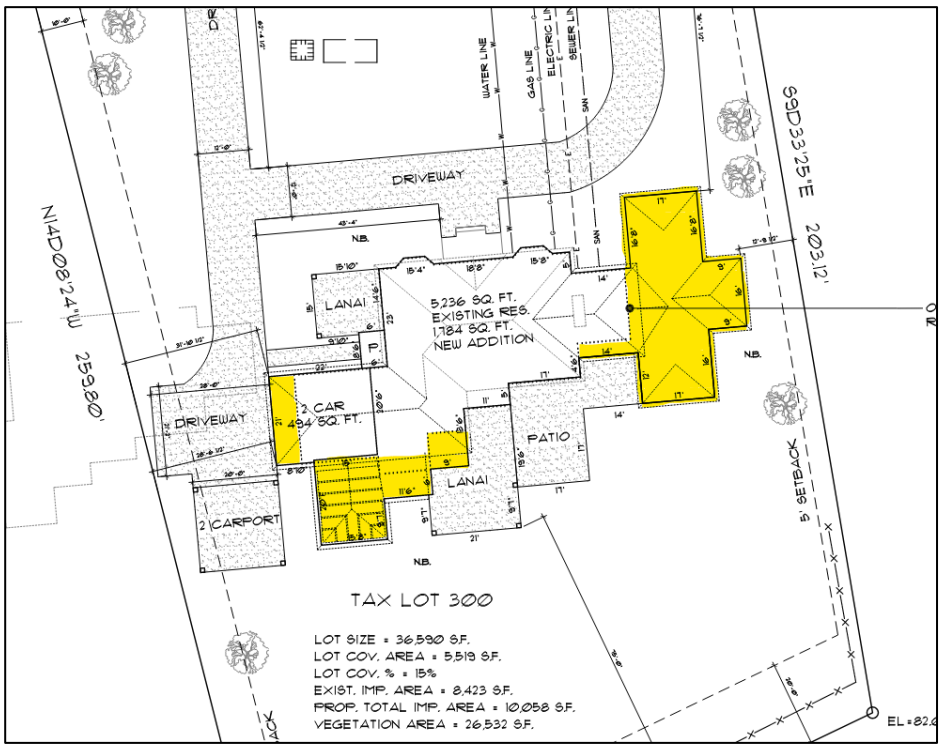


Figure 3. Site plan showing location of proposed footprint expansion (highlighted). Expansion also includes the addition of two lanais (not highlighted but labeled).



Figure 4. North elevation showing existing façade (bottom) and proposed modifications (top).



Figure 5. South elevation showing existing facade (bottom) and proposed modifications (top).

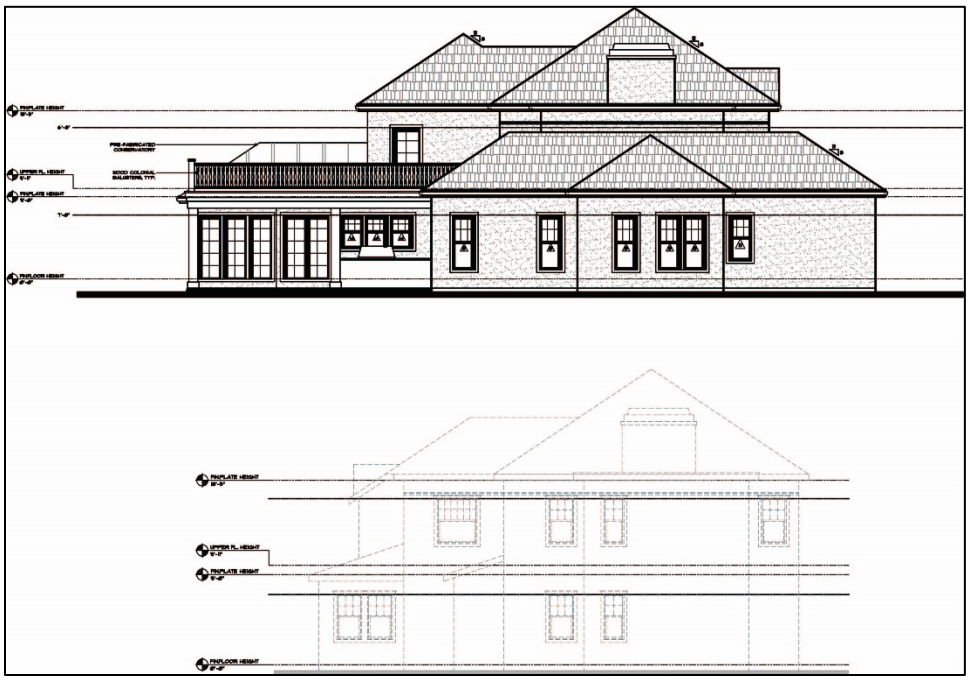


Figure 6. East elevation showing existing facade (bottom) and proposed modifications, including new east wing, lanai, and conservatory (top).



Figure 7. West elevation. Showing existing (bottom) and new garage entrance, lanai, window changes, and conservatory (top).

The project requires approval of the following applications:

1. HR-2024-002: Type III Historic Resource review (exterior alteration of a landmark)

ANALYSIS

MMC 19.403 provides regulatory language for review of alterations to listed historic resources, including a purpose section and approval criteria. The approval criteria are deliberately discretionary to allow for opportunities for changes to historic resources while still preserving key architectural elements and maintaining complementary design and visual integrity.

1988 Cultural Resources Inventory

The Milwaukie Historic Resources Inventory is adopted as part of the city's Comprehensive Plan and consists of two different types of historic resources designations within the city – significant and contributing. Historic resources that are designated as significant require the highest level of review. There are 16 properties in the city that are designated as significant. The historic resources listed in the inventory were given scores to determine their significance. Scoring occurred in the late 1980's based on a list of criteria that include person/group/organization affiliated with the property, event associated with the property, pattern, style/building type/convention, design/artistic quality, material construction, integrity, rarity, landmark, setting, and continuity. To be designated as "significant," an historic resource must receive a rating score level of 60 or greater on the evaluation worksheet and be at least 50 years old or score a high of 10 in at least two of the categories of the evaluation worksheet or be listed on the National Register of Historic Places.

Built in 1922, the house is not listed on the National Register of Historic Places and received a total score of 54, less than the required score of 60. However, the rating of "Significant" was determined because it received a full score (10/10) in the following two categories:

1. **Person/Group/Organization:** It received full marks in this category because of its association with William and Annie MacMaster. William was a successful financial and real estate businessman and was active in community affairs. He was the president of various Portland-Area civic organizations and a local and state booster. Annie was responsible for women's war work throughout the Pacific Northwest for the YMCA during World War I. According to the 1988 Inventory, the MacMasters were notably one of the first families to reside permanently in Waverly. This estate, known as Ravenswood, was the second built for the MacMaster's in Waverly. The first, known as Ardgour, was torn town in 1937.
2. **Style/Building Type/Convention:** The house received full marks as the best example of colonial revival architecture in Milwaukie. The 1988 Historic Resource Survey determined the following as notable character-defining features of the home:
    - Primary entrance with paired paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters.
    - Stucco exterior cladding
    - Quoining, also made of stucco

- Polygonal bays
- End wall Chimney
- Palladian window
- Full-height polygonal bay window with tent roof and spandrel
- Belt course above heads of second story windows
- Rectangular plan glanced by two smaller wings on side elevations

Key Question

Staff have identified the following question for the Commission's deliberation. Aspects of the proposal and approval criteria not listed below are addressed in the Findings in Support of Denial (see Attachment 1) and generally require less analysis and discretion. The contracted architect provided review comments on the original application submittal, the information the applicant submitted in response to the first review, and the amendments submitted on December 20th, 2024 (see Attachments).

Staff recognize that this is a private residence and that there's a need for structures to evolve over time to meet updated building and energy codes and accommodate the needs of their occupants. However, the scale and extent of the proposed changes remains a clear concern for the city's consultant. The concerns are discussed in more detail below, along with the applicant's response to the approval criteria, and the consultant's recommendation for how the criteria can be met.

The following analysis includes review of select approval criteria for exterior alterations to a historic resource.

A. Is the proposal consistent with the visual integrity or style of the home, including building height, horizontal additions, and windows?

The applicant is proposing modifications to the house to create a more efficient and safer residence through better insulation, higher performance windows, and seismic fortification of the structure. As discussed, the proposed work includes the addition of a primary wing on the east side of the residence, the addition of a prefabricated conservatory at the southwest side of the residence, extensive window replacement and redesign, increasing the roof height on the west wing, wall extensions on to the south, west, and the addition of a lanai on the north and south elevations.

Retention of Original Construction

This criterion states that distinguishing qualities defining a resources character shall not be destroyed and that removal or alteration of historic materials shall be avoided. The proposal involves redesigning various aspects of the street facing façade, including removing entryways, altering window designs, and altering the design of the character-defining pediments above the second story windows mentioned in the 1988 inventory.

To meet this criterion, the city's consultant recommends that the character-defining qualities of the entire primary, north, elevation remain as they currently exist. They recommend that the entries and window size and design should match the historic; this includes the pediments above the second story windows on the west wing.

Building Height Criterion

The building height criterion states that existing building heights and pitches should be maintained. The applicant is not proposing a new foundation or to raise or lower the building's permanent maximum height. The proposal does involve raising the height of the west wing of the home and adding two pediments on the second floor of the west wing that alter the roof's design. Despite some inconsistencies in the plan set, the applicant proposes retaining the flat roof on the east wing and above the two-story bay windows on the main block.

The applicant's statement argues that the tallest roof form will remain—thus maintaining existing building's highest elevation—and that the existing roof pitches will be retained.

The city's consultant recommends the following be maintained to meet the criteria. As indicated below, the proposal is consistent with some but not all these recommendations.

- Ensure the retention of the flat roof on the existing east wing of the home *(consistent with proposal).*
- Ensure the retention of historic design and composition of the two existing pediments above windows on the west wing of the home ***(inconsistent with proposal)***.
- Ensure that the proposed addition and extension of walls at the garage, kitchen and kitchen nook, and east wing will not alter the pitch of the roof to which they are attached *(consistent with proposal*).

Horizontal Additions

The criterion allows for horizontal additions on historic structures so long as the scale and proportion of building additions, including the relationship of windows to walls, are visually compatible with the traditional architectural character of the historic building.

As noted, the applicant is proposing a significant east wing addition, the addition of a conservatory on the south elevation, and wall extensions on the south, west, and east elevations. The applicant states that these additions and wall extensions are visually consistent with the historic structure and that the criterion is therefore satisfied. The city's consultant largely agrees but is concerned about how the proposed east wing connects with the existing structure. To meet the criterion, the consultant proposes shifting the new east wing where the addition connects with the existing structure to avoid obscuring the primary block of the historic home.

Windows

Except for the Palladian windows on the southern and northern elevations, the applicant proposes replacing all the windows on every elevation. Window replacement is allowed under the MMC so long as the replacements match the originals as closely as possible.

The applicant does propose retaining the size and appearance of the windows specifically mentioned in the 1988 Inventory. On the northern elevation, the applicant is proposing to move but reuse the Palladian window. They are also proposing to replace the glass but retain the size and appearance of the single-story bay and full-height polygonal bay windows. Many other window designs on the northern elevation, however, are proposed to change.

The applicant's statement notes that the frame size and grilles will match the original windows; however, they fail to justify other proposed modifications.

To meet this criterion, the city's consultant recommends that the window replacements match the visual qualities and design of the historic windows on the north elevation. On the first floor of the west wing, they propose retaining the existing entryway. On the second floor of the west wing, they recommend retaining the historic design and composition of the two windows and existing pediments above the windows. On the first floor of the existing east wing, they recommend retaining the existing entryway.

CONCLUSIONS

Staff recommendation to the Planning Commission:

Based solely on the approval criteria staff recommend that the Commission deny the application. However, staff and the consultant recognize that this is a private residence, and structures need to evolve over time for both modern use and code compliance; applications like this one are unique. Therefore, a failure to fully meet all the approval criteria or comply with every consultant recommendation might not necessarily result in an outright denial of the proposal.

CODE AUTHORITY AND DECISION-MAKING PROCESS

The proposal is subject to the following provisions of the Milwaukie Municipal Code (MMC).

- MMC 19.301 Moderate Density Residential Zone
- MMC 19.403 Historic Preservation Overlay
- MMC 19.1006 Type III Review

This application is subject to Type III review, which requires the Planning Commission to consider whether the applicant has demonstrated compliance with the code sections shown above. In Type III reviews, the Commission assesses the application against review criteria and development standards and evaluates testimony and evidence received at the public meeting.

The Commission has 4 decision-making options as follows:

A. Approve the application subject to the recommended Findings.

B. Approve the application with modified Findings and Conditions of Approval. Such modifications need to be read into the record.

C. Deny the application upon finding that it does not meet approval criteria. Such findings need to be read into the record.

D. Continue the hearing.

The applicant has waived the 120-day processing time specified in Subsection 19.1001.7.C.

COMMENTS

Notice of the proposed changes was provided to the following agencies and people prior to the initial public hearing: City of Milwaukie Engineering, Building, and Public Works Departments, Community Development, NDA Program Manager, City Attorney, Oregon State Historic Preservation Office, and the Historic Milwaukie Neighborhood District Association (NDA). Notice was also sent to all properties within 300 ft of the site.

ATTACHMENTS

Attachments are provided as indicated by the checked boxes. All material is available for viewing upon request.

	Early PC Mailing	PC Packet	Public Copies	Packet
1. Recommended Findings in Support of Denial	☐	☒	☐	☒
2. Applicant's Narrative and Supporting Documentation received September 3, 2024				
a. Narrative	☒	☐	☒	☒
b. Site Plan	☒	☐	☒	☒
c. Construction Drawings	☒	☐	☒	☒
3. Consultant review dated October 1, 2024	☒	☒	☒	☒
4. Applicant's supplemental information received November 7, 2024	☒	☒	☒	☒
5. Consultant second review dated November 14, 2024	☒	☒	☒	☒
6. Historic Resource Inventory Listing, 1988	☒	☒	☒	☒
7. Applicant's updated materials received December 20, 2024	☐	☒	☒	☒
8. Consultant third review dated January 6, 2025	☐	☒	☒	☒

Key:
Early PC Mailing = materials provided to PC at the time of application public notice.
PC Packet = materials provided to PC 7 days prior to the hearing.
Public Copies = paper copies of the packet available for review at City facilities and at the PC meeting.
Packet = packet materials available online at https://www.milwaukieoregon.gov/bc-pc/planning-commission-65.

ATTACHMENT 1
Findings in Support of Denial
Primary File #HR-2024-002; 1620 SE Waverly Dr historic review

Sections of the Milwaukie Municipal Code not addressed in these findings are found to be inapplicable to the decision on this application.

1. The applicant's representative, Troy Fowler, has applied on behalf of Mark Eklund (owner) for approval to alter the historic structure at 1620 Waverly Dr. The base zone for this site is Moderate Density Residential (R-MD) and the site contains a Historic Preservation Overlay zoning designation. The primary land use application file number is HR-2024-002.

2. The proposed work includes the addition of a primary wing on the east side of the residence, the addition of a 306 sq ft prefabricated conservatory at the southwest side of the residence, extending the west garage wall 6 ft, and extending the south kitchen and nook walks 8.5 ft and 6 ft respectively. A lanai and porch are proposed for the northwest corner of the house.

   On the second floor, wall extensions are proposed on the east wall at the existing bath, the south wall, and west wall. Decks are proposed to the northwest and south. The roof of the main body of the house will remain at the same height as today. Other proposed roofs maintain the existing roof slopes and do not exceed the existing maximum height.

   The street-facing façade is proposed to retain some of the original building design. Changes include: the design of some replacement windows; the design of the pediments above the second-floor windows on the west wing, the removal of entries on the west and east wings.

3. The proposal is subject to the following provisions of the Milwaukie Municipal Code (MMC):
   - MMC 19.301 Moderate Density Residential Zone
   - MMC 19.403 Historic Preservation Overlay
   - MMC 19.1006 Type III Review

   The application has been processed and public notice provided in accordance with MMC Section 19.1006 Type III Review. The initial public hearing public hearing was held on December 10, 2024, as required by law The public hearing was continued to January 28, 2025.

4. MMC 19.301 Moderate Density Residential Zone

   a. MMC 19.301.3 Uses

   MMC Table 19.304.3 establishes the uses that are allowed in the Moderate Density Residential Zone (R-MD)

   The property is the site of a single detached dwelling, which is a permitted use in the R-MD zone.

This standard is met.

b. MMC 19.301.4 Development Standards

MMC 19.301.4 establishes standards for new development in the R-MD zone.

Table 1 provides the applicable standards for development in the R-MD zone.

Table 1
Lot and Development Standards

Standard	R-MD Requirement	Existing	Proposed
Min/max lot size	5,000+ sq ft (for single detached dwelling)	36,590 sq ft	36,590 sq ft
Front yard	20 ft (for lots ≥ 7,000 sq ft)	86.6 ft	76.6 ft
Side yard(s)	5 ft/10ft (for lots ≥ 7,000 sq ft)	34.5 ft/40 ft	28.5 ft/12.7ft
Rear yard	20 ft (for lots ≥ 7,000 sq ft)	10 ft	10 ft
Maximum Height	35 ft	31ft (Max Peak)	31ft (Max Peak)
Maximum Lot Coverage*	30% = 10,977 sq ft (for lots ≥ 7,000 sq ft)	2,328 sq ft (6%)	5,057 sq ft (13%)
Minimum Vegetation	30% = 10,977 sq ft (for lots ≥ 7,000 sq ft)	28,167 sq ft (76%)	26,532 sq ft (72%)

*Note: these numbers are different from what's shown on the applicant's site plan. This is because lot coverage per the MCC does not equate to impervious surface or building floor area. See MMC 19.201 for lot coverage definition.

The Planning Commission finds that the proposal meets all applicable development standards of MMC 19.301.

5. MMC 19.403 Historic Preservation Overlay

MMC 19.403 provides standards and procedures for review of applications related to identified historic resources.

The subject property is identified on the city's historic and cultural resources inventory as a "Significant" historic resource; therefore, the regulations in MMC 19.403 apply.

a. MMC 19.403.5 Alteration and Development

(1) MMC 19.403.5.A requires review for any exterior alteration of a landmark deemed "Significant" in the City historic inventory.

The subject property is designated as a "Significant" historic resource, and the proposed improvements are for exterior alterations, including modifications to character defining features described in the city's 1988 Historic Resource Inventory (1988 Inventory) on the north elevation, a new east wing, a new conservatory to the south, and more minor footprint expansions to the west. The proposed improvements are subject to be reviewed under the provisions of MMC 19.403.

(2) MMC 19.403.5.B requires that an application for exterior alteration of a landmark be submitted to the Planning Director, in such form and detail as prescribed by the Director. Applications that do not meet the requirements for projects subject to administrative approval as per MMC 19.403.5.C shall follow the Type III review process outlined in MMC 19.1006.

An application with sufficient detail has been submitted for Type III review. This standard is met.

(3) MMC 19.403.5.D provides for approval of alteration requests that do not qualify for administrative approval.

As described above, the proposal is to modify character defining features described in the 1988 historic resource survey and expand the house in all directions.

Because these modifications do not meet the standards for administrative approval, the application has been combined under a Type III review, per MMC 19.1006.

(4) MMC 19.403.5.E establishes approval criteria for alterations to landmarks.

The proposed improvements have been evaluated against the relevant approval criteria as follows:

(a) Retention of Original Construction

Distinguishing original qualities defining a resource's character shall not be destroyed. Removal or alteration of historic materials or distinctive architectural features should be avoided when possible.

The applicant proposes redesigning various aspects of the north (street-facing) elevation identified as being significant in the 1988 Inventory.

The applicant has proposed replacing various windows and doors on the north elevation, including modifying the design of the west wing's second story character-defining pediments. These modifications go beyond material replacement due to deterioration or energy inefficiency and instead alter the design.

This criterion is not met.

(b) Building Height

Existing building heights should be maintained. Alteration of roof pitches shall be avoided. Raising or lowering a building's permanent elevation when constructing a foundation shall be avoided, except as required by building code or floodplain development permit.

The applicant is not proposing a new foundation or to raise or lower the building's permanent elevation. However, the applicant is proposing to make roof alterations on the west wing of the home. These modifications would raise the height of the west wing.

Lastly, there is a discrepancy in the plan set regarding the design of the home's existing eastern wing However, staff understand—based on the application statement—that the applicant intends to retain the flat roof on the exiting east wing of the home and above the two-story bay window on the northern elevation. A condition of approval can be added to ensure the applicant provides an updated plan set for the building permit that retains these flat roofs.

This criterion is not met.

(c) Horizontal Additions
The scale and proportion of building additions, including the relationship of windows to walls, shall be visually compatible with the traditional architectural character of the historic building. Contemporary design for alterations and additions is acceptable if the design respects the building's original design and is compatible with the original scale, materials, and window and door-opening proportions of the building.

The applicant has proposed building extensions to the east, west, and south that are visually compatible with the traditional architectural characteristics of the historic building. The additions and alterations utilize stucco cladding or a stucco-like finishing material to match the exiting exterior finish, and the overall scale and design of windows and doors on these elevations respect the building's original Colonial Revival design.

The proposed eastern wing slightly obscures the historic home from the right-of-way, which detracts from the architectural character of the historic building.

This criterion is not met.

(d) Windows
Window replacements shall match the visual qualities of original windows as closely as possible. Wood window frames are preferred in meeting this standard. However, if non-wood replacements exhibit similar visual qualities as their wooden counterparts, they may be acceptable. The original number of windowpanes shall be maintained or restored when replacements are required.

Except for the Palladian windows on the northern and southern elevations, the applicant has proposed replacing all the windows on the house. On the main block (northern elevation), the applicant is proposing to retain the size and appearance of the single-story bay window with the tent roof and the full height poloidal bay windows; this is notable because these features are called out in the 1988 Inventory. However, the windows on the east and west wings—on both the first

and second floor of the northern elevation—are proposed to be replaced with windows that do not match the visual qualities of the original. While lower priority, window replacements on the east, west, and south elevations also do not match the visual qualities of the original.

This criterion is not met.

(e) Restoration Possible

Except where building code precludes it, new additions or alteration to buildings shall be done in such a manner that if such additions or alterations were to be removed in the future, the essential form and integrity of the original building could be restored.
The proposed alterations are wood frame construction. While unlikely, in theory, the various expansions and additions could be removed in the future and the original form of the building could be restored.

This criterion is met.

(f) Signs and Lighting

Signs, lighting, and other appurtenances (such as walls, fences, awnings, and landscaping) shall be visually compatible with the original character of the building.
There is no proposed signage. The existing northern elevation contains a single lantern-style fixture above the primary entrance. The applicant has not shown this light or indicated whether it will be reused in construction. The plans do not show any other or lighting or appurtenances; however, the applicant indicates in their application statement that all proposed lighting and appurtenances will be visually compatible with the original character of the building.

This criterion is met.

(g) Time Period Consistency

Buildings shall be recognized as products of their own time. Alterations that have no Historical basis or which seek to create an earlier appearance shall be avoided.

The proposed alterations that are approvable per the approval criteria, including the east wing, the conservatory, the kitchen extension, kitchen nook extension, and garage extension—are consistent with the Colonial Revival architectural style. No proposed changes create a false historical basis or earlier appearance.

This criterion is met.

(h) Visual Integrity/Style

Distinctive stylistic features, such as a line of columns, piers, spandrels, or other primary structural elements, or examples of skilled craftsmanship

which characterize a building, shall be maintained or restored as far as is practicable.

As discussed under Criterion 1: Retention of Original Construction, the applicant is proposing to make major modifications to various entries and windows on the northern elevation, some of which are high-preservation-priority architectural features identified in the 1988 Inventory.

This criterion is not met.

(i) Replacement or Additional Materials

Whenever possible, deteriorated architectural features shall be repaired rather than replaced. In the event replacement of an existing feature is necessary, or an addition is proposed, new materials should match those of the original building, to the extent possible, in composition, design, color texture, and other visual qualities.

While the proposed additions and expansions match the style of the original building, as discussed above, the applicant is proposing to make major changes to high-preservation priority features and replace nearly all the windows in the house, many of which are visually inconsistent with the originals.

As proposed, this criterion is not met.

(j) Buffering

An appropriate buffer or screen, as provided under Subsection 19.504.6, may be required when a new commercial or industrial improvement or use is proposed on or adjacent to a designated resource, or within or adjacent to an historic district.

No new commercial or industrial improvement or use is proposed on a designated resource.

This criterion is not applicable.

The proposed improvements do not meet the applicable standards of MMC 19.403.

6. The application was referred to the following departments and agencies on October 3, 2024:
   - Milwaukie Building Division
   - Milwaukie Community Development Department
   - Milwaukie City Attorney
   - Milwaukie Neighborhood District Association Program Manger
   - State of Orgon Parks and Recreation (State Historic Preservation Office)
   - Milwaukie Engineering Department
   - Milwaukie Public Works Department

- Historic Milwaukie Neighborhood District Association Chairperson and Land Use Committee

7. Notices were sent to all properties within 300 ft of the subject property on November 20, 2024. No comments were provided.

MILWAUKIE PLANNING
10501 SE Main St.
Milwaukie OR 97222
503-786-7630
planning@milwaukieoregon.gov

Application for Land Use Action

Primary File #: HR-2024-002

Review type*: ☐ I ☐ II ☒ III ☐ IV ☐ V

CHECK ALL APPLICATION TYPES THAT APPLY:

- ☐ Amendment to Maps and/or
  - ☐ Comprehensive Plan Map Amendment
  - ☐ Zoning Text Amendment
  - ☐ Zoning Map Amendment
- ☐ Code Interpretation
- ☐ Community Service Use
- ☐ Conditional Use
- ☐ Development Review
- ☐ Director Determination
- ☐ Downtown Design Review
- ☐ Extension to Expiring Approval
- ☐ Historic Resource:
  - ☒ Alteration
  - ☐ Demolition
  - ☐ Status Designation
  - ☐ Status Deletion
- ☐ Land Division:
  - ☐ Final Plat
  - ☐ Lot Consolidation
  - ☐ Partition
  - ☐ Property Line Adjustment
  - ☐ Replat
  - ☐ Subdivision
- ☐ Mixed Use Overlay Review
- ☐ Modification to Existing Approval
- ☐ Natural Resource Review**
- ☐ Nonconforming Use Alteration
- ☐ Parking:
  - ☐ Quantity Determination
  - ☐ Quantity Modification
  - ☐ Shared Parking
  - ☐ Structured Parking
- ☐ Planned Development
- ☐ Residential Dwelling
  - ☐ Manufactured Dwelling Park
  - ☐ Manufactured Dwelling
  - ☐ Temporary Dwelling Unit
- ☐ Transportation Facilities Review**
- ☐ Variance:
- ☐ Use Exception
  - ☐ Variance
  - ☐ Willamette Greenway Review
- ☐ Other: _____

Use separate application forms for:
Annexation and/or Boundary Change
- Compensation for Reduction in Property Value (Measure 37)
- Daily Display Sign
- Appeal

RESPONSIBLE PARTIES:

APPLICANT (owner or other eligible applicant—see reverse): Mark Eklund

Mailing address: 1322 SE Lexington St., Portland State/Zip: OR, 97202

Phone(s): 503-420-6902 Email: markeklund96@gmail.com, aprileklund@gmail.com, troy@fowlerhomedesign.com, ag.brown143@gmail.com

Please note: The information submitted in this application may be subject to public records law.

APPLICANT'S REPRESENTATIVE (if different than above):

Mailing address: State/Zip:

Phone(s): Email:

SITE INFORMATION:

Address: 1620 SE Waverly Dr., Milwaukie, OR 97222 Map & Tax Lot(s): 11E26DB00300

Comprehensive Plan Designation: Zoning: R-MD Size of property: 0.84 acres

PROPOSAL (describe briefly):

A 1784 S.F. ADDITION TO THE EXISTING RESIDENCE. IT ALSO INCLUDES THE ADDITION OF A 306 S.F. PRE-FABRICATED CONSERVATORY.

SIGNATURE: I attest that I am the property owner or I am eligible to initiate this application per Milwaukie Municipal Code Subsection 19.1001.6.A. If required, I have attached written authorization to submit this application. To the best of my knowledge, the information provided within this application package is complete and accurate.

Submitted by: Mark Eklund Date: 9/3/2024

IMPORTANT INFORMATION ON REVERSE SIDE

*For multiple applications, this is based on the highest required review type. See MMC Subsection 19.1001.6.B.1.
** Natural Resource and Transportation Review applications **may require a refundable deposit.**

WHO IS ELIGIBLE TO SUBMIT A LAND USE APPLICATION (excerpted from MMC Subsection 19.1001.6.A):

Type I, II, III, and IV applications may be initiated by the property owner or contract purchaser of the subject property, any person authorized in writing to represent the property owner or contract purchaser, and any agency that has statutory rights of eminent domain for projects they have the authority to construct.

Type V applications may be initiated by any individual.

PREAPPLICATION CONFERENCE:

A preapplication conference may be required or desirable prior to submitting this application. Please discuss with Planning staff.

DEPOSITS:

Deposits require completion of a Deposit Authorization Form, found at www.milwaukieoregon.gov/building/deposit-authorization-form

REVIEW TYPES:

This application will be processed per the assigned review type, as described in the following sections of the Milwaukie Municipal Code:

- Type I: Section 19.1004
- Type II: Section 19.1005
- Type III: Section 19.1006
- Type IV: Section 19.1007
- Type V: Section 19.1008

THIS SECTION FOR OFFICE USE ONLY:

FILE TYPE	FILE NUMBER	AMOUNT (after discount, if any)	PERCENT DISCOUNT	DISCOUNT TYPE	DATE STAMP
Primary file	HR-2024-002	$ 2,000			Applicant materials received on 9/3/24. Payment received on 9/4/2024.
Concurrent application files		$			
		$			
		$			
		$			
Deposit (NR/TFR only)				☐ Deposit Authorization Form received	
TOTAL AMOUNT RECEIVED: $ 2,000			RECEIPT #: 28715		RCD BY: R.Dyar

Associated application file #s (appeals, modifications, previous approvals, etc.):

Neighborhood District Association(s): Historic Milwaukie

Notes: The applicant is proposing to alter a historic resource (1620 SE Waverly Dr) listed as significant on Milwaukie's local inventory.

Detailed Statement

Proposed Alterations at 1620 SE Waverly Dr.

9/3/2024
Prepared For: City of Milwaukie, Oregon
Prepared By: Fowler Home + Design

The summary of proposed alterations to the existing residence on the main floor include the addition of a primary wing located on the far east side of the residence that houses a bedroom, bath, and walk-in closet, the addition of a 306 s.f. prefabricated conservatory at the southwest side of the residence, extending the west garage wall 6', and extending the south kitchen and nook walls 8.5' and 6' respectively. The total main floor additions including the conservatory amounts to 1,436 s.f.

On the upper floor, slight wall extensions are made on the north wall above the porch, the east wall at the existing bath, the south wall, and west wall which amounts to a total of 348 s.f. additional area. The upper floor also includes the additions of a deck on the northwest and the south. All existing roofs are kept as existing as much as possible, such as the tallest roof form over the primary mass of the existing residence. The proposed roofs maintain the existing roof slopes and do not exceed the existing maximum height.

The two most critical elements outlined in the 1988 historic resource survey are the PERSON and STYLE categories. The STYE category states the residence as Colonial Revival style with elements of interest centered primarily around the entrance of the residence such as the paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters. Additional noted elements of interest include quoining at the entrance, an endwall chimney, a palladian window, the polygonal bay window with tent roof and spandrel, and the belt course over the second story windows.

The proposed alterations have little to no impact on the PERSON category as the overall character and layout of the existing residence is maintained. For the STYLE category, the proposed alterations enhance and add to the existing style by an increased number of Colonial Revival design elements than found in the existing residence. The proposed alteration Colonial Revival Design elements include an arched keystone entryway with full entablature and doric pilasters, curved molding around an oval window above the entrance, an arched entry door, gridded windows throughout, two curved copper roofs with oval windows below, an exposed stone chimney with a copper chimney cap, a tile cladded curved bay with a full entablature off the dining room, colonial wooden balusters, and a more extensive usage of materials that better reflect the Colonial Revival style such as brick, stone, copper, and painted cedar siding.

In addition to the increased Colonial Revival design elements in the proposed alterations, the alterations will also create a more efficient and safe residence through better insulation, higher performance windows, seismic fortification of the structure, and usage of high quality exterior materials that align with the Colonial Revival style.

The proposed alterations adhere to all relevant zoning and development standards. Refer to the plans and elevations for further information.

Staff Note: Modified statement received from applicant on 9/4/2024.

Detailed Statement

Proposed Alterations at 1620 SE Waverly Dr.

9/4/2024
Prepared For: City of Milwaukie, Oregon
Prepared By: Fowler Home + Design

The summary of proposed alterations to the existing residence on the main floor include the addition of a primary wing located on the far east side of the residence that houses a bedroom, bath, and walk-in closet, the addition of a 306 s.f. prefabricated conservatory at the southwest side of the residence, extending the west garage wall 6', and extending the south kitchen and nook walls 8.5' and 6' respectively. The total main floor additions including the conservatory amounts to 1,436 s.f.

On the upper floor, slight wall extensions are made on the north wall above the porch, the east wall at the existing bath, the south wall, and west wall which amounts to a total of 348 s.f. additional area. The upper floor also includes the additions of a deck on the northwest and the south. All existing roofs are kept as existing as much as possible, such as the tallest roof form over the primary mass of the existing residence. The proposed roofs maintain the existing roof slopes and do not exceed the existing maximum height.

The two most critical elements outlined in the 1988 historic resource survey are the PERSON and STYLE categories. The STYE category states the residence as Colonial Revival style with elements of interest centered primarily around the entrance of the residence such as the paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters. Additional noted elements of interest include quoining at the entrance, an endwall chimney, a palladian window, the polygonal bay window with tent roof and spandrel, and the belt course over the second story windows.

The proposed alterations have little to no impact on the PERSON category as the overall character and layout of the existing residence is maintained. For the STYLE category, the proposed alterations enhance and add to the existing style by an increased number of Colonial Revival design elements than found in the existing residence. The proposed alteration Colonial Revival Design elements include an arched keystone entryway with full entablature and doric pilasters, curved molding around an oval window above the entrance, an arched entry door, gridded windows throughout, two curved copper roofs with oval windows below, an exposed stone chimney with a copper chimney cap, a tile cladded curved bay with a full entablature off the dining room, colonial wooden balusters, and a more extensive usage of materials that better reflect the Colonial Revival style such as brick, stone, copper, and painted cedar siding.

In addition to the increased Colonial Revival design elements in the proposed alterations, the alterations will also create a more efficient and safe residence through better insulation, higher performance windows, seismic fortification of the structure, and usage of high quality exterior materials that align with the Colonial Revival style.

The proposed alterations adhere to all relevant zoning and development standards. Refer to the plans and elevations for further information.

Approval Criteria:

1. *Retention of Original Construction*

Distinguishing original qualities defining a resource's character shall not be destroyed. Removal or alteration of historic materials or distinctive architectural features should be avoided when possible.

Response: The majority of the existing walls and the primary and tallest portion of the roof will remain. The Colonial Revival design elements are proposed to be replaced with different, yet appropriate design elements of the Colonial Revival style. The original design elements may be re-used or replicated in the alterations if it is preferable.

2. *Building Height*

Existing building heights should be maintained. Alteration of roof pitches shall be avoided. Raising or lowering a building's permanent elevation when constructing a foundation shall be avoided, except as required by building code or floodplain development permit.

Response: The tallest roof form will remain, thus maintaining the existing buildings highest elevation. All proposed roofs match the existing roof pitches.

3. *Horizontal Additions*

The scale and proportion of building additions, including the relationship of windows to walls, shall be visually compatible with the traditional architectural character of the historic building. Contemporary design for alterations and additions is acceptable if the design respects the building's original design and is compatible with the original scale, materials, and window and door-opening proportions of the building.

Response: All proposed alterations, including the relationship of windows to walls, remain compatible with the original architectural character, scale, materials, and proportions of the historic residence.

4. *Windows*

Window replacements shall match the visual qualities of original windows as closely as possible. Wood window frames are preferred in meeting this standard. However, if non wood replacements exhibit similar visual qualities as their wooden counterparts, they may be acceptable. The original number of window panes shall be maintained or restored when replacements are required.

Response: The window replacements will match the frames and gridded style of the original windows as shown in the elevations on the plans.

5. *Restoration Possible*

Except where building code precludes it, new additions or alteration to buildings shall be done in such a manner that if such additions or alterations were to be removed in the future, the essential form and integrity of the original building could be restored.

Response: The proposed alterations and additions shall be constructed in such a manner that the additions and alterations could be removed and restored to its existing condition, thus preserving the essential form and integrity of the original building.

6. *Signs and Lighting*

Signs, lighting, and other appurtenances (such as walls, fences, awnings, and landscaping) shall be visually compatible with the original character of the building.

Response: There is no proposed signage. The proposed lighting and other appurtenances will be visually compatible with the original character of the building.

7. *Time Period Consistency*

Buildings shall be recognized as products of their own time. Alterations that have no Historical basis or which seek to create an earlier appearance shall be avoided.

Response: All proposed alterations and additions are deeply based in the Colonial Revival style.

8. *Visual Integrity/Style*

Distinctive stylistic features, such as a line of columns, piers, spandrels, or other primary structural elements, or examples of skilled craftsmanship which characterize a building, shall be maintained or restored as far as is practicable.

Response: The proposed alterations and additions replace existing stylistic features with different, equivalent features of the same style. Re-using and/or replicating the exact existing stylistic features may be done if preferred.

9. *Replacement or Additional Materials*

Whenever possible, deteriorated architectural features shall be repaired rather than replaced. In the event replacement of an existing feature is necessary, or an addition is

proposed, new materials should match those of the original building, to the extent possible, in composition, design, color texture, and other visual qualities.

Response: The proposed alterations and additions match the existing materials of the historic residence. The new proposed materials are all commonplace within the Colonial Revival style.

10. Buffering

An appropriate buffer or screen, as provided under Subsection 19.504.6, may be required when a new commercial or industrial improvement or use is proposed on or adjacent to a designated resource, or within or adjacent to an historic district.

Response: Our current proposal does not include any buffering or screening. However, if required, the buffering or screening will be consistent with requirements from NPS.

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

- ALL EXCESS GRADING MATERIAL TO BE EXPORTED TO AN APPROVED DISPOSAL LOCATION.
- ALL FILL AREAS (ie: UNDER GARAGE FLOORS, SIDEWALKS, DRIVEWAYS, ETC.. TO BE COMPACTED GRANULAR FILL.
- THERE WILL BE A SLIGHT OVER EXCAVATION TO PROVIDE CONCRETE FORMING ALL AROUND NEW STRUCTURE.
- PROVIDE COUNTY/CITY APPROVED SEDIMENT FENCING AROUND EXCAVATED AREA PRIOR TO EXCAVATION AND CONSTRUCTION.
- PROVIDE COUNTY/CITY APPROVED STABILIZED GRAVELED CONSTRUCTION ENTRANCE PRIOR TO EXCAVATION AND CONSTRUCTION.
- STOCKPILES MUST BE COVERED WITH MULCH OR PLASTIC SHEETING BETWEEN OCTOBER 1 AND APRIL 30.
- CONTRACTOR/ SUB-CONTRACTOR TO VERIFY LOCATION OF ALL UTILITIES PRIOR TO EXCAVATION AND CONSTRUCTION.
- BOUNDARY AND TOPOGRAPHY INFORMATION HAS BEEN PROVIDED TO FOULER HOME DESIGN INC. FOULER HOME DESIGN, INC WILL NOT BE HELD LIABLE FOR THE ACCURACY OF THIS INFORMATION. IT IS THE SOLE RESPONSIBILITY OF THE CONTRACTOR /OWNER TO VERIFY ALL SITE CONDITIONS INCLUDING FILL PLACED ON SITE.

- ELEVATION LEGEND:
  - EE= EXISTING GRADE ELEVATION
  - FE= FINAL GRADE ELEVATION
  - FFE= FINISHED FLOOR ELEVATION
- PROVIDE A MINIMUM GRAVEL BASE UNDER ALL DRIVEWAY AREAS.
- PROVIDE A 4" MINIMUM GRAVEL BASE UNDER ALL SIDEWALK AND PATIO AREAS.
- PIPE ALL STORM DRAINAGE FROM THE BUILDING TO A COUNTY/CITY DISPOSAL POINT/CONNECTION.
- MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
- PROVIDE AND MAINTAIN FINISH GRADE WITH POSITIVE DRAINAGE AWAY FROM STRUCTURE ON ALL SIDES WITH A SLOPE OF 6" MINIMUM IN 10'-0".

EROSION CONTROL PLAN

- COVERED STOCKPILES - COVER W/- PLASTIC OCT. 1 - MAY 31.
- SEDIMENT FENCE
- CONSTRUCTION ENTRANCE (ACCESS POINT)
- WORK STAGING/ MATERIAL STORAGE
- N.B. 3" APPROVED COVER ON ALL AREAS OF BARE SOIL UNTIL PERMANENT LANDSCAPE IS IN PLACE
- NON-WOVEN INLET PROTECTION AT THE FIRST DOWNSTREAM CATCH BASIN
- WOODEN CURB RAMP
- DIRECTION OF STORM-WATER FLOW ON SITE

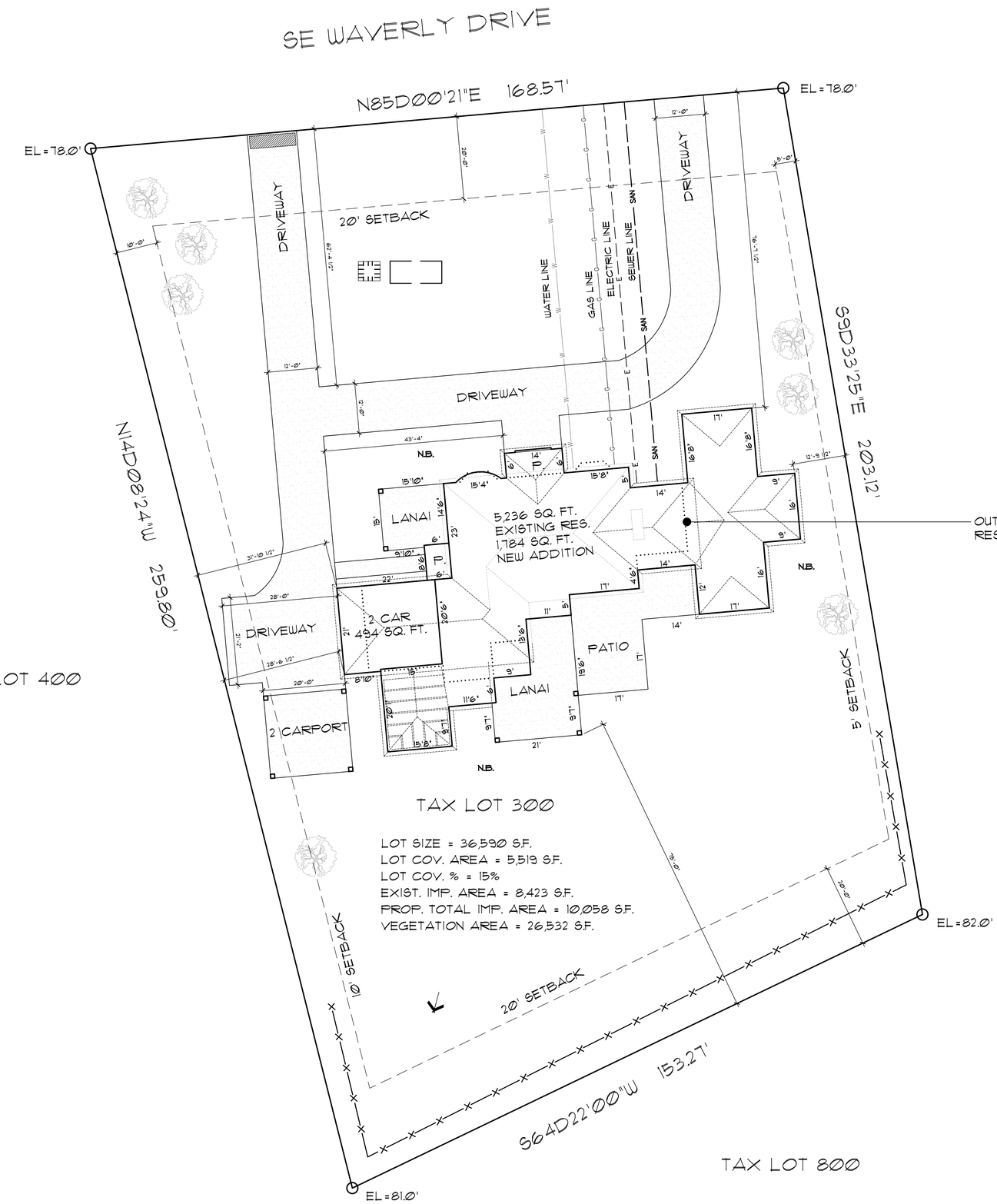
-NO STOCKPILES ARE TO BE LOCATED IN THE SIDE SETBACK AREAS.



IMPORTANT DISCLOSURE
- PLEASE READ:

THE PLANS YOU HAVE PURCHASED ARE FOR THE USE OF ONE SET OF PLANS FOR ONE HOME. UNDER NO CIRCUMSTANCES IS IT LEGAL TO BUILD FROM THESE PLANS MORE THAN ONCE WITHOUT THE WRITTEN CONSENT FROM THE DESIGNER TROY FOULER. THESE PLANS ARE COPYRIGHTED AND IT IS A VIOLATION OF FEDERAL COPYRIGHT LAWS TO REPRODUCE THESE PLANS. FOULER HOME DESIGN LLC WILL FULLY PROSECUTE ANY PARTY THAT IS FOUND REPRODUCING THESE PLANS. FURTHERMORE IT IS UNDERSTOOD THAT IT IS COMPLETELY THE RESPONSIBILITY OF THE CONTRACTOR TO CONSTRUCT THE HOME DESCRIBED HEREIN, ON ANY PARTICULAR SITE AND WITHIN THE CONFINES OF THE GOVERNING JURISDICTION. FOULER HOME DESIGN LLC. TAKES NO RESPONSIBILITY FOR THE CONFORMANCE OF THIS PLAN TO ANY CODE OR ANY BUILDING SITE.

CONTRACTOR TO VERIFY EXISTING CONDITIONS AND UTILITIES, TYP.



FOWLER HOME + DESIGN

THE EKLUND RESIDENCE
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 4/20/2024
SCALE: 1"=10'-0"
FILE:

PLOT PLAN

Ø.

THESE PLANS AND DESIGNS HEREIN ARE COPYRIGHTED UNDER FEDERAL LAW BY TROY FOULER ♦ FOULER HOME DESIGN LLC 2012

ELEVATION NOTES:

1. ROOFING MATERIAL TO BE ARCHITECTURAL COMPOSITION MATERIALS AND 5" STANDING SEAM METAL ROOFING SEE ELEVATION PAGE. ROOF SHINGLES TO BE NAILED PER MANUFACTURED INSTRUCTIONS FOR 80 MPH MINIMUM WIND AREAS.
2. ROOF PITCH TO BE SHOWN ON PLANS
3. ALL EAVES TO BE NOTED ON PLANS WITH A 5" GALVANIZED FACIA GUTTER ON SPECIFIED FACIA BD. PROVIDE 3" GALVANIZED DOWNSPOUTS (DS) AS SHOWN ON ROOF FRAMING PLAN.
4. SIDING NOTED ON PLANS.
5. ALL WINDOW & DOOR TRIM TO BE 5/4 X 4 AT SIDES AND 5/4 X 6 CROWN & SILL.
6. SIDING TO BE SPECIFIED ON PLAN. CAULK ALL CORNER BOARDS, JOINTS, WINDOWS, DOORS AND SURROUNDS.
7. ALL CORNER BOARD TRIM TO BE 2 X 4 PRIMED BD. AS SHOWN ON PLAN.
8. COVERED PORCHES AND EAVE SOFFITS TO BE 1/2" EXT. PLYWOOD OR EQUAL TOO. CAULK ALL JOINTS.
9. MASONARY VENEER TO BE CULTURED STONE OR EQUAL AS SHOWN ON PLAN. PROVIDE GALVANIZED FLASHING ON A MASONARY SILL CAP OVER VENEER. VERIFY LOCATION AND TYPE OF MASONARY WITH BUILDER PRIOR TO CONSTRUCTION.
10. PROVIDE 2 X 10 ROUGH SAWN CEDAR OR EQUAL AT ALL BELLY BANDS WITH A GALVANIZED "Z" FLASHING AT EXPOSED TOP. LOCATIONS ARE SHOWN ON PLAN UNLESS OTHERWISE NOTED.
11. PROVIDE VENTS AS SHOWN, SHUTTERS AND TRIMS ON ELEVATIONS AS SHOWN ON PLAN.
12. PROVIDE VINYL WINDOWS AS SHOWN ON PLAN.
13. EXPOSED CONCRETE WALKS TO BE BROOMED FINISH AS SHOWN ON PLAN.
14. MAXIMUM FOUNDATION EXPOSURE TO BE 18" FROM FINISHED GRADE.
15. MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
16. FINISH GRADE TO BE 1:1 MAXIMUM SLOPE WITH A 6" MINIMUM IN 10'-0" MINIMUM SLOPE AWAY FROM STRUCTURE ALL AROUND.
17. SEE ELEVATIONS FOR ANY ADDITIONAL NOTATIONS THAT MAY BE OF IMPORTANCE.
18. ALL WORK IS TO COMPLY WITH THE LATEST ADOPTED VERSIONS OF THE INTERNATIONAL ONE & TWO FAMILY DWELLING CODE, UNIFORM BUILDING CODE OF ANY APPLICABLE STATE, COUNTY OR LOCAL JURISDICTION.
19. PRIOR TO BEGINING CONSTRUCTION, THE PLANS AND SPECIFICATIONS SHALL BE APPROVED BY THE LOCAL BUILDING AUTHORITY.
20. THE CONTRACTOR IS RESPONSIBLE TO CHECK THE PLANS AND IS TO NOTIFY THE DESIGNER OF ANY ERRORS OR OMISSIONS PRIOR TO THE START AND/OR DURING CONSTRUCTION. THE DESIGNER IS NOT RESPONSIBLE FOR CONSTRUCTION MEANS AND METHODS, ACTS OR OMISSIONS OF THE CONTRACTOR AND/OR SUBCONTRACTOR.
21. BUILDING THIS PLAN ON SITE CONDITIONS DIFFERENT FROM THOSE SHOWN ON THE PLANS MAY REQUIRE MODIFIED FOUNDATION AND FRAMING DETAILS. THE CONTRACTOR IS RESPONSIBLE TO REVIEW SPECIFIC SITE CONDITIONS WITH THE DESIGNER BEFORE CONSTRUCTION.
22. VERIFY FOUNDATION AND FRAMING DETAILS (WHERE APPLICABLE) WITH MECH, PLUMBING, ELECTRICAL AND OR OTHER SUBCONTRACTORS TO ASSURE PROPER CONSTRUCTION INSTALLATION.
23. PLUMBING, ELECTRICAL AND MECHANICAL DIAGRAMS, LAYOUTS AND/OR DESIGN TO BE
24. SUPPLIED BY CONTRACTOR AND/OR SUB-CONTRACTOR.
25. ENGINEERED PRODUCTS (ROOF TRUSSES, FLOOR JOISTS) TO HAVE DESIGN, ENGINEERING SPECIFICATIONS AND LAYOUT SUPPLIED FROM MANUFACTURER.
26. WRITTEN DIMENSIONS SHALL HAVE PRECEDENCE OVER SCALED DIMENSIONS. DO NOT SCALE THE DRAWINGS. THE CONTRACTOR SHALL VERIFY AND IS RESPONSIBLE FOR ALL DIMENSIONS (INCLUDING ROUGH OPENINGS) AND CONDITIONS ON THE JOB.
27. SPECIFIC MANUFACTURERS AND MATERIALS DEPICTED ON THESE PLANS ARE AN INDICATION OF QUALITY AND STRENGTH. VERIFY ALL CONSTRUCTION MATERIAL SUBSTITUTIONS WITH CURRENT APPLICABLE BUILDING CODES AND LOCAL BUILDING OFFICIALS PRIOR TO INSTALLATION/SUBSTITUTION.
28. CONTRACTOR SHALL BE RESPONSIBLE FOR ANY VARIATIONS OR DEVIATIONS FROM THE ORIGINAL PLANS WITHOUT WRITTEN CONFIRMATION FROM THE DESIGNER.
29. ALL DIMENSIONS AND SQUARE FOOTAGE MAY VARY.
30. THE TYPE OF EXTERIOR FINISH, THE INSTALLATION, AND THE WATERPROOFING DETAILS ARE TO BE THE FULL RESPONSIBILITY OF THE OWNER/BUILDER. THIS DESIGNER ASSUMES NO RESPONSIBILITY OF THE BUILDING ENVELOPE

DESIGN LOADS:

WIND	110 MPH OR LESS
SEISMIC DESIGN CATEGORY	D2
FROST DEPTH	18 INCHES
ROOF DEAD LOAD	17 PSF
ROOF LIVE LOAD	20 PSF
ROOF SNOW LOAD	25 PSF
FLOOR DEAD LOAD	15 PSF
FLOOR LIVE LOAD	40 PSF
STAIRS	40 PSF
EXTERIOR BALCONIES	60 PSF
DECKS	60 PSF

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WINDOW SCHEDULE

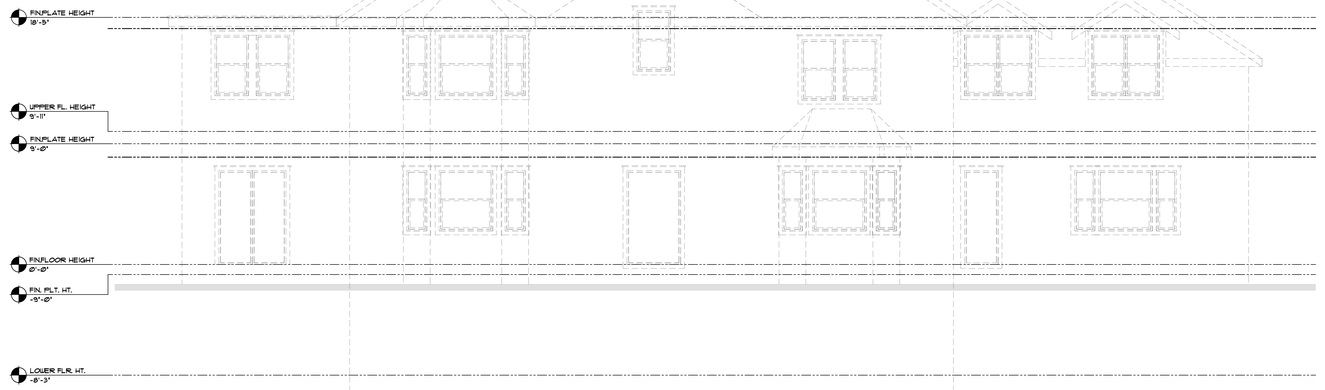
MARK	SIZE & TYPE	QUANTITY
1	3/6X4/3 OVAL FX.	2
2	3-2/6X6/0 FX. MULLED	1
3	4-2/6X6/0 MULLED FX.-CSMT.-CSMT.-FX.	4
4	2/6X6/0 FX.	3
5	2/6X6/0 CSMT.	4
6	3-2/6X5/0 MULLED FX.-CSMT.-FX.	4
7	2/6X5/0 CSMT.	5
8	3-2/6X6/0 MULLED FX.-CSMT.-FX.	2
9	2-2/6X3/0 CSMT. MULLED	2
10	2/0X5/0 CSMT.	1
11	2-2/6X6/0 CSMT. MULLED	1
12	2/6X3/0 FX.	6
13	2/6X2/6 FX.	1
14	3-2/6X5/0 FX. MULLED	1
15	2/6X2/0 FX.	1

NOTE: ALL WINDOWS TO HAVE GRIDS U.N.O.



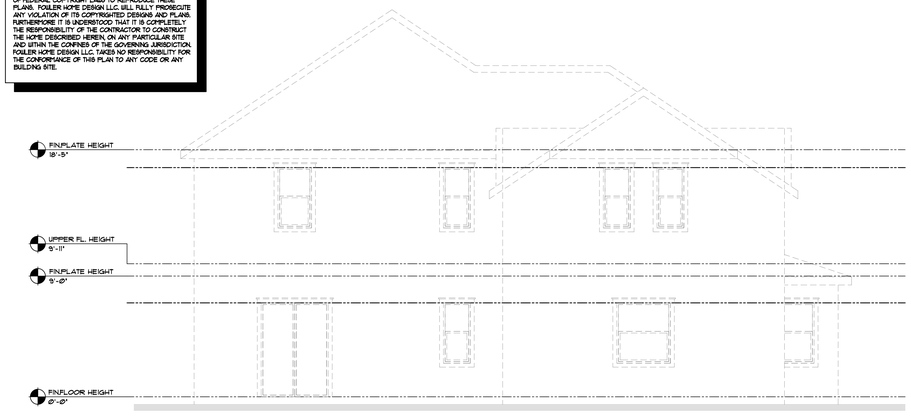
FRONT ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL



EXIST. FRONT ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



EXIST. RIGHT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



RIGHT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 4/20/2024
SCALE: 1/4"=1'-0"
FILE:

EXTERIOR ELEVATION

1.

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CONTRACTOR TO SELECT 1 OPTION

(ORSC, 2021 TABLE N1101.1)

1	HIGH EFFICIENCY HVAC SYSTEM: GAS-FIRED FURNACE OR BOILER WITH MINIMUM AFUE OF 94% OR AIR-SOURCE HEAT PUMP WITH HSPF OF 10.2 TO 14.0 SEER COOLING, OR GROUND SOURCE HEAT PUMP COP OF 3.5, OR ENERGY STAR RATED
2	HIGH EFFICIENCY WATER HEATING SYSTEM: NATURAL GAS/PROPANE, WATER HEATER WITH MIN. UEF OF 0.360, OR ELECTRIC HEAT PUMP WATER HEATER W/ MIN. 2.0 COP, OR NATURAL GAS/PROPANE TANKLESS/ INSTANTANEOUS HEATER W/ MIN. 0.080 UEF AND DRAIN WATER HEAT RECOVERY UNIT INSTALLED ON MIN. OF ONE SHOWER/SHARE
3	WALL INSULATION UPGRADE EXTERIOR WALLS U-0.045/R-21 CONVENTIONAL FRAMING WITH R-3.0 CONTINUOUS INSULATION
4	ADVANCED ENVELOPE WINDOWS U-0.25 (AREA WEIGHTED AVERAGE) AND, FLAT CEILINGS U-0.017/R-60, AND FRAMED FLOORS U-0.029/R-38 OR SLAB EDGE INSULATION TO F-2.0 AT OR LESS (R-18 FOR 48", R-15 FOR 36" OR R-5 FULLY INSULATED SLAB)
5	DUCTLESS HEAT PUMP: FOR DWELLING UNITS WITH ALL-ELECTRIC HEAT PROVIDE: DUCTLESS HEAT PUMP OF MIN. HSPF 10 IN PRIMARY ZONE REPLACES ZONAL ELECTRIC HEAT SOURCES, AND PROGRAMMABLE THERMOSTAT FOR ALL HEATERS IN BEDROOMS
6	HIGH EFFICIENCY THERMAL ENVELOPE UA: PROPOSED UA IS 8% LOWER THAN THE CODE UA
7	GLAZING AREA GLAZING AREA MEASURED AS THE TOTAL OF FRAMED OPENINGS IS LESS THAN 12% OF CONDITIONED FLOOR AREA
8	3 ACH AIR LEAKAGE CONTROL + EFFICIENT VENTILATION ACHIEVE A MAX. OF 3.0 ACH@ 50 WHOLE-HOUSE AIR LEAKAGE WHEN THIRD-PARTY TESTED AND PROVIDE A WHOLE-HOUSE VENTILATION SYSTEM INCLUDING HEAT RECOVERY WITH A MINIMUM SENSIBLE HEAT RECOVERY EFFICIENCY OF NOT LESS THAN 66%

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WINDOW SCHEDULE

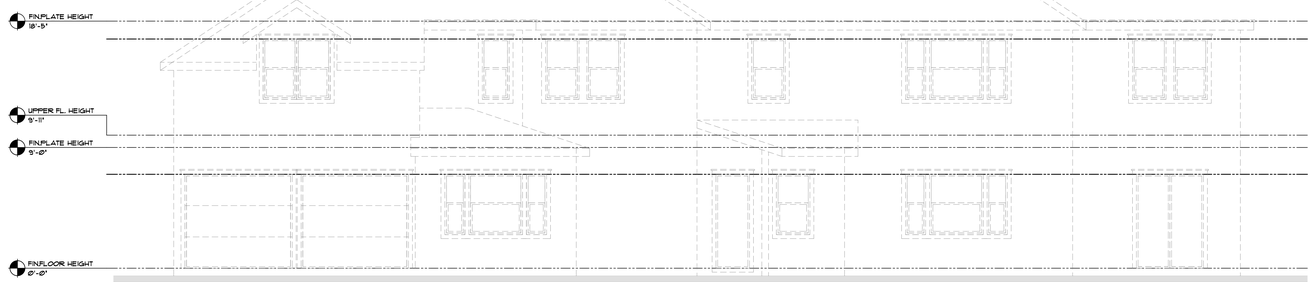
MARK	SIZE + TYPE	QUANTITY
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2	3-2/6X6/0 FX. MULLED	1
3	4-2/6X6/0 MULLED FX.-CSMT.-CSMT.-FX.	4
4	2/6X6/0 FX.	3
5	2/6X6/0 CSMT.	4
6	3-2/6X5/0 MULLED FX.-CSMT.-FX.	4
7	2/6X3/0 CSMT.	5
8	3-2/6X6/0 MULLED FX.-CSMT.-FX.	2
9	2-2/6X3/0 CSMT. MULLED	2
10	2/0X3/0 CSMT.	1
11	2-2/6X6/0 CSMT. MULLED	1
12	2/6X3/0 FX.	6
13	2/6X2/6 FX.	1
14	3-2/6X3/0 FX. MULLED	1
15	2/6X2/0 FX.	1

NOTE: ALL WINDOWS TO HAVE GRIDS U.N.O.



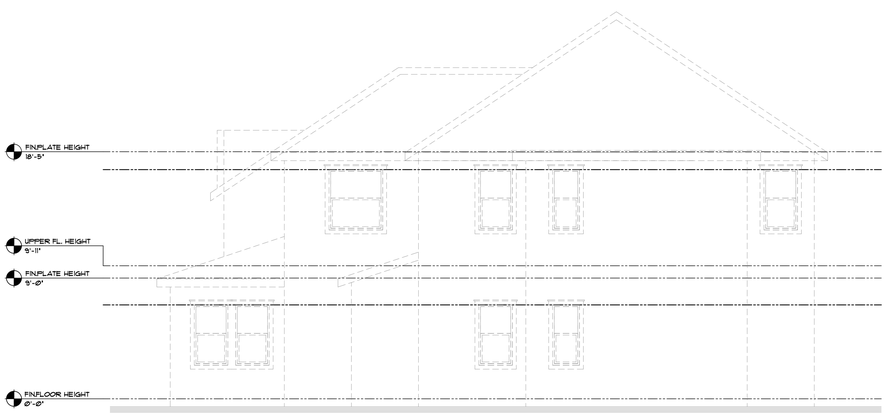
REAR ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL



EXIST. REAR ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



EXIST. LEFT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



LEFT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

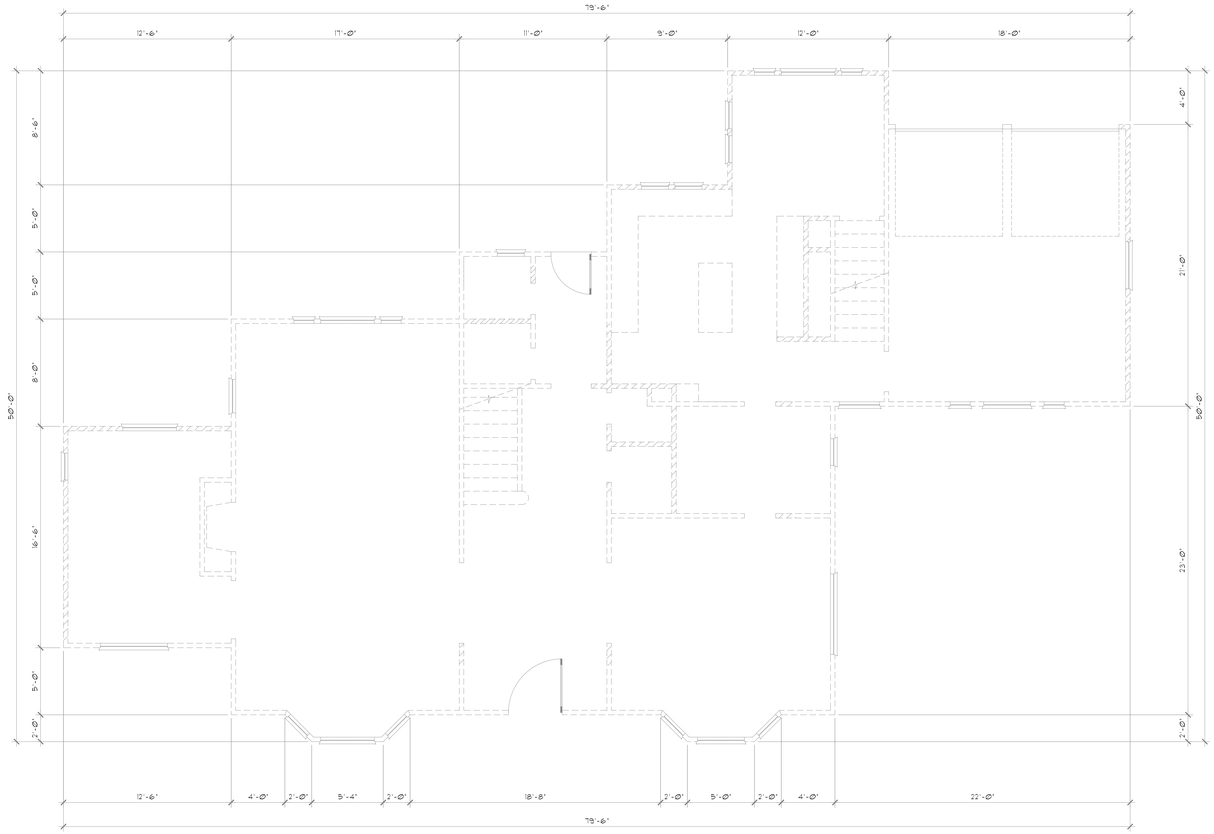
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 4/20/2024
SCALE: 1/4"=1'-0"
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EXTERIOR ELEVATION

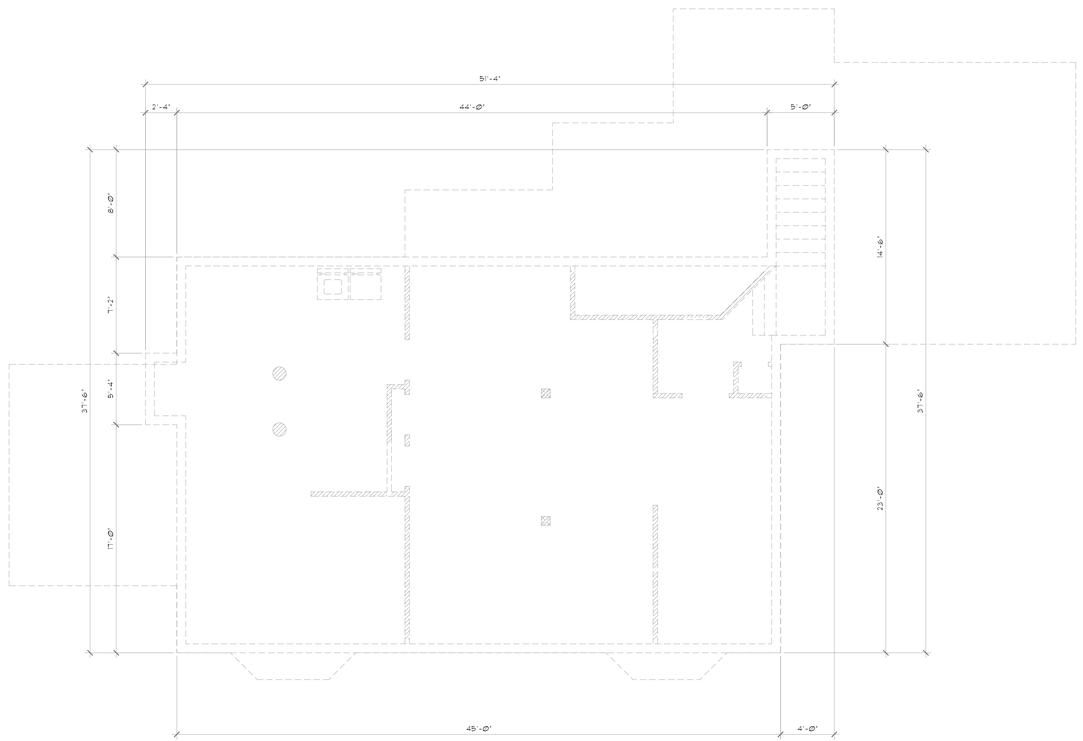
2.

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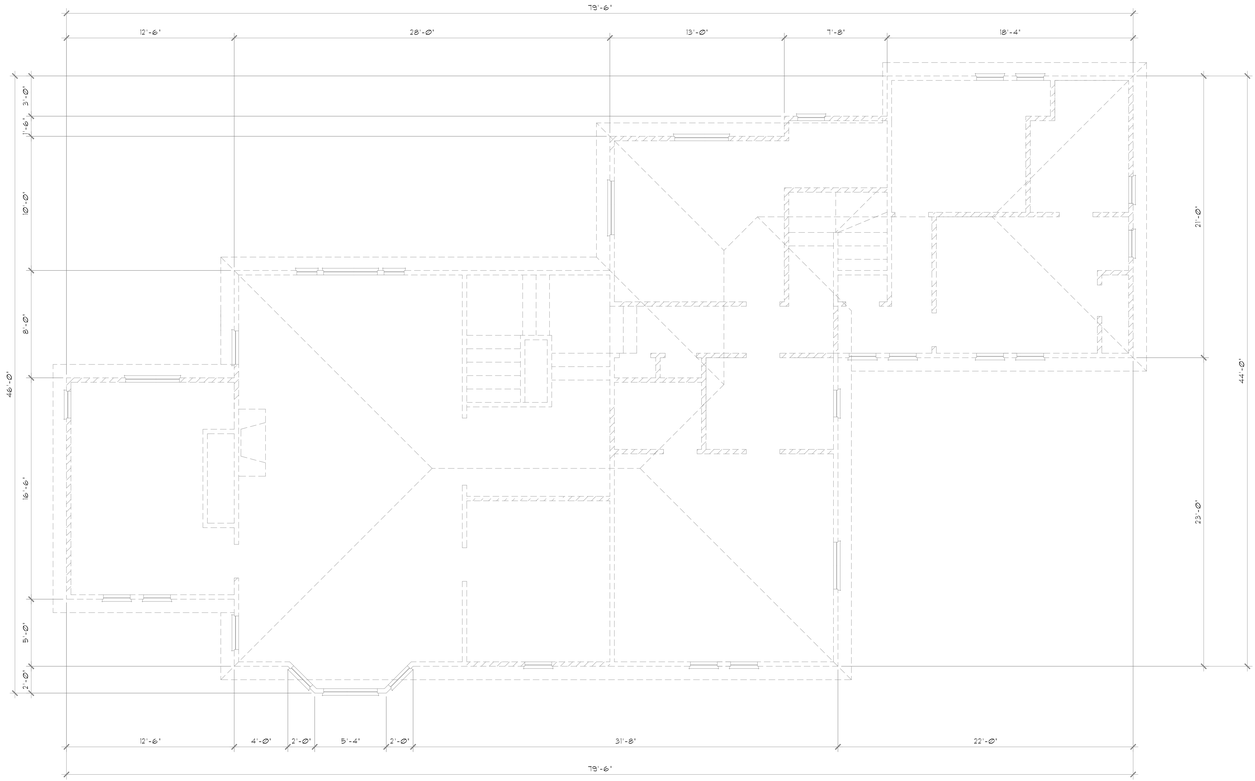
EXIST. MAIN FLOOR PLAN

1,956 SQ. FT. EXISTING 1/4"=1'-0"



EXIST. LOWER FLOOR PLAN

1,226 SQ. FT. EXISTING 1/4"=1'-0"



EXIST. UPPER FLOOR PLAN

2,054 SQ. FT. EXISTING 1/4"=1'-0"

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WALL LEGEND

- NEW (N) 2x WALL
- EXISTING (E) WALL TO BE REMOVED
- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

ALL DIMENSIONS TO OR FROM (E) STRUCTURE ARE FOR REFERENCE ONLY. CONTRACTOR TO FIELD VERIFY ALL DIMENSIONS AND IS RESPONSIBLE TO CONTACT DESIGNER W/ANY DISCREPENCIES.

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

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PLAN No.:
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DATE: 4/20/2024
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FILE:

EXISTING FLOOR PLANS

3

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FLOOR PLAN FRAMING NOTES:

1. ALL EXTERIOR WINDOW AND DOOR HEADERS TO BE 4 X 10 DF-L NO. 2 UNLESS OTHERWISE NOTED. (U.O.N.)
2. ALL EXTERIOR WALLS TO BE 2 X 6 STUDS @ 16" O.C. AND INTERIOR WALLS TO BE 2 X 4 STUDS @ 16" O.C. FOUNDATION PONY WALLS SHALL BE FRAMED OF 2 X 6 STUDS.
3. STANDARD STUD HEIGHT FOR UPPER FLOOR TO BE 9'-0" CEILING HEIGHT.
4. STANDARD STUD HEIGHT FOR MAIN FLOOR TO BE 9'-0" CEILING HEIGHT.
5. WINDOW AND DOOR HEADER HEIGHTS TO BE 8'-0" @ UPPER FLOOR AND 8'-0" @ LOWER FLOOR U.O.N. DOOR OPENINGS AND OTHER OPENING TO BE ALLIGNED WITH WINDOW HEIGHTS U.O.N.
6. ALL WOOD IN DIRECT CONTACT WITH CONCRETE TO BE PRESSURE TREATED AND/OR PROTECTED BY 55# FELT MOISTURE BARRIER.
7. PROVIDE POLYISOCOCYANURATE FOAM TYPE INSULATION AT FLOOR AND PLATE LINES, OPENINGS IN PLATES, CORNER STUD CAVITIES AND AROUND DOOR AND WINDOW ROUGH OPENINGS.
8. BEARING FOR JOISTS, SUPPORT MEMBERS, HEADERS, AND BEAMS TO BE 1½ THE MEMBERS WIDTH AND SOLID BEARING TO FOOTINGS. 2 X JOISTS TO HAVE 1-1/2 MIN. BEARING, U. O.N.
9. PROVIDE FIRE BLOCKING, DRAFT STOPS AND FIRE STOPS AS PER 2021 O.R.S.C. SECTION 602.8.
10. BLOCK ALL STUD WALLS AT SHEATHING SPLICES OR AS REQUIRED.
11. INTERIOR PASSAGE DOORS TO HAVE A MINIMUM OF (2) 2 X TRIMMERS EACH SIDE OF DOOR AND TO BE CENTERED IN WALLS.
12. ALL HOLDOWNS, JOIST HANGERS, BEAM HANGERS AND OTHER CONNECTORS TO BE "SIMPSON" OR EQUAL.
13. ALL STUD WALLS SHALL HAVE DOUBLE TOP PLATES OF THE SAME DIMENSION AS THE WALL FRAMING. PLATES SHALL OVERLAP A MINIMUM OF 48" BETWEEN SPLICES WITH AT LEAST (8) 16D NAILS THROUGH BOTH PLATES OF SPLICE.
14. DO NOT NOTCH OR DRILL THROUGH ANY SUPPORT COLUMNS, GIRDERS, BEAMS, JOIST SUPPORTING BEARING WALLS OR ANY OTHER CONCENTRATED LOAD BEARING MEMBER UNLESS SPECIFICALLY NOTED ON PLANS. CONTACT DESIGNER IN ANY SUCH SITUATIONS ARISE.
15. THIS STRUCTURE TO BE ADEQUATELY BRACED FOR WIND AND GRAVITY LOADS UNTIL THE ROOF, FLOOR AND WALLS HAVE BEEN PERMANENTLY FRAMED TOGETHER AND SHEATHED.

LUMBER SPECIES AND GRADING:

A. POSTS, BEAMS, HEADERS.	DF-L NO.2
B. FLOOR JOISTS, CEILING JOISTS, RAFTERS.	DF-L NO. 2
C. SILLS, PLATES, BLOCKING, BRIDGING.	DF-L NO. 3
D. STUDS.	DF-L STUD GRADE
E. STUDS OVER 10' HIGH.	DF-L NO. 2
F. FLOOR DECKING.	DF-L UTILITY GRADE
G. WALL, ROOF SHEATHING.	CDX EXT. APA RATED PLY OR OSB 2-M-W
H. GLU-LAM BEAMS	FB-2400 DRY ADH. INTERIOR (EXT. ADH. AT EXT. COND.)
I. PATALLEL STRAND LUMBER (PSL) MATERIALS	FB-2900 E=2.0 FV=290 UNLESS OTHERWISE NOTED.
J. LAMINATED VENEER LUMBER (LVL) MATERIALS	FB-2600 E=1.8 FV=285 UNLESS OTHERWISE NOTED.

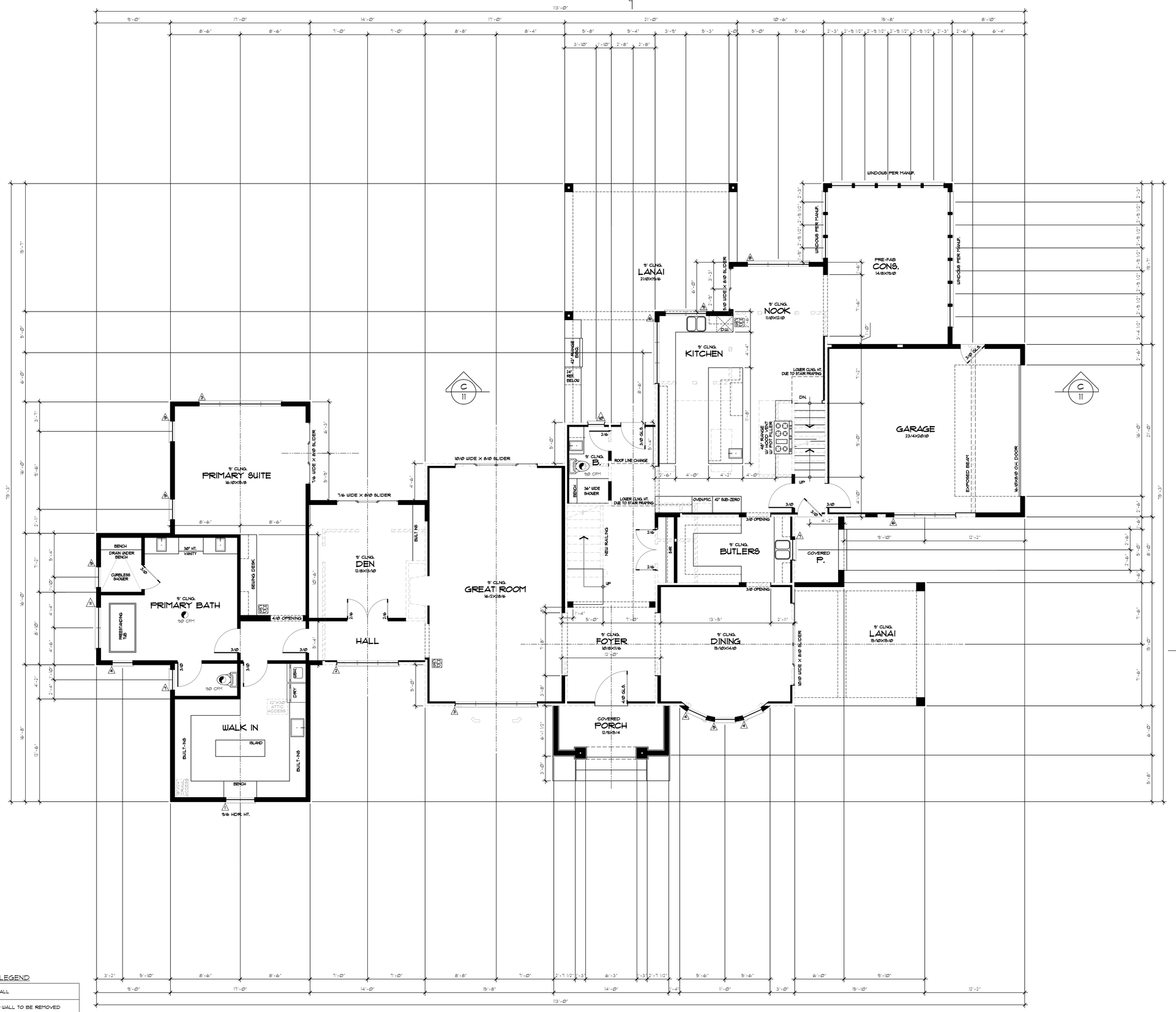
NAILING SCHEDULE:

REFER TO: O.R.S.C. 2021 TABLE R602.3(1)

WINDOW SCHEDULE

MARK	SIZE & TYPE	QUANTITY
1	3/6X4/3 OVAL FX.	2
2	3-2/6X6/0 FX. MULLED	1
3	4-2/6X6/0 MULLED FX.-CSMT.-CSMT.-FX.	4
4	2/6X6/0 FX.	3
A	2/6X6/0 CSMT.	4
A1	3-2/6X3/0 MULLED FX.-CSMT.-FX.	4
B	2/6X3/0 CSMT.	5
B1	3-2/6X6/0 MULLED FX.-CSMT.-FX.	2
B2	2-2/6X3/0 CSMT. MULLED	2
B3	2/0X3/0 CSMT.	1
B4	2-2/6X6/0 CSMT. MULLED	1
C	2/6X3/0 FX.	6
C1	2/6X2/6 FX.	1
C2	3-2/6X3/0 FX. MULLED	1
C3	2/6X2/0 FX.	1

NOTE: ALL WINDOWS TO HAVE GRIDS U.N.O.


113'-0"
9' CLNG. LANAI 21'6X7'5/6
9' CLNG. NOOK 11'6X12'10
9' CLNG. KITCHEN
PRE-FAB CONS. 14'8X9'5/0
WINDOWS PER MANUF.
9' CLNG. PRIMARY SUITE 16'10X15'8
7/6 WIDE X 8'0 SLIDER
10'0 WIDE X 8'0 SLIDER
5'0 WIDE X 8'0 SLIDER
9' CLNG. B.
9' CLNG. DEN 12'8X13'10
9' CLNG. GREAT ROOM 16'7X23'6
9' CLNG. FOYER 10'0X11'6
9' CLNG. DINING 15'10X14'10
9' CLNG. BUTLERS
9' CLNG. LANAI 15'10X5'10
COVERED P.
COVERED PORCH 12'8X5'4
GARAGE 23'4X32'10
EXPOSED BEAM
16'0 WIDE O.H. DOOR
LOWER CLNG. HT. DUE TO STAIR FRAMING
42" ROOF LIGHT W/ ROOF FILLER
OVEN/MC
42" SUB-ZERO
36" WIDE SHOWER
ROOF LINE CHANGE
42" RISE BELOW
BENCH
DRAIN UNDER BENCH
CURBLESS SHOWER
36" HT. VANITY
LINEN CLOSET
PRESTWICK TUB
BEING DESK
4'0 OPENING
3'0 OPENING
HALL
BUILT-INS
WALK IN
ISLAND
DRY
LAUN.
22"X30" ATTIC ACCESS
CABLE ACCESS
7/6 HDR. HT.
NEW RAILING
UP
DN.
3'0 GLS.
4'0 GLS.
2'6 GLS.
3'0 OPENING
3'0 OPENING
3'0 OPENING

FLOOR PLAN FRAMING NOTES CONT.:

INSULATION:

1. USE PATH 1 OF 2021 ORSC ENERGY CODE AND THE FOLLOWING. INSULATION VALUES TABLE N1101(1)

ENERGY COMPLIANCE	PATH 1
WALL INSULATION	R-21/R-23
WALL INSULATION BELOW GRADE	R-15/R-21
FLAT CEILINGS	R-49
VAULTED CEILINGS	R-30
UNDERFLOORS	R-30
SLAB EDGE PERIMETER	R-15
HEATED SLAB INTERIOR	R-10
WINDOWS	U-0.27
WINDOW AREA LIMITATION	N/A
SKYLIGHTS	U-0.50
EXTERIOR DOORS	U-0.20
EXTERIOR DOORS W/ >2.5 FT. GLAZING	U-0.40
FORCED AIR DUCT	R - 8

2. INSULATION:
   - R-49 — ROOF (FLAT CEILING)
   - R-30 — ROOF (VAULT CEILING)
   - R-30 — FLOORS OVER UNHEATED SPACES
   - R-23 — EXTERIOR WALLS
   - R-15/21 — BASEMENT WALLS (INTERIOR OR EXTERIOR)
   - R-15 (RIGID) — CONCRETE FLOOR SLAB EDGES AT PERIMETER UNDER HEATED AREAS.
   - R-8 — EXPOSED FURNACE DUCTS IN UNHEATED AREAS

3. GLAZING/DOORS:
   - NO LIMITS — WINDOW AREA LIMIT
   - U=.35 — WINDOW CLASS
   - U=.54 — ENTRY DOOR CLASS (24 SQ. FT. MAX.)
   - U=.40 — FULL LIGHT GLASS DOOR CLASS
   - U=.20 — OTHER DOORS (50% MAX. GLAZING.)
   - U=.60 — SKYLIGHT CLASS (2% MAX. OF HEATED SPACE)

4. ALL AIR INFILTRATIONS IN THE EXTERIOR ENVELOPE SHALL BE SEALED INCLUDING WINDOW AND DOOR FRAMES, WALLS, FOUNDATIONS, VENTING AND UTILITY PENETRATIONS. ACCESS DOORS TO CRAWL SPACE AND ATTIC AREAS TO HAVE THE SAME EQUIVALENT RATING OF THE WALL, FLOOR OR CEILING THOUGH WHICH THEY PENETRATE.

5. PROVIDE AN APPROVED INSULATION VAPOR BARRIER WITH A ONE PERM DRY CUP RATING OR LESS AND TO BE INSTALLED ON THE WARM SIDE OF THE INSULATION.

6. INSULATE ALL ACCESS DOOR/HATCHES TO CRAWL SPACES AND ATTICS TO THE EQUIVALENT RATING OF THE WALL, FLOOR OR CEILING THROUGH WHICH THEY PENETRATE.

7. ALL EXPOSED INSULATION IS TO HAVE A FLAME SPREAD RATING NOT TO EXCEED 25. A SMOKE-DEVELOPED FACTOR NOT TO EXCEED 450 AND CRITICAL RADIANT FLUX NOT LESS THAN Ø12 WATTS PER SQUARE CENTIMETER.

MISCELLANEOUS:

1. EACH BEDROOM TO HAVE A MINIMUM WINDOW OPENING OF 5.7 SQ. FT. WITH A MINIMUM CLEARANCE WIDTH OF 20 INCHES AND A BOTTOM SILL HEIGHT LESS THEN 44 IN. ABOVE FINISHED FLOOR.

2. ALL EXTERIOR WINDOWS ARE TO BE DOUBLE GLAZED AND ALL EXTERIOR DOORS ARE TO BE SOLID CORE WITH WEATHER STRIPPING. PROVIDE 1/2" DEAD BOLT LOCKS ON ALL EXTERIOR DOORS. PROVIDE PEEP HOLES @ 54"-64" ABOVE FINISHED EXT. DOOR FLOOR.

3. WINDOW MUST MEET THE U-VALUE OR CLASS REQUIREMENT FOR THE APPROPRIATE ENERGY PATH AND BE LABELED ACCORDINGLY. SITE BUILT WINDOWS MAY BE USED PROVIDED THEY MEET THE CRITERIA AS OUTLINED IN 2021 ORSC SEC N1111.4

4. WINDOWS ARE TO BE TEMPERED IF THEY ARE WITHIN 18 INCHES OF THE FLOOR, WITHIN A 24 INCH ARCH OF ANY DOOR IN A CLOSED POSITION, GLAZING USED IN RAILINGS, GLAZING IN FIXED OR SLIDING DOORS, WHERE THE BOTTOM EDGE IS WITHIN 60 INCHES ABOVE STAIRS, HOT TUBS, BATHTUBS, WHIRLPOOLS, AND/OR SHOWERS.

5. SKYLIGHTS ARE TO BE GLAZED WITH TEMPERED GLASS ON OUTSIDE AND LAMINATED GLASS ON INSIDE UNLESS PLEXIGLASS. GLASS TO HAVE A MAXIMUM CLEAR SPAN OF 25 INCHES. SKYLITE FRAME IS TO BE ATTACHED TO A 2 X CURB AND TO BE 4 INCHES MINIMUM ABOVE ROOF PLANE. MIN 25LBS. PSF SNOW LOAD ADDITIONAL

6. ALL TUB AND SHOWER ENCLOSURE DOORS TO BE GLAZED WITH SAFETY GLASS.

7. BATHROOMS AND UTILITY ROOMS ARE TO BE VENTED DIRECTLY TO THE OUTSIDE VIA METAL DUCTING WITH A FAN CAPABLE OR PRODUCING A MINIMUM OF 5 AIR EXCHANGES PER HOUR (90 CFM. MIN.). DRYER AND RANGE HOODS ARE ALSO TO BE VENTED TO THE OUTSIDE. VENTS TO BE PROVIDED WITH BACK-DRAFT DAMPERS.

8. SMOKE DETECTORS SHALL BE INSTALLED IN EACH BEDROOM AND OUTSIDE THE IMMEDIATE VICINITY OF EACH BEDROOM AREA AND ON EACH STORY OF THE DWELLING. ALL DETECTORS SHALL BE INTERCONNECTED TO MAIN POWER SOURCE AS THE PRIMARY POWER AND BATTERY BACKUP AS SECONDARY POWER. ACTUATION OF ONE ALARM WILL ACTIVATE ALL THE ALARMS AND WILL BE AUDIBLE IN ALL BEDROOMS.

9. ELECTRICAL RECEPTACLES IN BATHROOMS, KITCHENS, EXTERIOR LOCATIONS AND GARAGES SHALL BE G.F.I.C. PER NATIONAL ELECTRICAL CODE REQUIREMENTS.

10. RECESSED LIGHT FIXTURES ARE NOT PERMITTED IN ANY INSULATED CAVITY UNLESS THE FIXTURES ARE LABELED AS BEING SUITABLE (I.C. LABEL) FOR DIRECT CONTACT WITH INSULATION.

11. ALL DOORS BETWEEN GARAGE AND LIVING AREAS SHALL BE ONE-HOUR FIRE RATED ASSEMBLIES WITH 1-3/4" SOLID CORE DOOR OR CODE APPROVED EQUAL WITH A SELF-CLOSING MECHANISM.

12. USE 1/2" GYPSUM BOARD IN HOUSE WALLS AND CEILINGS AND UNDER STAIRS. USE 5/8" TYPE 'X' GYPSUM BD. ON WALLS AND CEILINGS BETWEEN GARAGE AND LIVING AREAS. PROVIDE 1/2" WATERPROOF GYPSUM BD. ABOVE ALL SHOWER AND TUB/SHOWER AND TUB/SHOWER UNITS AND IN ANY WATER SPLASH AREAS.

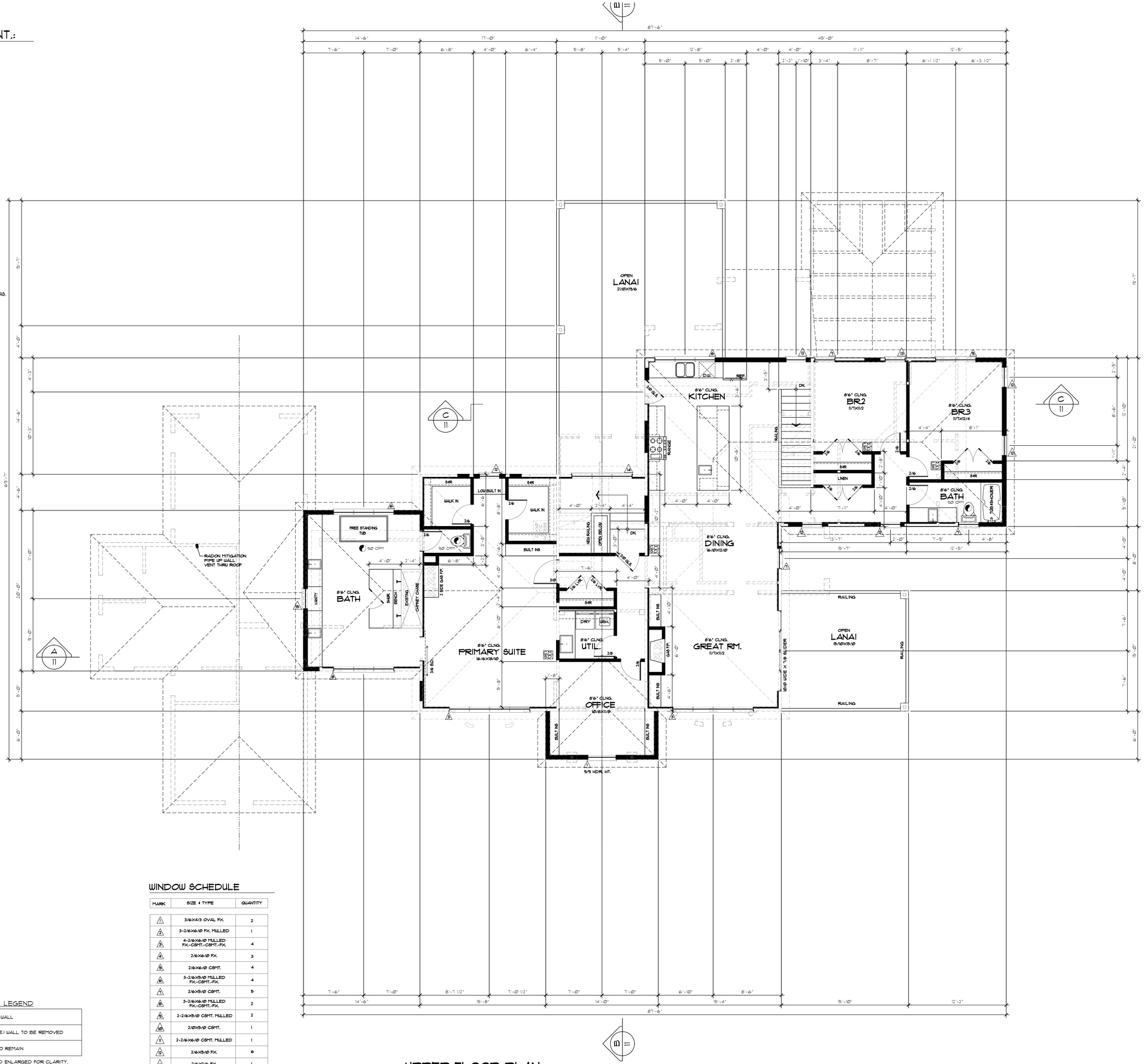
13. ALL FIREPLACE OPENINGS SHALL HAVE TEMPERED GLASS DOORS. PROVIDE OUTSIDE COMBUSTION AIR VENTS (WITH SCREENS AND BACK DAMPER) FOR FIREPLACES, WOOD STOVES AND ANY APPLIANCES WITH OPEN FLAME.

14. APPLIANCES PRODUCING A SPARK, GLOW OR FLAME CAPABLE OF IGNITING FLAMMABLE VAPORS SHALL NOT BE INSTALLED IN A GARAGE UNLESS THE PILOTS, BURNERS, HEATING ELEMENTS OR SWITCHES ARE AT LEAST 18 INCHES ABOVE THE FLOOR.

15. PROVIDE 80% MIN. EFFICIENT NATURAL GAS FURNACE WITH BACKDRAFT DAMPER AND NATURAL GAS HOT WATER HEATER WITH BACKDRAFT DAMPER. PRIVIDE R-4 INSULATION AROUND HOT WATER LINES IN UNHEATED AREAS. ELEVATE FLAME IN UNITS 18" ABOVE FINISH FLOOR.

16. ALL WINDOW HDRS TO BE 4 X 10, U.N.O.

17. FRONT PORCH TO BE CONCRETE SLAB, U.N.O.



WINDOW SCHEDULE

MARK	SIZE & TYPE	QUANTITY
1	3/6X4/3 OVAL FX.	2
2	3-2/6X6/0 FX. MULLED	1
3	4-2/6X6/0 MULLED FX.-CSMT.-CSMT.-FX.	4
4	2/6X6/0 FX.	3
5	2/6X6/0 CSMT.	4
6	3-2/6X3/0 MULLED FX.-CSMT.-FX.	4
7	2/6X3/0 CSMT.	5
8	3-2/6X6/0 MULLED FX.-CSMT.-FX.	2
9	2-2/6X3/0 CSMT. MULLED	2
10	2/8X3/0 CSMT.	1
11	2-2/6X6/0 CSMT. MULLED	1
12	2/6X3/0 FX.	6
13	2/6X2/6 FX.	1
14	3-2/6X5/0 FX. MULLED	1
15	2/6X2/0 FX.	1

NOTE: ALL WINDOWS TO HAVE GRIDS U.N.O.

WALL LEGEND

- NEW (N) 2x WALL
- EXISTING (E) WALL TO BE REMOVED
- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

ALL DIMENSIONS TO OR FROM (E) STRUCTURE ARE FOR REFERENCE ONLY. CONTRACTOR TO FIELD VERIFY ALL DIMENSIONS AND IS RESPONSIBLE TO CONTACT DESIGNER W/ANY DISCREPENCIES.

IMPORTANT DISCLOSURE - PLEASE READ:

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UPPER FLOOR PLAN

2,054 SQ. FT. EXISTING
2,402 SQ. FT. UPPER TOTAL
348 SQ. FT. NEW ADDITION

1/4"=1'-0"

FOWLER HOME + DESIGN

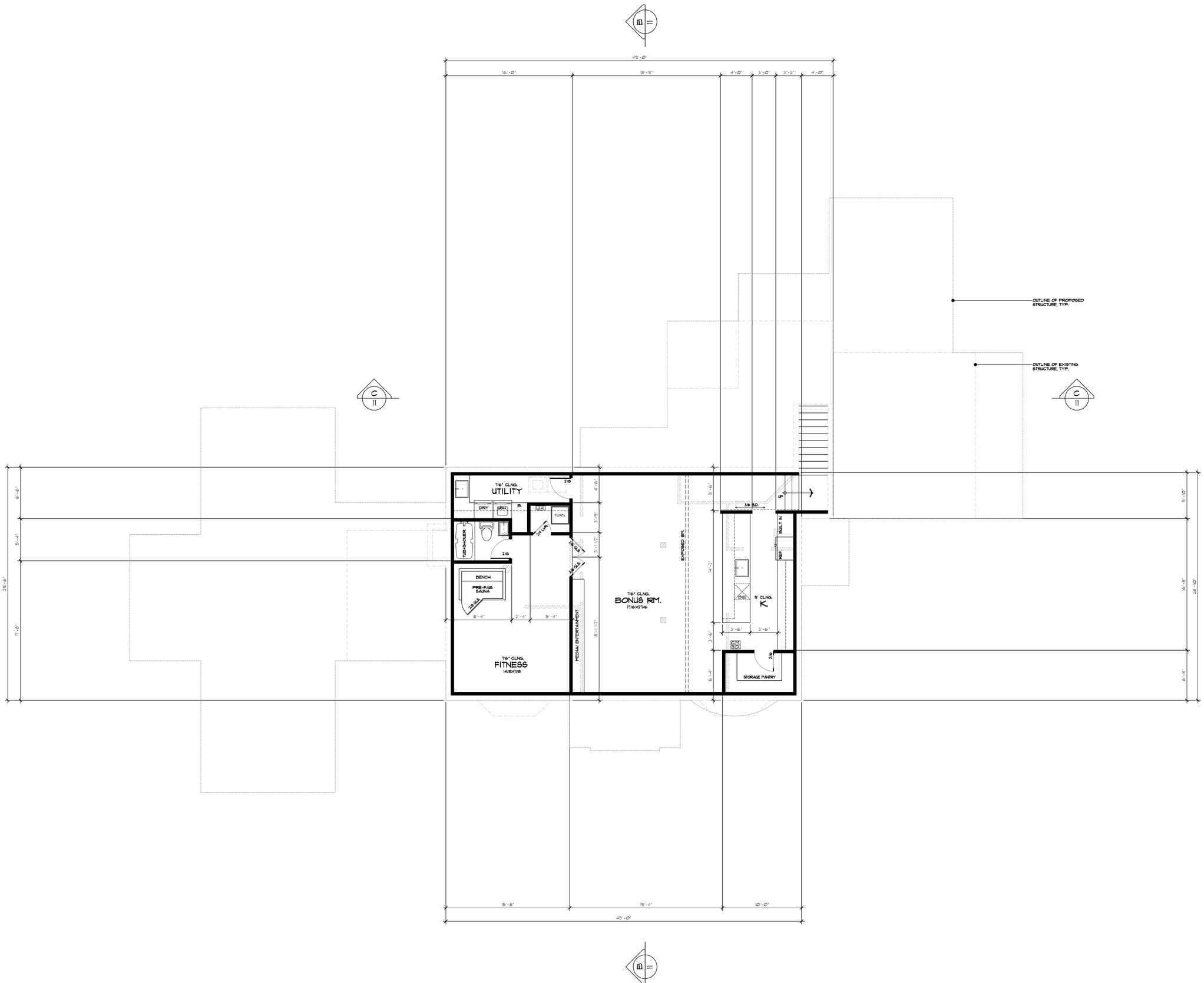
THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 4/20/2024
SCALE: 1/4"=1'-0"
FILE:

UPPER FLOOR

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LOWER FLOOR PLAN

1,226 SQ. FT. EXISTING

1/4" = 1'-0"

WALL LEGEND

	- NEW (N) 2x WALL
	- EXISTING (E) WALL TO BE REMOVED
	- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

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FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

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FILE:

LOWER FLOOR

6

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FOUNDATION NOTES:

1. FOUNDATION FOOTINGS, CONT. FOOTING UNDER PONYWALL TO BEAR ON UNDISTURBED SOIL WITH MINIMUM DEPTH OF BOTTOM OF FOOTING TO BE 18" BELOW FINAL GRADE. SOIL BEARING PRESSURE ASSUMED TO BE 1500 PSF.
2. ALL EXCESS FRAMING MATERIAL TO BE EXPORTED FROM THIS SITE TO AN APPROVED DISPOSAL LOCATION.
3. EXCAVATE SITE TO PROVIDE A MINIMUM OF 18" CLEARANCE UNDER ALL GIRDERS.
4. CLEAN ALL FOOTING EXCAVATIONS OF LOOSE AND ORGANIC MATERIALS.
5. MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
6. DO NOT BACKFILL FOUNDATION WALLS UNTIL MAIN FLOOR INCLUDING SUB-FLOORING AND WALL DIAPHRAGMS ARE IN PLACE AND FULLY NAILED AND ANCHORED AND FOUNDATION WALLS HAVE BEEN CAST AND CURED.
7. CONCRETE:

BASEMENT AND FOUNDATIONS WALLS AND FOOTINGS NOT EXPOSED TO WEATHER.	6 SACK/YD.	4" MAX. SLUMP	3000 PSI
BASEMENT AND INTERIOR SLABS ON GRADE.	6 SACK/YD.	4" MAX. SLUMP	3000 PSI
BASEMENT AND INTERIOR SLABS ON GRADE.	6 SACK/YD.	4" MAX. SLUMP	3000 PSI
BASEMENT WALLS, FOUNDATIONS AND FOOTINGS EXPOSED TO WEATHER.	6 SACK/YD.	4" MAX. SLUMP	3000 PSI
PORCHES, STEPS, CARPORT AND OTHER EXTERIOR SLABS DIRECTLY EXPOSED TO WEATHER. 5% - 7% MAX. AIR ENTRAINED.	7 SACK/YD.	4" MAX. SLUMP	3500 PSI

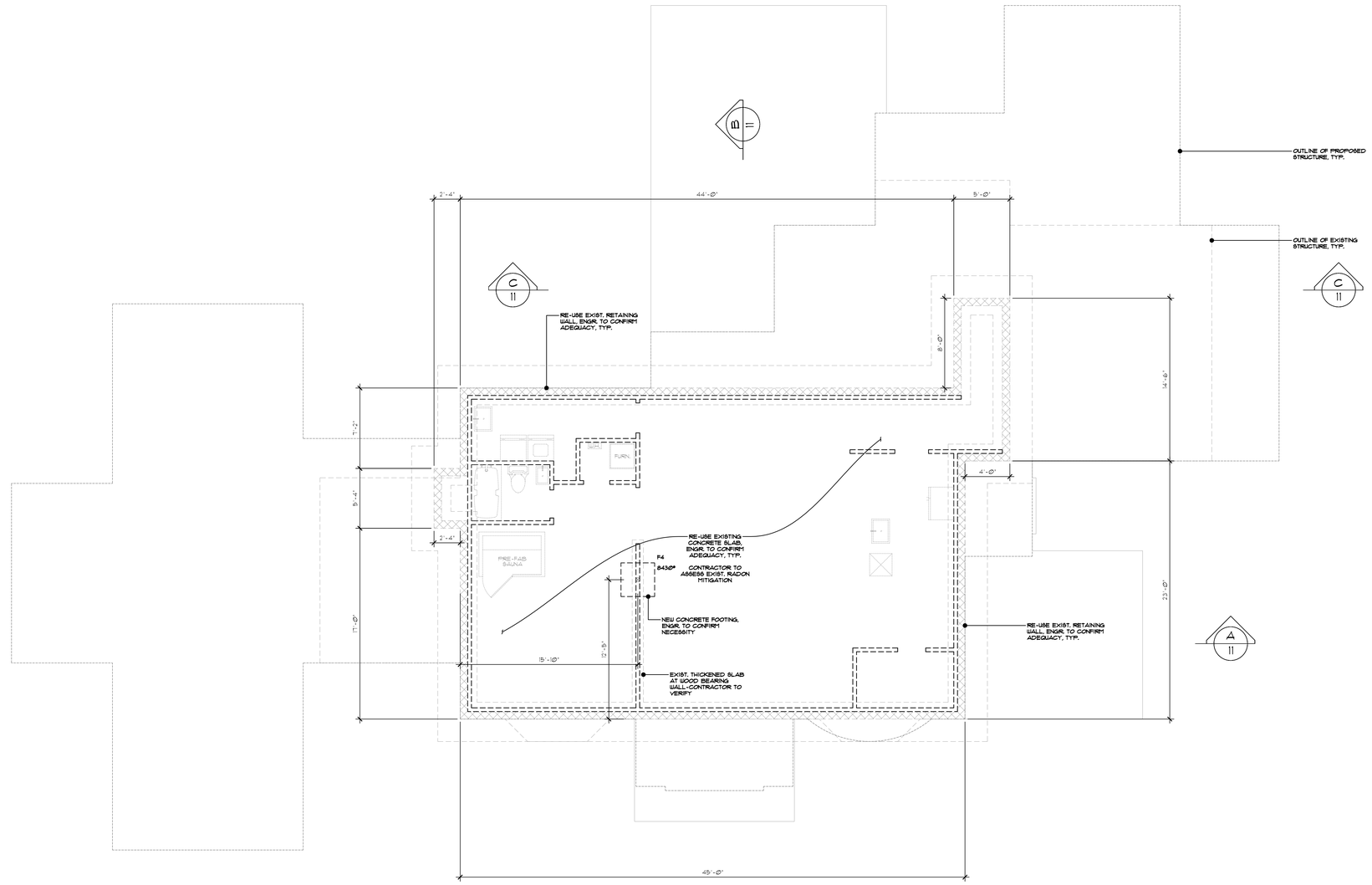
8. ALL CONCRETE SHALL DEVELOPE A MINIMUM COMPRESSIVE STRENGTH AT 28 DAYS.
9. ALL CONCRETE FORMS, SHORING AND POURING METHODS SHALL CONFORM TO CURRENT A.C.I. STANDARDS.
10. ALL FOUNDATIONS TO BE 8" CONCRETE WALLS ON 16" X 8" MIN. CONCRETE FOOTINGS REFER TO FOUNDATION PLAN FOR ADDITIONAL REQUIREMENTS. ALL FOUNDATIONS OVER 48" HIGH REQUIRE TO BE ENGINEERED CONCRETE WALLS AND FOOTINGS.
11. ALL FILL UNDER GRADE SUPPORTED SLABS TO BE A MINIMUM OF 4" GRANULAR MATERIAL (3/4"-0") COMPACTED TO 95% MINIMUM.
12. CONCRETE SLABS TO HAVE TOOLED CONTROL JOINTS AT 15 FT. MAXIMUM INTERVALS EACH WAY.
13. CONCRETE SIDEWALKS TO HAVE 3/4" TOOLED JOINTS AT 5 FT. O.C. MINIMUM.
14. PROVIDE (5) 18" X 8" CLOSEABLE SCREENED FOUNDATION AIR VENTS WITH 1/8" CORROSION RESISTANT SCREENED WIRE MESH. SPACE WITHIN 36" OF OUTSIDE CORNERS AND EQUALLY DISTRIBUTED AROUND PERIMETER OF CRAWLSPACE. (A MINIMUM OF ONE (1) SQUARE FOOT OF VENTILATION AREA FOR EACH 150 SQ. FT. OF CRAWL AREA REQUIRED.).
15. PROVIDE 1/2" DIA. X 10" ANCHOR BOLTS A307 GRADE @ 6'-0" O.C. U.N.O. ON PRESSURE TREATED DF NO. 3 MUD SILLS. ANCHOR BOLTS TO BE 7" MINIMUM EMBEDMENT INTO CONCRETE WALLS. AT LEAST TWO (2) BOLTS ARE REQUIRED ON EACH SILL AND 12" MINIMUM FROM SILL SPLICES. PROVIDE FOAM INSUL. BTWN SILL PL. & FOUND. WALL
16. REFER TO SIMPSON SPECIFICATIONS FOR BOLT DIAMETER AND MINIMUM EMBEDMENT LENGTH ON ALL ANCHOR BOLTS AND SIMPSON STRAP-TIE HOLDOWNS.
17. REBAR SCHEDULE:

    REBAR TO BE LOCATED AT HOLDOWN LOCATIONS ONLY OR AS SHOWN ON PLAN OR REQUIRED BY CODE.

    MINIMUM REQUIREMENTS WHERE REBAR IS REQUIRED.

    FOOTINGS: (1) #4 BAR HORIZONTAL CONTINUOUS, 4" CLEAR BOTTOM.

    FOUNDATIONS: (1) #4 BAR TOP HORIZONTAL WITH #4 BARS VERTICAL AT 48" O.C. HOOKED AND TIED TO FOOTING BARS AND TIED TO TOP FOUNDATION BAR.
18. REINFORCING BARS TO BE DEFORMED BARS CONFORMING TO A.S.T.M. A-615 GRADE 60. WELDED WIRE MESH TO BE A-185.
19. REINFORCEMENT SHALL BE ACCURATELY PLACED AND SUPPORTED BY CONCRETE, METAL, OR OTHER APPROVED CHAIRS, SPACERS, OR TIES AND SECURE AGAINST DISPLACEMENT DURING CONCRETE PLACEMENT.
20. REINFORCEMENT SHALL BE BENT COLD AND SHALL NOT BE WELDED.
21. ALL LAPS AND SPLICES ON #4 REBAR TO BE 24" MINIMUM, U.N.O.
22. 'STTB' ANCHOR BOLTS TO BE INSTALLED PER MANUF. PRIOR TO POURING FOOTINGS.
23. EXTEND HEIGHT TO FRONT GARAGE CONCRETE STEM WALLS SO THE TOP OF WALL TO TOP OF GARAGE DOOR HEADER DOES NOT EXCEED 8'-0" MAX.
24. GARAGE FLOOR TO BE 4" 3500 PSI MINIMUM CONCRETE SLAB ON 4" MINIMUM CLEAN COMPACTED FILL WITH A 2" SLOPE (1/8" PER FT. MIN.) TOWARD OPENING AS REQUIRED FOR DRAINAGE. PROVIDE TOOLED CONTROL JOINTS AT APPROXIMATELY 10FT. O.C. EA. WAY.
25. PROVIDE (1) MIN. 3" DIA. X 36" HIGH STEEL PROTECTIVE POST IN FRONT OF FURNACE AND HOT WATER HEATER IN A 12" DIA. X 24" DEEP CONCRETE FOOTING. (INSTALL IF REQUIRED FOR PROTECTION FROM CARS). SEE DET. 8/D1
26. PROVIDE BLOCK OUTS FOR DRYER VENTS AND 18" X 18" BLOCK OUT AT FOUNDATION WALL FOR MECH. PLENUM. VERIFY SIZE AND PLACEMENT WITH BUILDER/ AND OR SUBCONTRACTORS PRIOR TO INSTALL.
27. PROVIDE A 3" DIA. PVC PIPE IN FOUNDATION WALL FOR ELECTRICAL SERVICE. VERIFY PLACEMENT WITH WITH BUILDER/ SUBCONTRACTOR.
28. PROVIDE A 4" DIA. PVC LOW POINT CRAWL SPACE DRAIN THROUGH FOUNDATION WALL BLOCKOUT. DRAIN TO BE SLOPED FOR GRAVITY DRAINAGE AND CONNECTED TO AN APPROVED STORM DRAIN SYSTEM.
29. COVER ENTIRE CRAWL AREA WITH 6-MIL BLACK POLYETHYLENE VAPOR BARRIER AND EXTEND UP WALLS TO MUD SILLS. LAP SEAMS 12" MIN.
30. ALL WOOD IN CONTACT WITH CONCRETE TO BE PRESSURE TREATED AND/OR PROTECTED BY 55# FELT MOISTURE BARRIER.
31. ALL GIRDERS AND BEAM POCKETS TO HAVE A 1/2" AIR SPACE AT SIDE AND END WITH A 3" MIN BEARING ON CONCRETE PLACED ON A 55# ASPHALT SHINGLE.
32. ALL HOLDOWNS, JOIST HANGERS AND BEAM HANGERS TO BE 'SIMPSON' OR EQUAL.
33. PROVIDE A 24" X 36" CRAWL ACCESS (18"X24" MIN.) FROM OUTSIDE OR THROUGH FLOOR. PIPES, DUCTS AND OTHER CONSTRUCTION MUST NOT OBSTRUCT THE ACCESS.
34. FLOOR CONSTRUCTION TO BE:
    1 1/8" DECKING OR EQUAL ON I-JOISTS PER MANUF.
    ON 2X6 PONYWALLS OVER 8X16 CONTINUOUS FOOTINGS



FOOTING SCHEDULE

FTNG.	LOAD LBS	FOOTING SIZE	REBAR
F1	3,300#	18"X18"X10"	(2) #4 E/W
F2	6,000#	24"X24"X10"	(2) #4 E/W
F3	9,300#	30"X30"X10"	(3) #4 E/W
F4	13,500#	36"X36"X12"	(3) #4 E/W
F5	18,300#	42"X42"X12"	(4) #4 E/W
F6	24,000#	48"X48"X12"	(4) #4 E/W
F7	28,000#	52"X52"X12"	(5) #4 E/W
F8	40,000#	64"X64"X14"	(5) #4 E/W
F9	50,000#	72"X72"X16#	(6) #4 E/W

TOP OF ALL HOLD DOUN BOLTS MUST EXTEND ABOVE WASHERS AND NUTS (APPROX. 6" ABOVE TOP OF PNDN. WALL).

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SEE STRUC. ENGR. SHEETS

CONTRACTOR TO CONFIRM EXIST. CONDITIONS, & INFORM DESIGNER OF ANY DISCREPANCIES, TYP.

LOWER FLOOR FRAMING & FDN PLAN

1/4" = 1'-0"

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 4/20/2024
SCALE: 1/4" = 1'-0"
FILE:

FOUNDATION PLAN

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FOUNDATION NOTES:

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2. ALL EXCESS FRAMING MATERIAL TO BE EXPORTED FROM THIS SITE TO AN APPROVED DISPOSAL LOCATION.
3. EXCAVATE SITE TO PROVIDE A MINIMUM OF 18" CLEARANCE UNDER ALL GIRDERS.
4. CLEAN ALL FOOTING EXCAVATIONS OF LOOSE AND ORGANIC MATERIALS.
5. MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
6. DO NOT BACKFILL FOUNDATION WALLS UNTIL MAIN FLOOR INCLUDING SUB-FLOORING AND WALL DIAPHRAGM'S ARE IN PLACE AND FULLY NAILED AND ANCHORED AND FOUNDATION WALLS HAVE BEEN CAST AND CURED.
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8. ALL CONCRETE SHALL DEVELOPE A MINIMUM COMPRESSIVE STRENGTH AT 28 DAYS.
9. ALL CONCRETE FORMS, SHORING AND POURING METHODS SHALL CONFORM TO CURRENT A.C.I. STANDARDS.
10. ALL FOUNDATIONS TO BE 8" CONCRETE WALLS ON 16" X 8" MIN. CONCRETE FOOTINGS REFER TO FOUNDATION PLAN FOR ADDITIONAL REQUIREMENTS. ALL FOUNDATIONS OVER 48" HIGH REQUIRE TO BE ENGINEERED CONCRETE WALLS AND FOOTINGS.
11. ALL FILL UNDER GRADE SUPPORTED SLABS TO BE A MINIMUM OF 4" GRANULAR MATERIAL (3/4"-0") COMPACTED TO 95% MINIMUM.
12. CONCRETE SLABS TO HAVE TOOLED CONTROL JOINTS AT 15 FT. MAXIMUM INTERVALS EACH WAY.
13. CONCRETE SIDEWALKS TO HAVE 3/4" TOOLED JOINTS AT 5 FT. O.C. MINIMUM.
14. PROVIDE (5) 18" X 8" CLOSEABLE SCREENED FOUNDATION AIR VENTS WITH 1/8" CORROSION RESISTANT SCREENED WIRE MESH. SPACE WITHIN 36" OF OUTSIDE CORNERS AND EQUALLY DISTRIBUTED AROUND PERIMETER OF CRAWLSPACE. (A MINIMUM OF ONE (1) SQUARE FOOT OF VENTILATION AREA FOR EACH 150 SQ. FT. OF CRAWL AREA REQUIRED.)
15. PROVIDE 1/2" DIA. X 10" ANCHOR BOLTS A307 GRADE @ 6'-0" O.C. U.N.O. ON PRESSURE TREATED DF NO. 2 MUD SILLS. ANCHOR BOLTS TO BE 7" MINIMUM EMBEDMENT INTO CONCRETE WALLS. AT LEAST TWO (2) BOLTS ARE REQUIRED ON EACH SILL AND 12" MINIMUM FROM SILL SPLICES. PROVIDE FOAM INSUL. BTWN SILL PL. & FOUND. WALL
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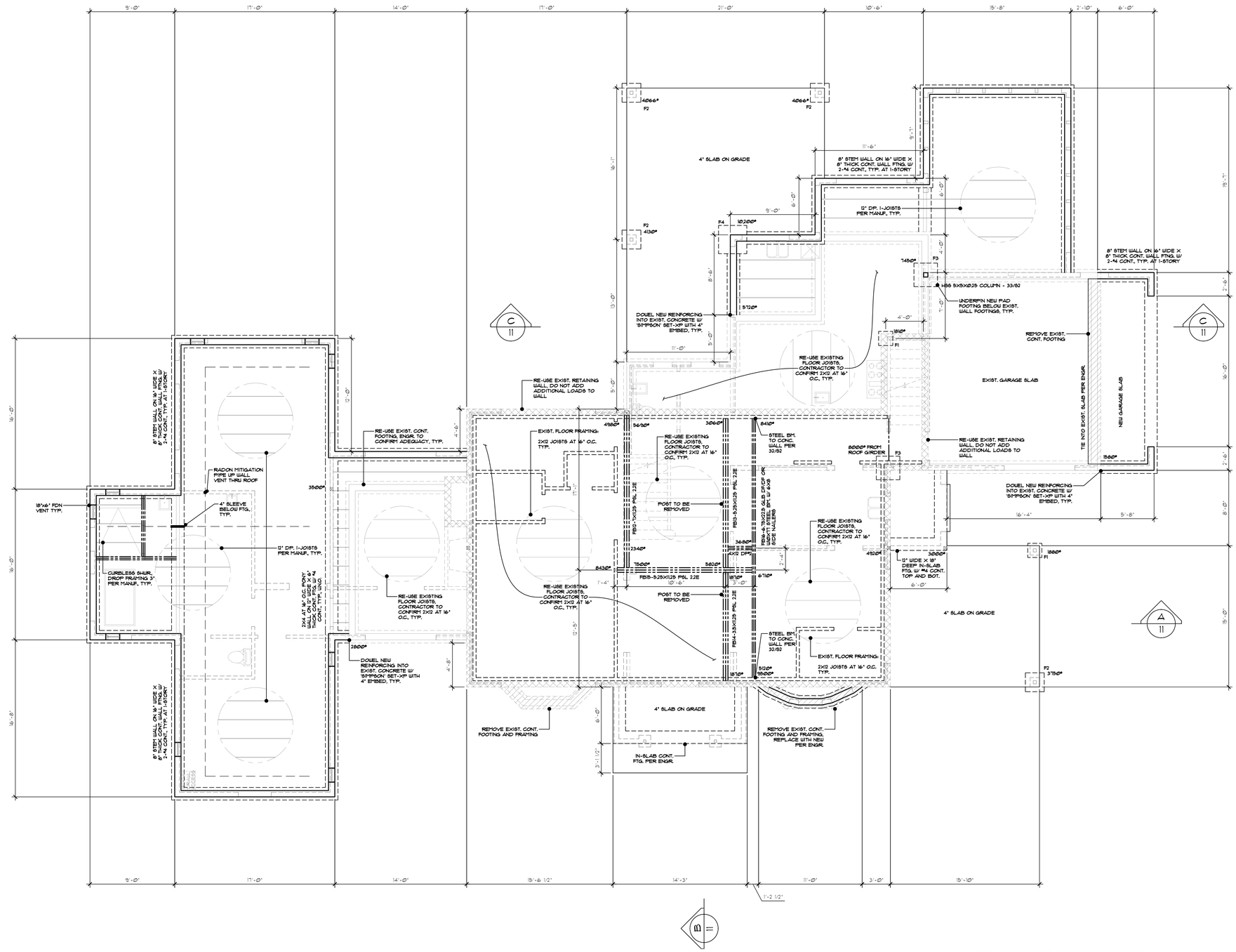
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24. GARAGE FLOOR TO BE 4" 3500 PSI MINIMUM CONCRETE SLAB ON 4" MINIMUM CLEAN COMPACTED FILL WITH A 2" SLOPE (1/8" PER FT. MIN.) TOWARD OPENING AS REQUIRED FOR DRAINAGE. PROVIDE TOOLED CONTROL JOINTS AT APPROXIMATELY 10FT. O.C. EA. WAY.
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26. PROVIDE BLOCK OUTS FOR DRYER VENTS AND 18" X 18" BLOCK OUT AT FOUNDATION WALL FOR MECH. PLENUM. VERIFY SIZE AND PLACEMENT WITH BUILDER/ AND OR SUBCONTRACTORS PRIOR TO INSTALL.
27. PROVIDE A 3" DIA. PVC PIPE IN FOUNDATION WALL FOR ELECTRICAL SERVICE. VERIFY PLACEMENT WITH WITH BUILDER/ SUBCONTRACTOR.
28. PROVIDE A 4" DIA. PVC LOW POINT CRAWL SPACE DRAIN THROUGH FOUNDATION WALL BLOCKOUT. DRAIN TO BE SLOPED FOR GRAVITY DRAINAGE AND CONNECTED TO AN APPROVED STORM DRAIN SYSTEM.
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33. PROVIDE A 24" X 36" CRAWL ACCESS (18"X24" MIN.) FROM OUTSIDE OR THROUGH FLOOR, PIPES, DUCTS AND OTHER CONSTRUCTION MUST NOT OBSTRUCT THE ACCESS.
34. FLOOR CONSTRUCTION TO BE:
    1 1/8" DECKING OR EQUAL ON I-JOISTS PER MANUF.
    ON 2x6 PONYWALLS OVER 8X16 CONTINUOUS FOOTINGS

FDN VENTILATION CALCULATIONS:

VENTILATION REQUIRED IN CRAWL SPACE AREA:
1348 SQ. FT. X 144 SQ. IN. - 1/150 = 1293 TOTAL SQ. IN. REQUIRED

LOCATION:	REQ. SQ. IN.	NO. OF VENTS:	VENT SIZE:	TOTAL SQ. IN.:
FDN.	1293	9	108 sq/in.	972

TOP OF ALL HOLD DOWN BOLTS MUST EXTEND ABOVE WASHERS AND NUTS (APPROX. 6" ABOVE TOP OF FNDN. WALL.)



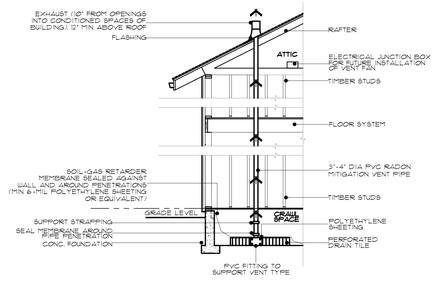
FOOTING SCHEDULE

FTNG.	LOAD LBS	FOOTING SIZE	REBAR
F1	3,300#	18"X18"X10"	(2) #4 E/W
F2	6,000#	24"X24"X10"	(2) #4 E/W
F3	9,300#	30"X30"X10"	(3) #4 E/W
F4	13,500#	36"X36"X12"	(3) #4 E/W
F5	18,300#	42"X42"X12"	(4) #4 E/W
F6	24,000#	48"X48"X12"	(4) #4 E/W
F7	28,000#	52"X52"X12"	(5) #4 E/W
F8	40,000#	64"X64"X14"	(5) #4 E/W
F9	50,000#	72"X72"X16#	(6) #4 E/W

MAIN FLOOR FRAMING & FDN PLAN

1/4"=1'-0"

SUB-MEMBRANE DEPRESSURIZATION SYSTEM FOR CRAWL SPACE



RADON CONTROL METHOD C.

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SEE STRUC. ENGR. SHEETS

SEE JOIST ENGR. SHEETS FROM MANUF.

CONTRACTOR TO CONFIRM EXIST. CONDITIONS, & INFORM DESIGNER OF ANY DISCREPANCIES, TYP.

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
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FILE:

MAIN FL. FRAMING & FDN PLAN

8

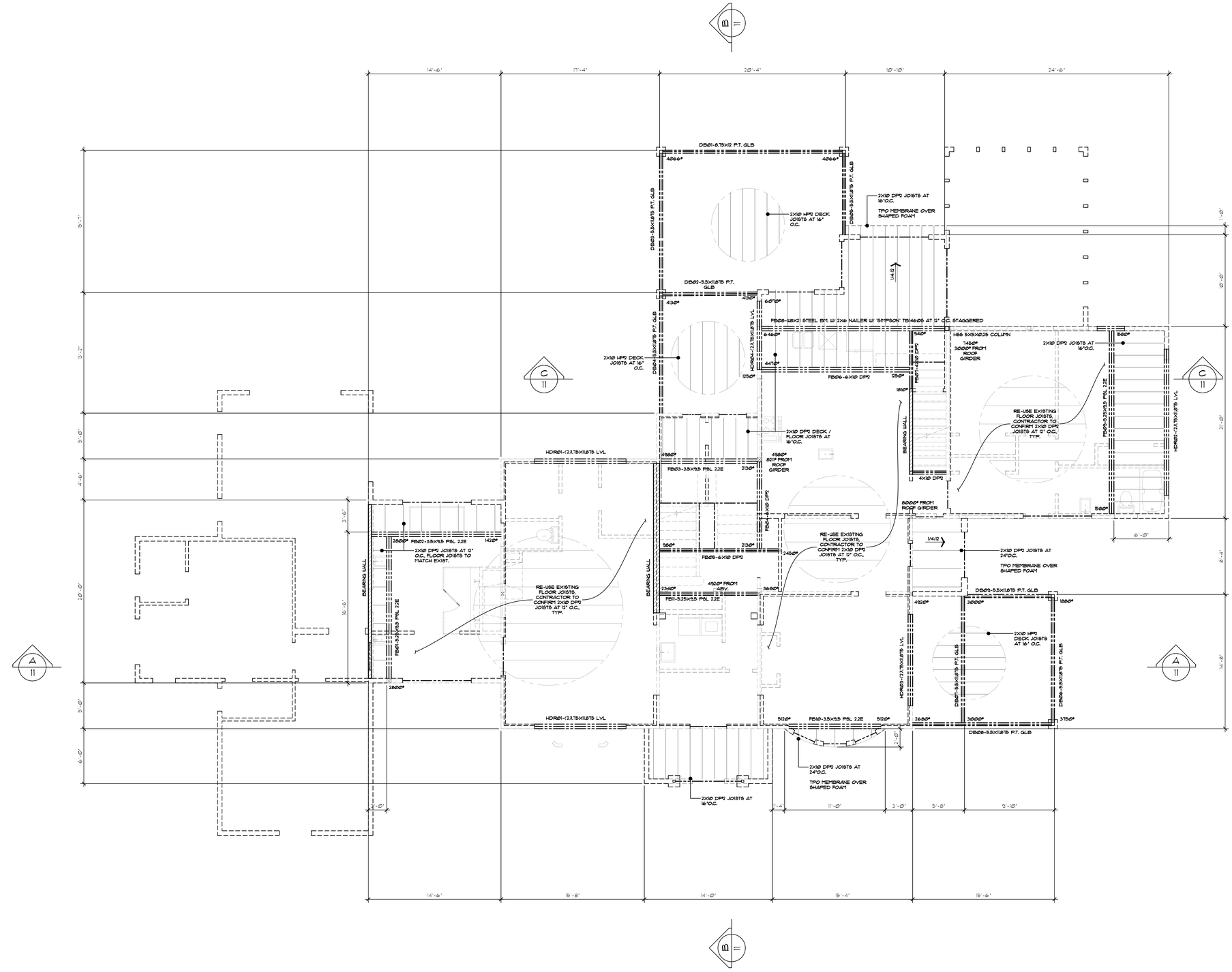
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FLOOR FRAMING NOTES:

1. SEE FLOOR JOIST OR TRUSS MANUF. SHEETS.
2. FLOOR JOIST SPANS ARE BASED ON A 40# L.L. + 15# D.L. + 55# T.L. DEFLECTION LIMITED
3. PROVIDE BLOCK OUTS FOR DOWN DRAFT COOK TOPS, DRYER VENTS, MECH. FLUES, AND ACCESSES. VERIFY SIZE AND PLACEMENT WITH BUILDER/ SUBCONTRACTORS PRIOR TO INSTALL.
4. ALL WOOD IN DIRECT CONTACT WITH CONCRETE TO BE PRESSURE TREATED AND/OR PROTECTED BY 55# FELT MOISTURE BARRIER.
5. ALL GIRDERS IN CONCRETE BEAM POCKETS TO HAVE A 1/2" AIR SPACE AT SIDES AND ENDS WITH A 3" MIN. BEARING ON CONCRETE PLACED ON A 55# FELT MOISTURE BARRIER.
6. ALL HOLDOWNS, JOIST HANGERS AND BEAM HANGERS TO BE 'SIMPSON' OR EQUAL.
7. REFER TO BOISE CASCADE TECHNICAL SUPPORT FOR BEAMS & HEADER HANGERS.
8. PROVIDE SOLID BLOCKING UNDER ALL UPPER LEVEL BEARING WALLS OR AS SHOWN ON PLAN.
9. PROVIDE A CONTINUOUS RIM JOIST AROUND PERIMETER OF EXTERIOR WALLS. RIM JOIST TO BE OF THE SAME SIZE AND MATERIAL TYPE AS FLOOR JOISTS UNLESS OTHERWISE NOTED. FASTEN RIM JOISTS TO WALL BELOW WITH AT LEAST 16D TOE-NAILS AT 8" O.C.
10. PROVIDE 1 1/8" T 4 G CDX (APA 32/16) PLYWOOD OR APPROVED EQUAL SUB-FLOOR SHEATHING. GLUE AND FASTEN SHEATHING WITH 10D COMMON NAILS AT 6" O.C. AT ALL EDGES AND 10D COMMON NAILS AT 12" O.C. AT ALL INTERMEDIATE FRAMING MEMBERS.
11. SUB-FLOOR SHEATHING TO EXTEND OUTWARD TO ALL PERIMETER EXTERIOR WALLS BELOW.
12. VERIFY LOCATION OF ALL PLUMBING DRAINS AND OFFSET FLOOR JOISTS UP TO 3" O.C. MAXIMUM TO AVOID NOTCHING AND CUTTING OF JOISTS.
13. BEARING FOR JOISTS, SUPPORT MEMBERS, HEADERS AND BEAMS TO BE 1/2 THE MEMBERS WIDTH AND SOLID BEARING TO FOOTINGS. 2 X JOISTS TO HAVE 1-1/2" MIN. BEARING.
14. DO NOT NOTCH, BORE OR DRILL THROUGH ANY SUPPORT COLUMNS, GIRDERS, BEAMS, JOIST SUPPORTING BEARING WALLS OR ANY OTHER CONCENTRATED LOAD BEARING MEMBER UNLESS SPECIFICALLY NOTED ON PLANS. CONTACT DESIGNER IF QUESTIONS ARISE.
15. PROVIDE DOUBLE RIM JOISTS AT ALL EXTERIOR WALLS PARALLEL TO JOISTS AND AS SHOWN ON PLAN.
16. LAP FLOOR JOISTS A MINIMUM OF 6" EACH WAY AT ALL INTERIOR BEARING MEMBERS. NAIL LAPS WITH (3) 16D AND TO BEARING MEMBER WITH (3) 16D.
17. JOISTS SHALL BE SUPPORT LATERALLY BY BLOCKING OR BRIDGING AT JOIST MID-SPAN AT INTERVALS NOT EXCEEDING 10 FEET.

SYMBOLS LEGEND:

- ⊠ — DENOTES (2) CRIPPLE STUDS (2x WIDTH OF WALL) U.N.O.
- B — BEAM SCHEDULE CALLOUT.
- BEARING WALL DETAIL.
- 1 / D1 — DETAIL CALLOUT OVER SHEET #.
- 4X10 HEADER (U.N.O.)



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SEE STRUC. ENGR. SHEETS

CONTRACTOR TO CONFIRM EXIST. CONDITIONS, & INFORM DESIGNER OF ANY DISCREPANCIES, TYP.

UPPER FLOOR FRAMING PLAN

1/4" = 1'-0"

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
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UPPER FL. FRAMING PLAN

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ROOF FRAMING NOTES:

1. ROOFING MATERIAL TO BE 15# STANDING SEAM METAL ROOF AND ARCHITECTURAL COMPOSITION ROOFING WITH RAIN AND ICE SHIELD. NAILING PER MANUFACTURED INSTRUCTIONS FOR AN 80 MPH MIN. WIND AREA.
2. ROOF PITCH AS SHOWN ON PLAN.
3. ROOF DESIGN TO BE MANUFACTURED ROOF TRUSSES @ 24" O.C., U.N.O. MANUFACTURER TO SUPPLY DESIGN, ENGINEERING SPECIFICATIONS AND LAYOUT.
4. MANUFACTURED TRUSSES SHALL BE LATERALLY BRACED ACCORDING TO APPROPRIATE MANUFACTURE'S ENGINEERED DESIGN.
5. TRUSS MEMBERS SHALL NOT BE NOTCHED, BORED, DRILLED THROUGH OR ALTERED UNLESS DESIGNED BY AND SHOWN ON MANUFACTURERS SPECIFICATIONS.
6. ALL RAFTERS4 CEILING JOISTS TO BE 2 X DF-L #2 OR BETTER AS PER TABLE NOTED BELOW AND PER ROOF FRAMING PLAN. SPAN DISTANCE BASED ON SIMPLE UNIFORM LOADING AND PER O.R.S.C. 2011 TABLES R802.4(2) & R802.5(1/3).
7. ALL HIPS, VALLEYS AND RIDGES TO BE NOT LESS IN DEPTH THAN THE CONNECTION END OF THE RAFTER, U.N.O.
8. ALL PLANT-ON VALLEYS TO BE 2 X 10 WITH (2) 16D AT EACH RAFTER/TRUSS.
9. ALL EAVE OVERHANGS TO BE CLOSED TYPE AT 24". ALL CORNICE TO BE 12", U.N.O.
10. EAVES TO BE OPEN TYPE SOFFITS WITH A 5" 'K' GALVANIZED FACIA GUTTER ON A 2 X 10 FACIA BD., U.N.O. AND 3" GALVANIZED DOWNSPOUTS (DS) AS SHOWN ON PLAN.
11. ALL BARGE RAFTERS TO BE 2 X 10 WITH A 1 X 3 BRICK MOLD U.N.O.
12. ALL RAFTER HANGERS SHALL BE OF 'SIMPSON' L66U OR LU5 TYPE, U.N.O.
13. PROVIDE (21) 61 SQ. IN. SCREENED ATTIC AIR VENTS AT RIDGE WITH 1/8" CORROSION RESISTANT SCREENED MESH AND EQUALLY SPACED AS SHOWN ON PLAN. PROVIDE (63) 20 SQ. IN. 2' X 10" SCREENED AIR VENTS AT EAVES WITH 1/8" CORROSION RESISTANT SCREENED MESH AND EQUALLY SPACED. A MINIMUM OF ONE (1) SQUARE FOOT OF VENTILATION AREA FOR EACH 150 SQ. FT. OF ATTIC SPACE AREA REQUIRED. PROVIDE 50 PERCENT AT RIDGE AND 50 PERCENT AT EAVES. REFER TO ATTIC VENTILATION CALCULATION TABLE.
15. PROVIDE POSITIVE VENTILATION AT EACH END OF EACH RAFTER/TRUSS BAY AT VAULTED CEILING AREAS. INSTALL INSULATION BAFFLES AT EACH EAVE VENT BETWEEN BAYS. BAFFLES SHALL BE MADE RIGID, WEATHER RESISTANT MATERIAL AND MAINTAIN 1" CLEAR AIR SPACE. VENTILATION IS ALSO REQUIRED AT BLOCKING LOCATIONS ABOVE PLATES.
16. ROOF DIAPHRAM TO BE CONSTRUCTED WITH 15/32" EXPOSURE 1, C-D (APA 24/0 RATED) PLYWOOD OR 1/2" 2-M-W OR 2-M-3 OSB, OR BETTER SHEATHING. LONG DIMENSION SHALL BE PERPENDICULAR AND END JOINTS SHALL BE STAGGERED. FASTEN SHEATHING WITH 8D COMMON NAILS AT 6" O.C. AT GABLE ENDS AND ALL EDGES AND 8D COMMON NAILS AT 12" O.C. AT ALL INTERMEDIATE FRAMING MEMBERS.
17. DO NOT NOTCH, BORE OR DRILL THROUGH ANY SUPPORT COLUMNS, GIRDERS, BEAMS, JOIST SUPPORTING BEARING WALLS OR ANY OTHER CONCENTRATED LOAD BEARING MEMBER UNLESS SPECIFICALLY NOTED ON PLANS. CONTACT DESIGNER IF ANY QUESTIONS ARISE.
18. PROVIDE A SIMPSON 'H-2.5' HURRICANE CLIP AT EACH RAFTER CONNECTION TO EXTERIOR WALL TOP PLATES.
19. ATTICS WITH A CLEAR HEIGHT OF 30 INCHES OR MORE MUST BE PROVIDED WITH AN ACCESS. THE ACCESS OPENING SHALL 22" X 30" MINIMUM. OPENING TO HAVE 30" MINIMUM CLEARANCE FROM TOP OF OPENING TO BOTTOM OF ROOF ALL AROUND.
20. FLASHING SHALL BE INSTALLED AT JUNCTIONS OF CHIMNEYS AND ROOFS, IN ROOF VALLEYS AND AROUND ALL ROOF OPENINGS.
21. PROVIDE 4 x 4 OR (2) 2 x 4'S LAMINATED WITH 16D @ 12" O.C. KING POSTS (KP) WHERE SHOWN ON PLAN.
22. PROVIDE PURLIN WALLS WHERE SHOWN ON ROOF PLAN. USE 2 X 4 'S @ 24" O.C. AND/OR LINED-UP UNDER EACH RAFTER. EXTEND PURLIN WALL DOWN TO BEARING MEMBER BELOW.
23. ALL RAFTERS TO BE NOTCHED (SEAT CUT) TO PROVIDE FULL BEARING AT SUPPORT MEMBERS.
24. ALL WINDOW HDRS TO BE 4 X 10, U.N.O.

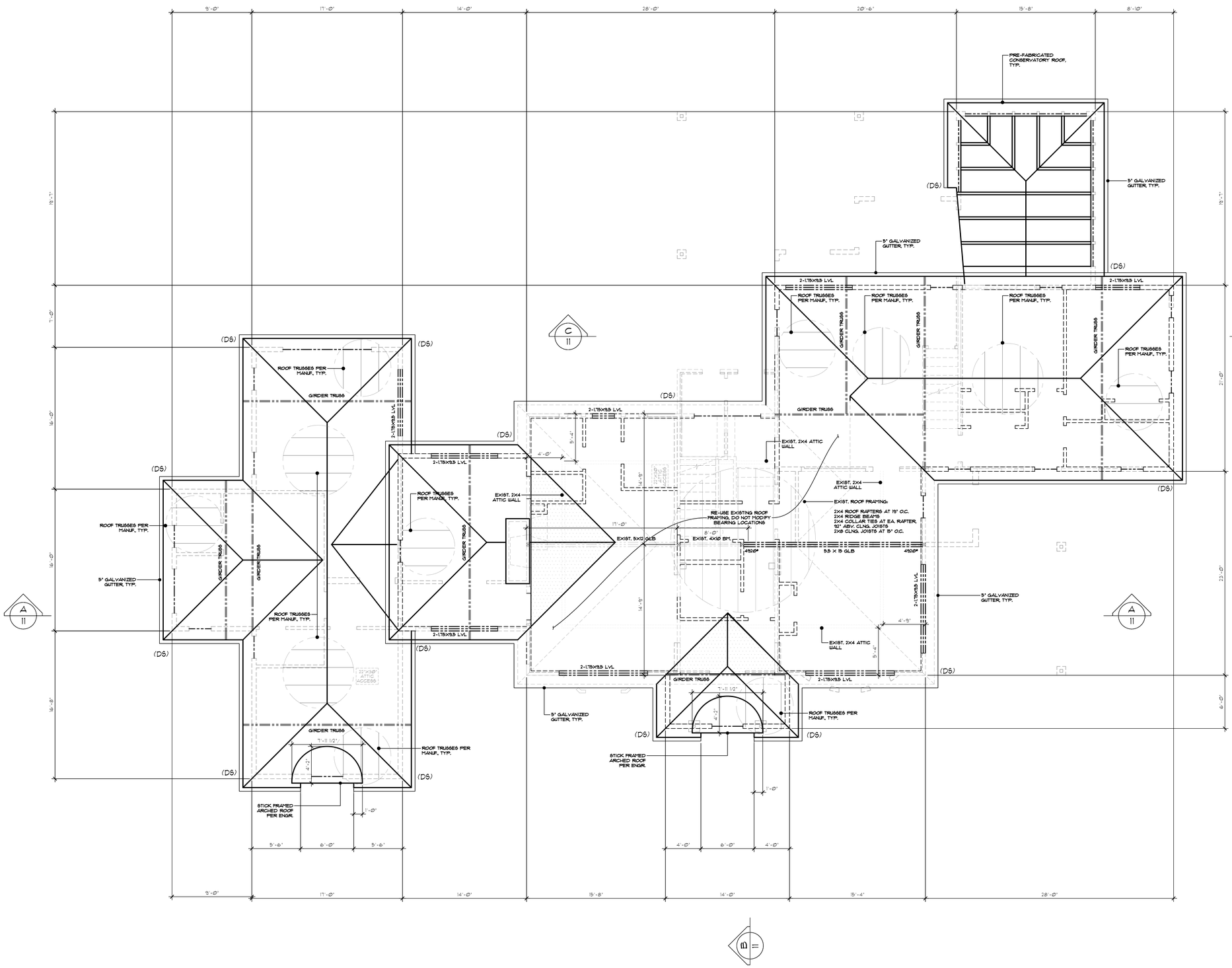
ATTIC VENTILATION CALCULATIONS:

VENTILATION REQUIRED IN ATTIC AREA:
3498 SQ. FT. X 144 SQ. IN. - 1/150 = 3358 TOTAL SQ. IN. REQUIRED

LOCATION:	REQ. SQ. IN.	NO. OF VENTS:	VENT SIZE:	TOTAL SQ. IN.:
AT RIDGE	1679	28	61 sq.in.	1708
AT EAVES	1679	84	20 sq.in.	1680
TOTAL:	3358	112	81 sq.in.	3388

SYMBOLS LEGEND:

- ⊠ — DENOTES (2) CRIPPLE STUDS (2x WIDTH OF WALL) U.N.O. 3-STUD ASSEMBLY MAY BE USED IN LIEU OF 4x4 POST 4-STUD ASSEMBLY MAY BE USED IN LIEU OF 6x6 POST
- 1 — BEAM SCHEDULE CALLOUT.
- BEARING WALL DETAIL.
- S.D. — HOUSE WIRED SMOKE DETECTOR.
- 6.8 — FLOOR FRAMING DETAIL
- (DS) — DOWNSPOUT TO RAINDRAIN BELOW.
- INDICATES ROOF FRAMED OVER ROOF BELOW, USE 2X8 RAFTERS @ 24" O.C. W/ 2X10 RIDGES, 1 2X10 VALLEY RAFTERS LAID FLAT ON TRUSSES BELOW.
- (KP) — 4X4 KING POST (KP) FROM HIP, VALLEY AND/OR RIDGE TO BEARING MEMBER BELOW. REFER TO DETAIL.
- 1 / D1 — DETAIL CALLOUT OVER SHEET #.
- 4X10 HEADER (U.N.O.)



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SEE TRUSS ENGR. SHEETS FROM MANUF.

CONTRACTOR TO CONFIRM EXIST. CONDITIONS, & INFORM DESIGNER OF ANY DISCREPANCIES, TYP.

ROOF FRAMING PLAN

1/4" = 1'-0"

ALL ROOF SLOPES TO BE 8:12 U.N.O.
ALL EAVES TO BE 1'-0" U.N.O.

FOWLER HOME + DESIGN

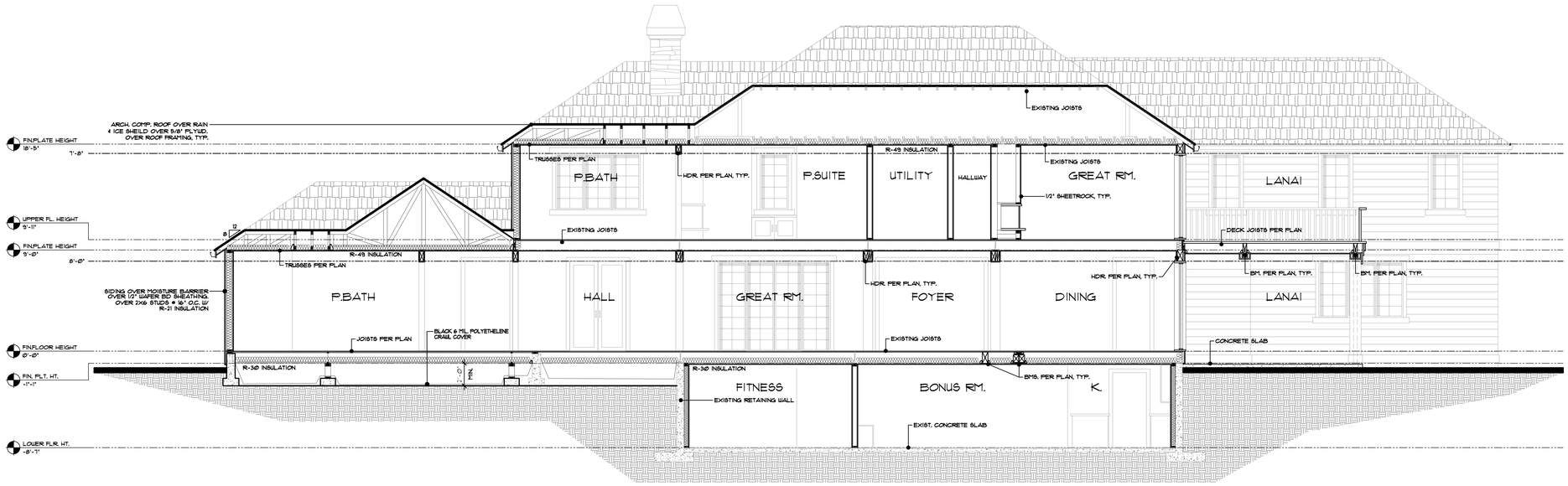
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ROOF FRAMING PLAN

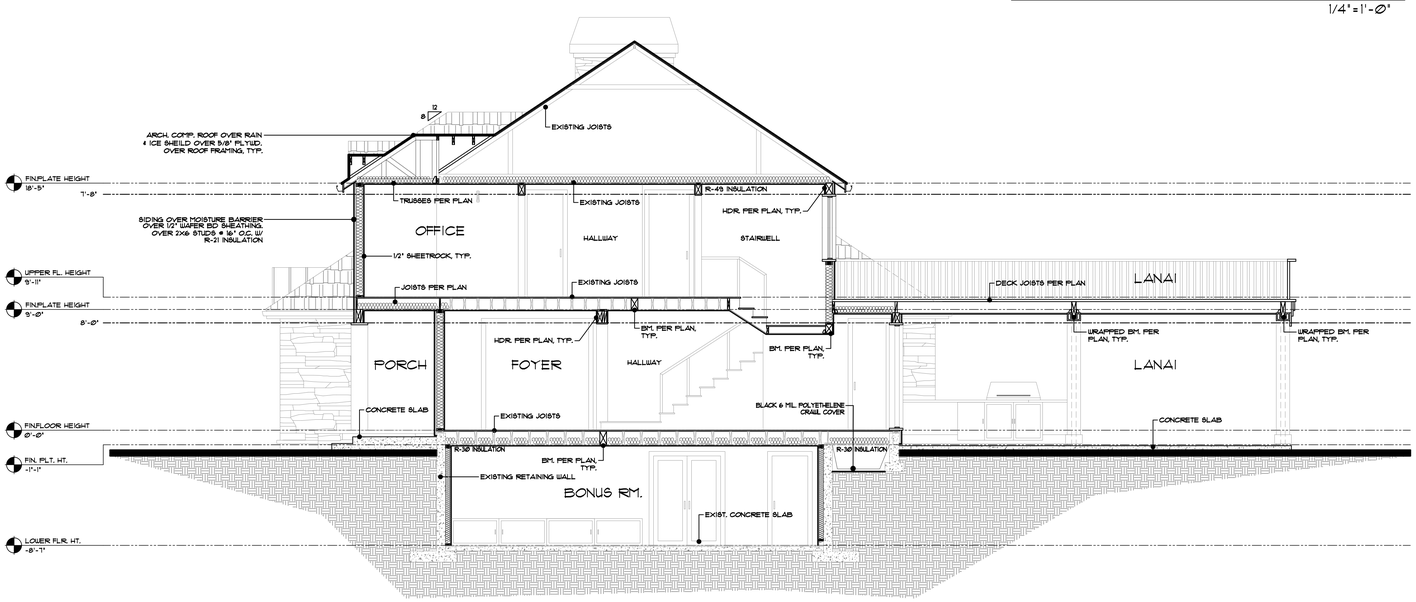
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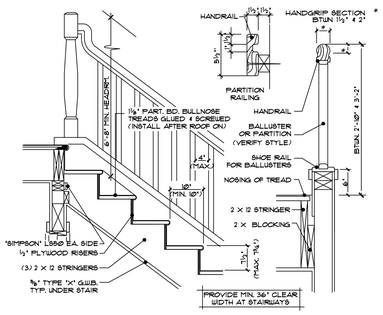
CROSS SECTION A.

1/4" = 1'-0"



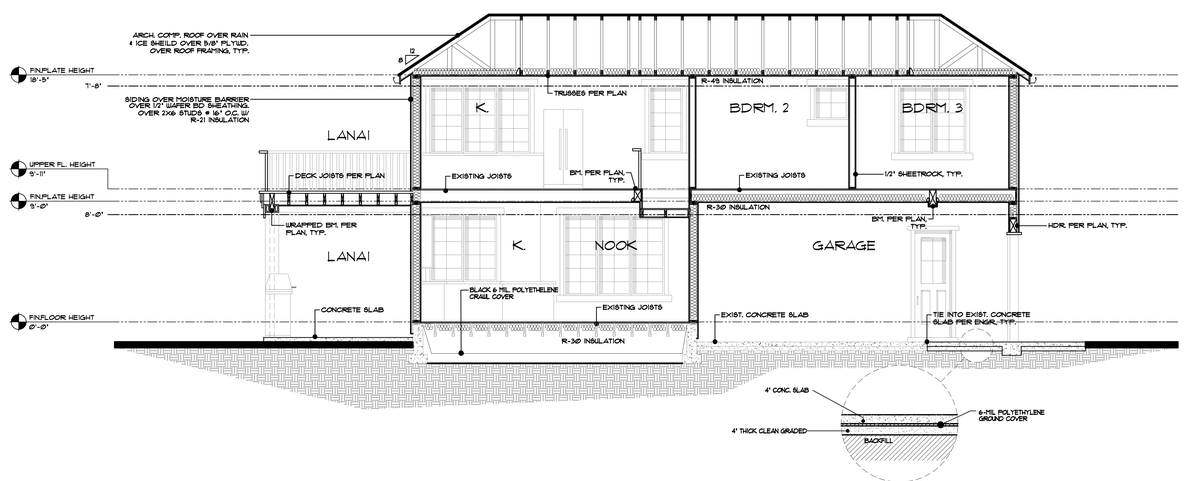
CROSS SECTION B.

1/4" = 1'-0"



STAIR DETAIL

SCALE : N.T.S.



CROSS SECTION C.

1/4" = 1'-0"

SEE STRUC. ENGR. SHEETS

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CROSS SECTIONS

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MILWAUKIE PLANNING
10501 SE Main St.
Milwaukie OR 97222
503-786-7630
planning@milwaukieoregon.gov

Submittal Requirements

For all Land Use Applications
(except Annexations and Development Review)

All land use applications must be accompanied by a signed copy of this form (see reverse for signature block) and the information listed below. The information submitted must be sufficiently detailed and specific to the proposal to allow for adequate review. Failure to submit this information may result in the application being deemed incomplete per the Milwaukie Municipal Code (MMC) and Oregon Revised Statutes.

Contact Milwaukie Planning staff at 503-786-7630 or planning@milwaukieoregon.gov for assistance with Milwaukie's land use application requirements.

1. **All required land use application forms and fees**, including any deposits.

   Applications without the required application forms and fees will not be accepted.

2. **Proof of ownership or eligibility to initiate application** per MMC Subsection 19.1001.6.A.

   Where written authorization is required, applications without written authorization will not be accepted.

3. **Detailed and comprehensive description** of all existing and proposed uses and structures, including a summary of all information contained in any site plans.

   Depending upon the development being proposed, the description may need to include both a written and graphic component such as elevation drawings, 3-D models, photo simulations, etc. Where subjective aspects of the height and mass of the proposed development will be evaluated at a public hearing, temporary onsite "story pole" installations, and photographic representations thereof, may be required at the time of application submittal or prior to the public hearing.

4. **Detailed statement** that demonstrates how the proposal meets the following:

   A. All applicable development standards (listed below):

      1. **Base zone standards** in Chapter 19.300.
      2. **Overlay zone standards** in Chapter 19.400.
      3. **Supplementary development regulations** in Chapter 19.500.
      4. **Off-street parking and loading standards and requirements** in Chapter 19.600.
      5. **Public facility standards and requirements**, including any required street improvements, in Chapter 19.700.

   B. All applicable application-specific approval criteria (check with staff).

   C. Compliance with the Tree Code (MMC 16.32): www.milwaukieoregon.gov/trees

   These standards can be found in the MMC, here: www.qcode.us/codes/milwaukie/

5. **Site plan(s), preliminary plat, or final plat** as appropriate.

   See Site Plan, Preliminary Plat, and Final Plat Requirements for guidance.

6. **Copy of valid preapplication conference report**, when a conference was required.

APPLICATION PREPARATION REQUIREMENTS:

- Electronic copies of all application materials are required at the time of submittal.

ADDITIONAL INFORMATION:

- Neighborhood District Associations (NDAs) and their associated Land Use Committees (LUCs) are important parts of Milwaukie's land use process. The City will provide a review copy of your application to the LUC for the subject property. They may contact you or you may wish to contact them. Applicants are strongly encouraged to present their proposal to all applicable NDAs prior to the submittal of a land use application and, where presented, to submit minutes from all such meetings. NDA information: www.milwaukieoregon.gov/citymanager/what-neighborhood-district-association.
- By submitting the application, the applicant agrees that City of Milwaukie employees, and appointed or elected City Officials, have authority to enter the project site for the purpose of inspecting project site conditions and gathering information related specifically to the project site.

As the authorized applicant I, (print name) MARK EKLUND, attest that all required application materials have been submitted in accordance with City of Milwaukie requirements. I understand that any omission of required items or lack of sufficient detail may constitute grounds for a determination that the application is incomplete per MMC Subsection 19.1003.3 and Oregon Revised Statutes 227.178. I understand that review of the application may be delayed if it is deemed incomplete.

Furthermore, I understand that, if the application triggers the City's sign-posting requirements, I will be required to post signs on the site for a specified period of time. I also understand that I will be required to provide the City with an affidavit of posting prior to issuance of any decision on this application.

Applicant Signature: Mark Eklund

Date: 9/3/2024

Official Use Only

Date Received (date stamp below):

9/3/2024

Received by: Ryan Dyar, Associate Planner

Peter Meijer Architect, PC

Historic Resource Land Use Review – Approval Criteria, Findings, and Recommendations
1620 SE Waverly Drive, Milwaukie, Oregon

Prepared for:
City of Milwaukie, Oregon
October 1, 2024

Description of the Historic Resource Land Use Review Application

The proposed work includes the addition of a primary wing located on the east side of the residence, the addition of a 306 sq. ft. prefabricated conservatory at the southwest side of the residence, extending the west garage wall 6 feet, and extending the south kitchen and nook walls 8.5 feet and 6 feet respectively. The total first floor additions including the conservatory is 1,436 sq. ft. A lanai and porch are proposed for the northwest corner of the house. The two-story bay window to the east of the primary entrance will be eliminated.

On the second floor, wall extensions are proposed on the north, front elevation, wall above the porch; the east wall at the existing bath, the south wall, and west wall. These extensions amount to a total of 348 sq. ft. of additional area. Other additions to the second floor include a deck to the northwest and south. The roofs of the main body of the house and the west wing will remain the same height as they exist today. A hip roof is proposed for the east wing. The pedimented dormers on the west wing will be eliminated. Other proposed roofs maintain the existing roof slopes and do not exceed the existing maximum height.

The existing north, primary elevation, is proposed to be redesigned to include an arched keystone entryway with full entablature and doric pilasters, curved molding around an oval window above the entrance, an arched entry door, gridded windows throughout, two curved copper roofs with oval windows below, an exposed stone chimney with a copper chimney cap, a tile cladded curved bay with a full entablature off the dining room, colonial wooden balusters, and usage of other Colonial Revival style such as brick, stone, copper, and painted cedar siding. All windows and doors will be replaced with either similar or a new design, including the Palladian window on the primary elevation. On the primary elevation, the heightened windows will eliminate the existing belt course.

Description of the Historic Context and Significance of the Property

Owned by William MacMaster, this home was constructed in 1922 by the Drake-Voss Construction Company as the family's second estate within Waverly. William moved to Oregon in 1883 from Scotland as a financial representative of the Dundee Land Company. He later formed a real estate investment firm with A.H. Birrell in 1890, buying out Birrell in 1903. William co-owned the firm with his son in law beginning in 1922, renaming it to MacMaster and Ireland until William's death. During his lifetime, William was president of the Arlington Club, president of Waverly twice, and president of the Portland Chamber of Commerce twice. Annie MacMaster was the head for all of the YMCA's Pacific Northwest women's war work during World War I.

Character-defining features of this Colonial Revival home as mentioned in the 1988 Cultural Resource Inventory are as follows:

- Primary entrance with paired paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters.
- Stucco exterior cladding
- Quoining, also made of stucco
- Polygonal bays
- End wall chimney
- Palladian window
- Full-height polygonal bay window with tent roof and spandrel
- Belt course above heads of second story windows
- Rectangular plan flanked by two smaller wings on side elevations

As defined by the National Park Service, a Character Defining Feature is a prominent or distinctive aspect, quality, physical feature, or characteristic that contributes significantly to the visual character of a resource. Character Defining Features are character-defining elements that include the overall shape of the building or resource, the materials used in building the resource, the craftsmanship of the resource, the resource's decorative details, the interior spaces and architectural features, and the site and environment of a resource, also known as its context. There are four zones in regards to character-defining features: High, Medium, and Low Preservation Priority, and Non-Historic.

High Preservation Priority features are the most character-defining features of the building that best convey the significant themes associated with the building. These features are to be maintained and preserved. Alterations to finishes may be acceptable, although the form and overall design should be retained. Work to high priority features will be closely reviewed. High Preservation Priority spaces can be public or private with a high level of integrity and history of architectural finishes and features that include original materials or details of highly skilled craftsmanship. Architectural finishes and features should be preserved. Regarding 1620 SE Waverly Drive, the highest priority features are ones visible from the public right of way, including all features comprising original and proposed north elevations, and other elevations that are visible from the public right of way.

Medium Preservation Priority features help to convey the significance of the building, but are not crucial character-defining features. If a Medium Preservation Priority feature were to be removed, the building would still retain its significance, although some unique aspects may be lost. Often, the overall design aspect of the feature is of medium priority, while the finishes or materials may be of a lower priority. Work to medium priority features require design review and may elicit some commentary although contemporary methods, materials, and designs may be sensitively incorporated. The overall project should reach a balance of retaining some Medium Preservation Priority features to allow for alterations to other medium priority features. Alterations should be compatible with the overall historic character of the building. Medium Preservation Priority spaces can be public or private with a moderate level of integrity and history of architectural finishes and features that include original materials or details but are less ornate than High Preservation Priority spaces in overall character. Architectural finishes and features should be preserved. Regarding 1620 SE Waverly Drive, medium priority features are ones not

visible from the public right of way, including all features comprising original and proposed south elevations, and other elevations that are not visible from the public right of way.

Low Preservation Priority features are part of the building design, but have little historic character or contribution to the historic significance of the building. Low priority features include service spaces, heavily-altered features, or additions not associated with the period of significance. Alterations to Low Preservation Priority features, while sympathetic to the historic qualities and character of the building, may incorporate extensive changes or total replacement through the introduction of contemporary methods, materials, and designs. Proposed work to Low Preservation Priority features will still be reviewed in order to monitor the impact to the overall character and significance of the building. Low Preservation Priority spaces are often not public areas but can be private spaces with minimal integrity and history of architectural finishes and features that contain few or no architectural features that need to be preserved or restored as part of a rehabilitation project. Regarding 1620 SE Waverly Drive, there are no low priority features on the exterior of the building. Since the 1988 Cultural Resource Inventory, no significant exterior changes that have required Historic Resource Land Use Review have been made to the building and, to the best of our knowledge, the building retains all of its significant historic character-defining features.

Non-historic features include architectural features or finishes that are not original to the historic building. Non-historic features primarily include walls and doors that are not considered historic, as well as other features that have been changed or added to the building after initial construction. These elements can be removed and altered with minimal care given to minimize impact. Within the City of Milwaukie, certain alterations to historic buildings do not need to be reviewed through the Historic Resource Land Use Review system. These alterations include the repair or replacement of roof materials either in kind or with similar materials, the application of storm windows, etc. While these changes may have been added to 1620 SE Waverly Drive, there are no other non-historic features of finishes present on the building.

Approval Criteria

Milwaukie Zoning Ordinance Title 19, Chapter 19.400 Overlay Zones and Special Areas governs the "identification, protection, enhancement, perpetuation, and use of site, structures, districts, objects, and buildings within the City that reflect the City's unique architectural, archaeological, and historical heritage, and to facilitate preservation of such properties." Any exterior alteration of a "significant" landmark is reviewed under the provisions of Subsection 19.403.5, Alterations and Development, and application is submitted to the City of Milwaukie Planning Commission. The criteria are listed with a response and findings for each, below.

Findings

Findings of the review are based on analyzing and comparing the materials submitted as part of the Historic Resource Land Use Review Application, the historic context and significance of the property, and the approval criteria.

1. *Retention of Original Construction*

Distinguishing original qualities defining a resource's character shall not be destroyed. Removal or alteration of historic materials or distinctive architectural features should be avoided when possible.

This project proposes to redesign the front elevation of the building, which includes the removal of high preservation priority character-defining features and distinguishing original qualities that define the resource's character as described in the 1988 Cultural Resource Inventory documentation. These features include the primary entrance with paired paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters; stucco quoining; stucco cladding; Palladian window; full-height polygonal bay window; bay window with tent roof and spandrel; and belt course above heads of second story windows. This criterion is therefore not met.

In order to meet this criterion, per the approval criteria, the removal of high preservation priority character-defining features should be avoided when possible. Changes to character defining features as listed in the 1988 Cultural Resource Inventory documentation on primary, north elevations and elevations visible from the public right of way should be avoided. Removal or manipulation of these features will create a home that is near unrecognizable compared to the original and will therefore become an inaccurate representation of the historic building. On the primary, north elevations, replace as needed due to deterioration. Other historic materials or distinctive architectural features that are medium preservation priority features not on the north elevations or not visible from the public right of way and are not mentioned as part of the 1988 Cultural Resource Inventory documentation may be removed or altered, as long as the alterations reflect a simplified style or simplified Colonial Revival style in order to distinguish the new changes from the original.

2. *Building Height*

Existing building heights should be maintained. Alteration of roof pitches shall be avoided. Raising or lowering a building's permanent elevation when constructing a foundation shall be avoided, except as required by building code or floodplain development permit.

The proposal shows the addition of a hip roof on the east wing of the home, with other roof alterations on the main portion and west wing of the home. The roof height of the main core of the home and the west wing will be maintained. The building's permanent elevation will remain as is and no new foundation under the existing home will be built. This criterion has not been fully addressed and is not yet met.

In order to meet this criterion, the following should be maintained:
- Retention of the flat roof on the existing east wing of the home;
- Retention of the two existing pediments above windows on the west wing of the home;
- Retention of the flat roof above the two-story bay window on the north elevation;
- Retention of the pediment above the front entry design sequence;
- Ensure that the proposed addition and extension of walls at the garage, kitchen and kitchen nook, and east wing will not alter the pitch of the roof to which they are attached; and
- Ensure that no new roof height will be taller than the existing tallest roof height of the building.

3. Horizontal Additions

The scale and proportion of building additions, including the relationship of windows to walls, shall be visually compatible with the traditional architectural character of the historic building. Contemporary design for alterations and additions is acceptable if the design respects the building's original design and is compatible with the original scale, materials, and window and door-opening proportions of the building.

The proposed additions and extensions on the west, east, and south elevations are visually compatible with the traditional architectural character and scale of the historic building. No extensions or additions on the north elevations are permitted due to Approval Criteria 1 *Retention of Original Construction.* Although contemporary in design, the design of these additions and alterations, including the overall scale and design of windows and doors respects the building's original design and are compatible with the original scale and window and door-opening proportions of the building. In order to meet this criterion, ensure that the materials of the east addition be visually compatible and respect the original stucco cladding and the Colonial Revival style architecture. Additionally, ensure the materials of the room extensions are visually compatible with that of the historic stucco cladding in order to be visually compatible with the traditional architectural character of the historic building. This criterion is met.

4. Windows

Window replacements shall match the visual qualities of original windows as closely as possible. Wood window frames are preferred in meeting this standard. However, if nonwood replacements exhibit similar visual qualities as their wooden counterparts, they may be acceptable. The original number of window panes shall be maintained or restored when replacements are required.

This application proposes to replace or redesign all windows on every elevation. The new windows do not match the visual qualities of the original. Therefore, this criterion is not met.

In order to meet this criterion, window redesigns and replacements shall match the visual qualities and design of the original as closely as possible.

5. Restoration Possible

Except where building code precludes it, new additions or alteration to buildings shall be done in such a manner that if such additions or alterations were to be removed in the future, the essential form and integrity of the original building could be restored.

As the new alterations are wood frame construction, in theory this criterion is met. The exterior carport, conservatory, lanais, patio, and porch shall be built in such a manner that can be removed in the future. The architect and build team shall ensure that the extensions and additions on the east and south elevations and garage are built in such a way that they can be removed and the original form and integrity of the original building can be restored.

6. Signs and Lighting

Signs, lighting, and other appurtenances (such as walls, fences, awnings, and landscaping) shall be visually compatible with the original character of the building.

There is no proposed signage. No lighting was indicated on the exterior primary façade. No elevation or renderings of appurtenances were submitted. Based on no sign, lighting, and other appurtenances submitted, this criterion is met.

7. Time Period Consistency

Buildings shall be recognized as products of their own time. Alterations that have no Historical basis or which seek to create an earlier appearance shall be avoided.

The proposed alterations that are allowable based on other approval criteria are proposed to align with the visual qualities of the original house and Colonial Revival style architecture. No proposed alterations create a false historical basis or create an earlier appearance. This criterion is met.

8. Visual Integrity/Style

Distinctive stylistic features, such as a line of columns, piers, spandrels, or other primary structural elements, or examples of skilled craftsmanship which characterize a building, shall be maintained or restored as far as is practicable.

The proposed changes to the north elevations and elevations visible to the public right of way do not meet Criterion 1 *Retention of Original Construction*. Therefore, this criterion is not met. In order to meet this criterion, distinctive stylistic features on the high preservation priority areas of the home, including the north elevations and elevations visible from the public right of way, shall be maintained or restored if showing signs of deterioration.

9. Replacement or Additional Materials

Whenever possible, deteriorated architectural features shall be repaired rather than replaced. In the event replacement of an existing feature is necessary, or an addition is proposed, new materials should match those of the original building, to the extent possible, in composition, design, color texture, and other visual qualities.

New materials in the proposed additions and extensions, including windows, doors, roofing, cladding, and others, are different than those of the original building in composition, design, color, texture, and other visual qualities. Additionally, because the original building does not feature stone, brick, or wood cladding, adding these features will not match those of the original building in the above listed visual qualities. Therefore, this criterion is not met. This criterion could be met with materials that more readily match existing materials.

10. Buffering

An appropriate buffer or screen, as provided under Subsection 19.504.6, may be required when a new commercial or industrial improvement or use is proposed on or adjacent to a designated resource, or within or adjacent to an historic district.

There is no new commercial or industrial improvement or use proposed on or adjacent to this home, therefore no buffer or screen is required. This criterion is not applicable.

Detailed Statement

Proposed Alterations at 1620 SE Waverly Dr.

11/7/2024
Prepared For: City of Milwaukie, Oregon
Prepared By: Fowler Home + Design

The summary of proposed alterations to the existing residence on the main floor include the addition of a primary wing located on the far east side of the residence that houses a bedroom, bath, and walk-in closet, the addition of a 306 s.f. prefabricated conservatory at the southwest side of the residence, extending the west garage wall 6', and extending the south kitchen and nook walls 8.5' and 6' respectively. The total main floor additions including the conservatory amounts to 1,436 s.f.

On the upper floor, slight wall extensions are made on the north wall above the porch, the east wall at the existing bath, the south wall, and west wall which amounts to a total of 348 s.f. additional area. The upper floor also includes the additions of a deck on the northwest and the south. All existing roofs are kept as existing as much as possible, such as the tallest roof form over the primary mass of the existing residence and the flat roof over the primary suite bath. The proposed roofs maintain the existing roof slopes and do not exceed the existing maximum height.

The two most critical elements outlined in the 1988 historic resource survey are the PERSON and STYLE categories. The STYE category states the residence as Colonial Revival style with elements of interest centered primarily around the entrance of the residence such as the paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters. Additional noted elements of interest include quoining at the entrance, an endwall chimney, a palladian window, the polygonal bay window with tent roof and spandrel, and the belt course over the second story windows.

The proposed alterations have little to no impact on the PERSON category as the overall character and layout of the existing residence is maintained. For the STYLE category, the key historic features are to remain and the proposed minor alterations add to the existing style such as the colonial wooden balusters.

The alterations will also create a more efficient and safe residence through better insulation, higher performance windows, and seismic fortification of the structure.

The proposed alterations adhere to all relevant zoning and development standards. Refer to the plans and elevations for further information.

Approval Criteria:

1. *Retention of Original Construction*

Distinguishing original qualities defining a resource's character shall not be destroyed. Removal or alteration of historic materials or distinctive architectural features should be avoided when possible.

Response: The majority of the existing walls and the primary and tallest portion of the roof will remain. The key design elements are to remain which includes the paneled doors, Swan's neck pediment, full entablature, Ionic pilasters, quoining at the entrance, an endwall chimney, a palladian window, the polygonal bay window with tent roof and spandrel, and the belt course over the second story windows. The criterion is met.

2. *Building Height*

Existing building heights should be maintained. Alteration of roof pitches shall be avoided. Raising or lowering a building's permanent elevation when constructing a foundation shall be avoided, except as required by building code or floodplain development permit.

Response: The tallest roof form will remain, thus maintaining the existing buildings highest elevation. All proposed roofs match the existing roof pitches. The flat roof of the existing east wing of the home, the pediments above windows on the west wing of the home, the flat roof above the two story bay window, and the pediment above the front entry will all be maintained. The criterion is met.

3. *Horizontal Additions*

The scale and proportion of building additions, including the relationship of windows to walls, shall be visually compatible with the traditional architectural character of the historic building. Contemporary design for alterations and additions is acceptable if the design respects the building's original design and is compatible with the original scale, materials, and window and door-opening proportions of the building.

Response: All proposed alterations, including the relationship of windows to walls, remain compatible with the original architectural character, scale, materials, and proportions of the historic residence. The criterion is met.

4. *Windows*

Window replacements shall match the visual qualities of original windows as closely as possible. Wood window frames are preferred in meeting this standard. However, if non wood replacements exhibit similar visual qualities as their wooden counterparts, they may be acceptable. The original number of window panes shall be maintained or restored when replacements are required.

Response: The window replacements will match the frames and grids of the original windows as closely as possible. The criterion is met.

5. *Restoration Possible*

Except where building code precludes it, new additions or alteration to buildings shall be done in such a manner that if such additions or alterations were to be removed in the future, the essential form and integrity of the original building could be restored.

Response: The proposed alterations and additions shall be constructed in such a manner that the additions and alterations could be removed and restored to its existing condition, thus preserving the essential form and integrity of the original building. The criterion is met.

6. *Signs and Lighting*

Signs, lighting, and other appurtenances (such as walls, fences, awnings, and landscaping) shall be visually compatible with the original character of the building.

Response: There is no proposed signage. The proposed lighting and other appurtenances will be visually compatible with the original character of the building. The criterion is met.

7. *Time Period Consistency*

Buildings shall be recognized as products of their own time. Alterations that have no Historical basis or which seek to create an earlier appearance shall be avoided.

Response: All proposed alterations and additions are deeply based in the Colonial Revival style. The criterion is met.

8. *Visual Integrity/Style*

Distinctive stylistic features, such as a line of columns, piers, spandrels, or other primary structural elements, or examples of skilled craftsmanship which characterize a building, shall be maintained or restored as far as is practicable.

Response: The distinctive stylistic features on the high preservation priority areas of the home are to be maintained. Any proposed features are of the Colonial Revival Style. The criterion is met.

9. *Replacement or Additional Materials*

Whenever possible, deteriorated architectural features shall be repaired rather than replaced. In the event replacement of an existing feature is necessary, or an addition is proposed, new materials should match those of the original building, to the extent possible, in composition, design, color texture, and other visual qualities.

Response: The proposed alterations and additions match the existing materials of the historic residence, such as stucco siding. The criterion is met.

10. *Buffering*

An appropriate buffer or screen, as provided under Subsection 19.504.6, may be required when a new commercial or industrial improvement or use is proposed on or adjacent to a designated resource, or within or adjacent to an historic district.

Response: Our current proposal does not include any buffering or screening. However, if required, the buffering or screening will be consistent with requirements from NPS. The criterion is not applicable.

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

- ALL EXCESS GRADING MATERIAL TO BE EXPORTED TO AN APPROVED DISPOSAL LOCATION.
- ALL FILL AREAS (ie: UNDER GARAGE FLOORS, SIDEWALKS, DRIVEWAYS, ETC.. TO BE COMPACTED GRANULAR FILL.
- THERE WILL BE A SLIGHT OVER EXCAVATION TO PROVIDE CONCRETE FORMING ALL AROUND NEW STRUCTURE.
- PROVIDE COUNTY/CITY APPROVED SEDIMENT FENCING AROUND EXCAVATED AREA PRIOR TO EXCAVATION AND CONSTRUCTION.
- PROVIDE COUNTY/CITY APPROVED STABILIZED GRAVELED CONSTRUCTION ENTRANCE PRIOR TO EXCAVATION AND CONSTRUCTION.
- STOCKPILES MUST BE COVERED WITH MULCH OR PLASTIC SHEETING BETWEEN OCTOBER 1 AND APRIL 30.
- CONTRACTOR/ SUB-CONTRACTOR TO VERIFY LOCATION OF ALL UTILITIES PRIOR TO EXCAVATION AND CONSTRUCTION.
- BOUNDARY AND TOPOGRAPHY INFORMATION HAS BEEN PROVIDED TO FOULER HOME DESIGN INC. FOULER HOME DESIGN, INC WILL NOT BE HELD LIABLE FOR THE ACCURACY OF THIS INFORMATION. IT IS THE SOLE RESPONSIBILITY OF THE CONTRACTOR /OWNER TO VERIFY ALL SITE CONDITIONS INCLUDING FILL PLACED ON SITE.

- ELEVATION LEGEND:
  - EE= EXISTING GRADE ELEVATION
  - FE= FINAL GRADE ELEVATION
  - FFE= FINISHED FLOOR ELEVATION
- PROVIDE A MINIMUM GRAVEL BASE UNDER ALL DRIVEWAY AREAS.
- PROVIDE A 4" MINIMUM GRAVEL BASE UNDER ALL SIDEWALK AND PATIO AREAS.
- PIPE ALL STORM DRAINAGE FROM THE BUILDING TO A COUNTY/CITY DISPOSAL POINT/CONNECTION.
- MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
- PROVIDE AND MAINTAIN FINISH GRADE WITH POSITIVE DRAINAGE AWAY FROM STRUCTURE ON ALL SIDES WITH A SLOPE OF 6" MINIMUM IN 10'-0".

EROSION CONTROL PLAN

- COVERED STOCKPILES - COVER W/- PLASTIC OCT. 1 - MAY 31.
- SEDIMENT FENCE
- CONSTRUCTION ENTRANCE (ACCESS POINT)
- WORK STAGING/ MATERIAL STORAGE
- N.B. 3" APPROVED COVER ON ALL AREAS OF BARE SOIL UNTIL PERMANENT LANDSCAPE IS IN PLACE
- NON-WOVEN INLET PROTECTION AT THE FIRST DOWNSTREAM CATCH BASIN
- WOODEN CURB RAMP
- DIRECTION OF STORM-WATER FLOW ON SITE

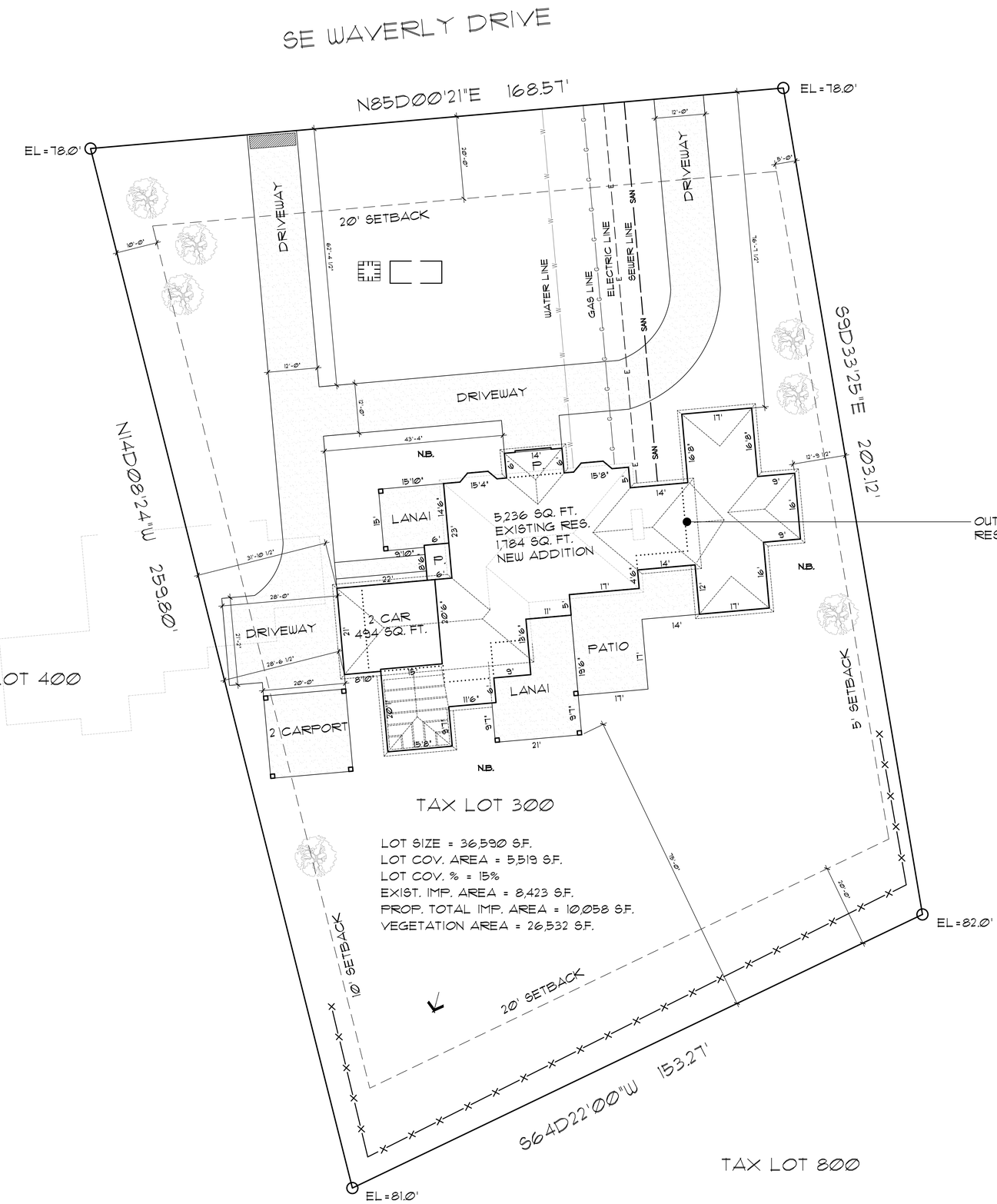
-NO STOCKPILES ARE TO BE LOCATED IN THE SIDE SETBACK AREAS.



IMPORTANT DISCLOSURE
- PLEASE READ:

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CONTRACTOR TO VERIFY EXISTING CONDITIONS AND UTILITIES, TYP.



FOWLER HOME + DESIGN

THE EKLUND RESIDENCE
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/1/2024
SCALE: 1"=10'-0"
FILE:

PLOT PLAN

0.

THESE PLANS AND DESIGNS HEREIN ARE COPYRIGHTED UNDER FEDERAL LAW BY TROY FOULER / FOULER HOME DESIGN LLC 2012

ELEVATION NOTES:

1. ROOFING MATERIAL TO BE ARCHITECTURAL COMPOSITION MATERIALS AND 8" STANDING SEAM METAL ROOFING SEE ELEVATION PAGE. ROOF SHINGLES TO BE NAILED PER MANUFACTURED INSTRUCTIONS FOR 80 MPH MINIMUM WIND AREAS.
2. ROOF PITCH TO BE SHOWN ON PLANS
3. ALL EAVES TO BE NOTED ON PLANS WITH A 5" GALVANIZED FACIA GUTTER ON SPECIFIED FACIA BD. PROVIDE 3" GALVANIZED DOWNSPOUTS (DS) AS SHOWN ON ROOF FRAMING PLAN.
4. SIDING NOTED ON PLANS.
5. ALL WINDOW & DOOR TRIM TO BE 5/4 X 4 AT SIDES AND 5/4 X 6 CROWN & SILL.
6. SIDING TO BE SPECIFIED ON PLAN. CAULK ALL CORNER BOARDS, JOINTS, WINDOWS, DOORS AND SURROUNDS.
7. ALL CORNER BOARD TRIM TO BE 2 X 4 PRIMED BD. AS SHOWN ON PLAN.
8. COVERED PORCHES AND EAVE SOFFITS TO BE 1/2" EXT. PLYWOOD OR EQUAL TOO. CAULK ALL JOINTS.
9. MASONARY VENEER TO BE CULTURED STONE OR EQUAL AS SHOWN ON PLAN. PROVIDE GALVANIZED FLASHING ON A MASONARY SILL CAP OVER VENEER. VERIFY LOCATION AND TYPE OF MASONARY WITH BUILDER PRIOR TO CONSTRUCTION.
10. PROVIDE 2 X 10 ROUGH SAWN CEDAR OR EQUAL AT ALL BELLY BANDS WITH A GALVANIZED "Z" FLASHING AT EXPOSED TOP. LOCATIONS ARE SHOWN ON PLAN UNLESS OTHERWISE NOTED.
11. PROVIDE VENTS AS SHOWN, SHUTTERS AND TRIMS ON ELEVATIONS AS SHOWN ON PLAN.
12. PROVIDE VINYL WINDOWS AS SHOWN ON PLAN.
13. EXPOSED CONCRETE WALKS TO BE BROOMED FINISH AS SHOWN ON PLAN.
14. MAXIMUM FOUNDATION EXPOSURE TO BE 18" FROM FINISHED GRADE.
15. MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
16. FINISH GRADE TO BE 1:1 MAXIMUM SLOPE WITH A 6" MINIMUM IN 10'-0" MINIMUM SLOPE AWAY FROM STRUCTURE ALL AROUND.
17. SEE ELEVATIONS FOR ANY ADDITIONAL NOTATIONS THAT MAY BE OF IMPORTANCE.
18. ALL WORK IS TO COMPLY WITH THE LATEST ADOPTED VERSIONS OF THE INTERNATIONAL ONE & TWO FAMILY DWELLING CODE, UNIFORM BUILDING CODE OF ANY APPLICABLE STATE, COUNTY OR LOCAL JURISDICTION.
19. PRIOR TO BEGINING CONSTRUCTION, THE PLANS AND SPECIFICATIONS SHALL BE APPROVED BY THE LOCAL BUILDING AUTHORITY.
20. THE CONTRACTOR IS RESPONSIBLE TO CHECK THE PLANS AND IS TO NOTIFY THE DESIGNER OF ANY ERRORS OR OMISSIONS PRIOR TO THE START AND/OR DURING CONSTRUCTION. THE DESIGNER IS NOT RESPONSIBLE FOR CONSTRUCTION MEANS AND METHODS, ACTS OR OMISSIONS OF THE CONTRACTOR AND/OR SUBCONTRACTOR.
21. BUILDING THIS PLAN ON SITE CONDITIONS DIFFERENT FROM THOSE SHOWN ON THE PLANS MAY REQUIRE MODIFIED FOUNDATION AND FRAMING DETAILS. THE CONTRACTOR IS RESPONSIBLE TO REVIEW SPECIFIC SITE CONDITIONS WITH THE DESIGNER BEFORE CONSTRUCTION.
22. VERIFY FOUNDATION AND FRAMING DETAILS (WHERE APPLICABLE) WITH MECH, PLUMBING, ELECTRICAL AND OR OTHER SUBCONTRACTORS TO ASSURE PROPER CONSTRUCTION INSTALLATION.
23. PLUMBING, ELECTRICAL AND MECHANICAL DIAGRAMS, LAYOUTS AND/OR DESIGN TO BE
24. SUPPLIED BY CONTRACTOR AND/OR SUB-CONTRACTOR.
25. ENGINEERED PRODUCTS (ROOF TRUSSES, FLOOR JOISTS) TO HAVE DESIGN, ENGINEERING SPECIFICATIONS AND LAYOUT SUPPLIED FROM MANUFACTURER.
26. WRITTEN DIMENSIONS SHALL HAVE PRECEDENCE OVER SCALED DIMENSIONS. DO NOT SCALE THE DRAWINGS. THE CONTRACTOR SHALL VERIFY AND IS RESPONSIBLE FOR ALL DIMENSIONS (INCLUDING ROUGH OPENINGS) AND CONDITIONS ON THE JOB.
27. SPECIFIC MANUFACTURERS AND MATERIALS DEPICTED ON THESE PLANS ARE AN INDICATION OF QUALITY AND STRENGTH. VERIFY ALL CONSTRUCTION MATERIAL SUBSTITUTIONS WITH CURRENT APPLICABLE BUILDING CODES AND LOCAL BUILDING OFFICIALS PRIOR TO INSTALLATION/SUBSTITUTION.
28. CONTRACTOR SHALL BE RESPONSIBLE FOR ANY VARIATIONS OR DEVIATIONS FROM THE ORIGINAL PLANS WITHOUT WRITTEN CONFIRMATION FROM THE DESIGNER.
29. ALL DIMENSIONS AND SQUARE FOOTAGE MAY VARY.
30. THE TYPE OF EXTERIOR FINISH, THE INSTALLATION, AND THE WATERPROOFING DETAILS ARE TO BE THE FULL RESPONSIBILITY OF THE OWNER/BUILDER. THIS DESIGNER ASSUMES NO RESPONSIBILITY OF THE BUILDING ENVELOPE

DESIGN LOADS:

WIND	110 MPH OR LESS
SEISMIC DESIGN CATEGORY	D2
FROST DEPTH	18 INCHES
ROOF DEAD LOAD	11 PSF
ROOF LIVE LOAD	20 PSF
ROOF SNOW LOAD	25 PSF
FLOOR DEAD LOAD	15 PSF
FLOOR LIVE LOAD	40 PSF
STAIRS	40 PSF
EXTERIOR BALCONIES	60 PSF
DECKS	60 PSF

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THE PLANS YOU HAVE PURCHASED ARE FOR THE CONSTRUCTION ONE HOME ONLY. UNDER NO CIRCUMSTANCES IS IT LEGAL TO BUILD FROM THESE PLANS MORE THAN ONCE WITHOUT THE WRITTEN CONSENT FROM THE DESIGNER TROY FOULER. THESE PLANS ARE COPYRIGHTED AND IT IS A VIOLATION OF FEDERAL COPYRIGHT LAWS TO REPRODUCE THESE PLANS. FOULER HOME DESIGN LLC. WILL FULLY PROSECUTE ANY VIOLATION OF ITS COPYRIGHTED DESIGNS AND PLANS. FURTHERMORE IT IS UNDERSTOOD THAT IT IS COMPLETELY THE RESPONSIBILITY OF THE CONTRACTOR TO CONSTRUCT THE HOME DESCRIBED HEREIN, ON ANY PARTICULAR SITE AND WITHIN THE CONFINES OF THE GOVERNING JURISDICTION. FOULER HOME DESIGN LLC. TAKES NO RESPONSIBILITY FOR THE CONFORMANCE OF THIS PLAN TO ANY CODE OR ANY BUILDING SITE.

WINDOW SCHEDULE

MARK	SIZE & TYPE	QUANTITY
1	NOT USED	-
2	3-2/6X5/0 FX. MULLED	1
3	4-2/6X6/0 MULLED FX.-CSMT.-CSMT.-FX.	1
4	2/6X4/0 CSMT.	1
5	2/6X6/0 CSMT.	3
6	3-2/6X5/0 MULLED FX.-CSMT.-FX.	1
7	2/6X5/0 CSMT.	5
8	3-2/6X6/0 MULLED FX.-CSMT.-FX.	1
9	2-2/6X5/0 CSMT. MULLED	1
10	2/0X5/0 CSMT.	7
11	2-2/6X6/0 CSMT. MULLED	1
12	2/6X5/0 FX.	8
13	3-2/6X3/4 MULLED FX.-CSMT.-FX.	1
14	2-2/6X3/8 CSMT. MULLED	1
15	3-2/6X3/8 MULLED FX.-CSMT.-FX.	1
16	4/0X5/0 FX.	3
17	4-2/6X4/0 MULLED FX.-CSMT.-CSMT.-FX.	1

NOTES:
- ALL WINDOWS TO HAVE GRIDS U.N.O.
- CONTRACTOR TO CONFIRM ALL WINDOW SIZES AND QUANTITIES



FRONT ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL



EXIST. FRONT ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



EXIST. RIGHT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



RIGHT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/6/2024
SCALE: 1/4"=1'-0"
FILE:

EXTERIOR ELEVATION

1.

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CONTRACTOR TO SELECT 1 OPTION

ORSC, 2021 TABLE N1101(2)

1	HIGH EFFICIENCY HVAC SYSTEM: GAS-FIRED FURNACE OR BOILER WITH MINIMUM AFUE OF 94% OR AIR-SOURCE HEAT PUMP HSPF OF 10.0 TO 14.0 SEER COOLING, OR GROUND SOURCE HEAT PUMP COP OF 3.5, OR ENERGY STAR RATED
2	HIGH EFFICIENCY WATER HEATING SYSTEM: NATURAL GAS/PROPANE, WATER HEATER WITH MIN. UEF OF 0.760, OR ELECTRIC HEAT PUMP WATER HEATER W/ MIN. 2.0 COP, OR NATURAL GAS/PROPANE TANKLESS/ INSTANTANEOUS HEATER W/ MIN. 0.940 UEF AND DRAIN WATER HEAT RECOVERY UNIT INSTALLED ON MIN. OF ONE SHOWER/TUB-SHOWER
3	WALL INSULATION UPGRADE EXTERIOR WALLS U-0.045/R-21 CONVENTIONAL FRAMING WITH R-3.0 CONTINUOUS INSULATION
4	ADVANCED ENVELOPE WINDOWS U-0.25 (AREA WEIGHTED AVERAGE) AND, FLAT CEILINGS U-0.021/R-60, AND FRAMED FLOORS U-0.029/R-38 OR SLAB EDGE INSULATION TO F-2.0 AB OR LESS (R-18 FOR 48", R-15 FOR 36" OR R-5 FULLY INSULATED SLAB)
5	DUCTLESS HEAT PUMP: FOR DWELLING UNITS WITH ALL-ELECTRIC HEAT PROVIDE: DUCTLESS HEAT PUMP OF MIN. HSPF 10 IN PRIMARY ZONE REPLACES ZONAL ELECTRIC HEAT SOURCES, AND PROGRAMMABLE THERMOSTAT FOR ALL HEATERS IN BEDROOMS
6	HIGH EFFICIENCY THERMAL ENVELOPE UA: PROPOSED UA IS 8% LOWER THAN THE CODE UA
7	GLAZING AREA GLAZING AREA MEASURED AS THE TOTAL OF FRAMED OPENINGS IS LESS THAN 12% OF CONDITIONED FLOOR AREA
8	3 ACH AIR LEAKAGE CONTROL + EFFICIENT VENTILATION ACHIEVE A MAX. OF 3.0 ACH@50 WHOLE-HOUSE AIR LEAKAGE WHEN THIRD-PARTY TESTED AND PROVIDE A WHOLE-HOUSE VENTILATION SYSTEM INCLUDING HEAT RECOVERY WITH A MINIMUM SENSIBLE HEAT RECOVERY EFFICIENCY OF NOT LESS THAN 66%

IMPORTANT DISCLOSURE PLEASE READ:

THE PLANS YOU HAVE PURCHASED ARE FOR THE CONSTRUCTION ONE HOME ONLY. UNDER NO CIRCUMSTANCES IS IT LEGAL TO BUILD FROM THESE PLANS MORE THAN ONCE WITHOUT THE WRITTEN CONSENT FROM THE DESIGNER TROY FOULER. THESE PLANS ARE COPYRIGHTED AND IT IS A VIOLATION OF FEDERAL COPYRIGHT LAWS TO REPRODUCE THESE PLANS. FOULER HOME DESIGN LLC WILL FULLY PROSECUTE ANY VIOLATION OF ITS COPYRIGHTED DESIGNS AND PLANS. FURTHERMORE IT IS UNDERSTOOD THAT IT IS COMPLETELY THE RESPONSIBILITY OF THE CONTRACTOR TO CONSTRUCT THE HOME DESCRIBED HEREIN, ON ANY PARTICULAR SITE AND WITHIN THE CONFINES OF THE GOVERNING JURISDICTION. FOULER HOME DESIGN LLC. TAKES NO RESPONSIBILITY FOR THE CONFORMANCE OF THIS PLAN TO ANY CODE OR ANY BUILDING SITE.

WINDOW SCHEDULE

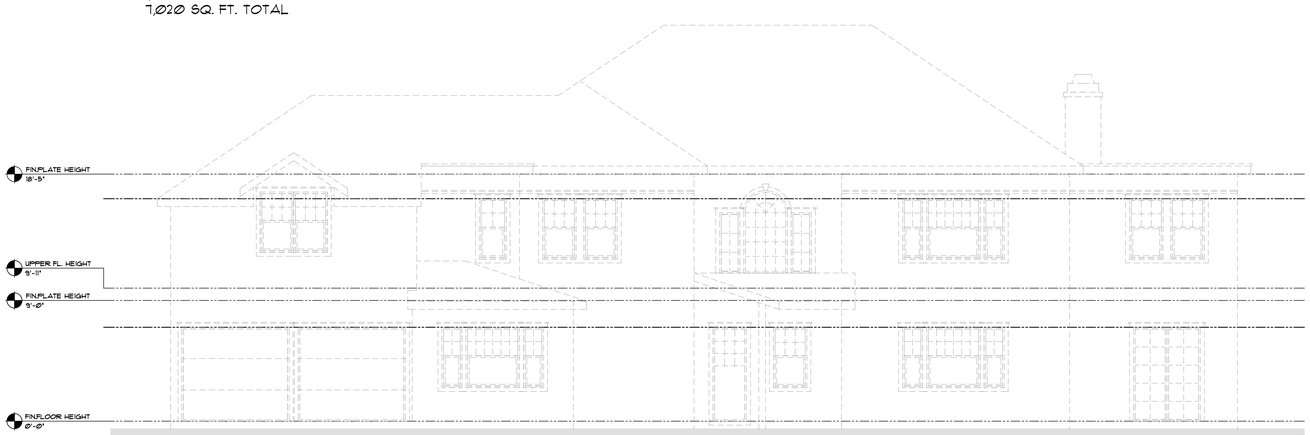
MARK	SIZE + TYPE	QUANTITY
1	NOT USED	-
2	3-2/6X5/0 FX. MULLED	1
3	4-2/6X6/0 MULLED FX.-CSMT.-CSMT.-FX.	1
4	2/6X4/0 CSMT.	1
5	2/6X6/0 CSMT.	3
6	3-2/6X5/0 MULLED FX.-CSMT.-FX.	1
7	2/6X3/0 CSMT.	5
8	3-2/6X6/0 MULLED FX.-CSMT.-FX.	1
9	2-2/6X5/0 CSMT. MULLED	1
10	2/0X5/0 CSMT.	7
11	2-2/6X6/0 CSMT. MULLED	1
12	2/6X5/0 FX.	8
13	3-2/6X3/4 MULLED FX.-CSMT.-FX.	1
14	2-2/6X3/8 CSMT. MULLED	1
15	3-2/6X3/8 MULLED FX.-CSMT.-FX.	1
16	4/0X5/0 FX.	3
17	4-2/6X4/0 MULLED FX.-CSMT.-CSMT.-FX.	1

NOTES:
- ALL WINDOWS TO HAVE GRIDS U.N.O.
- CONTRACTOR TO CONFIRM ALL WINDOW SIZES AND QUANTITIES



REAR ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL



EXIST. REAR ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



EXIST. LEFT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



LEFT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

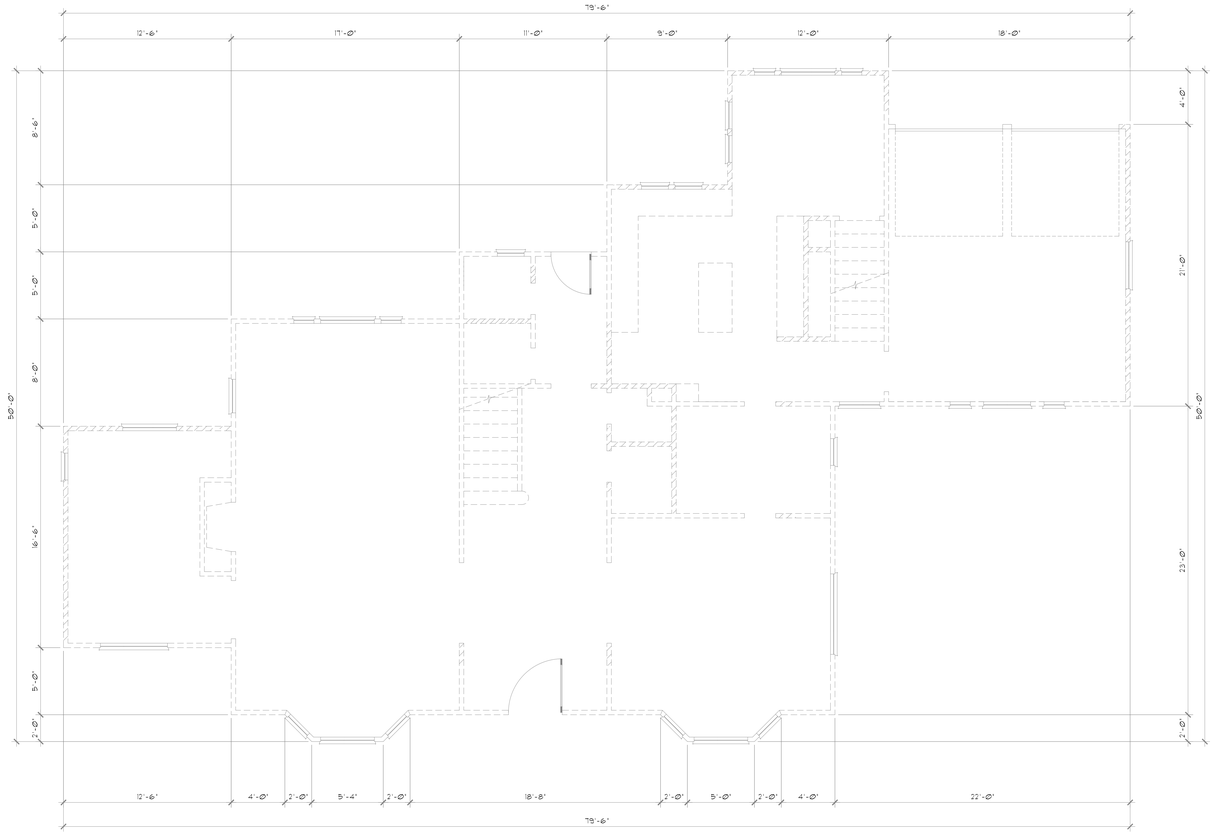
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/6/2024
SCALE: 1/4"=1'-0"
FILE:

EXTERIOR ELEVATION

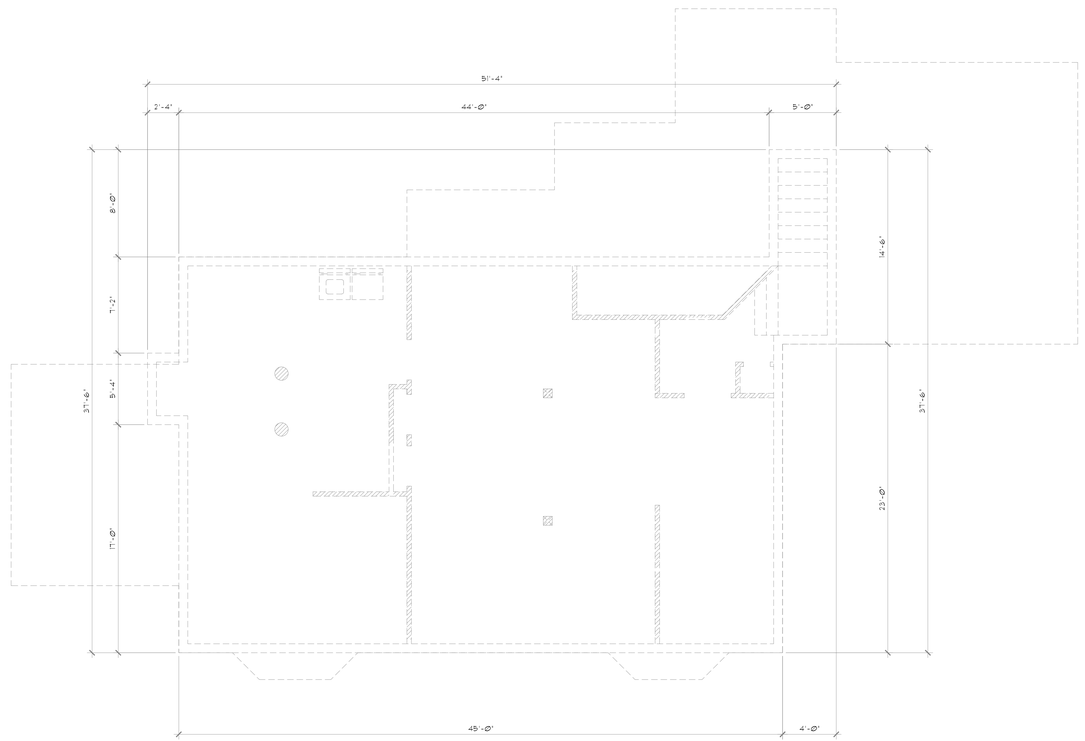
2.

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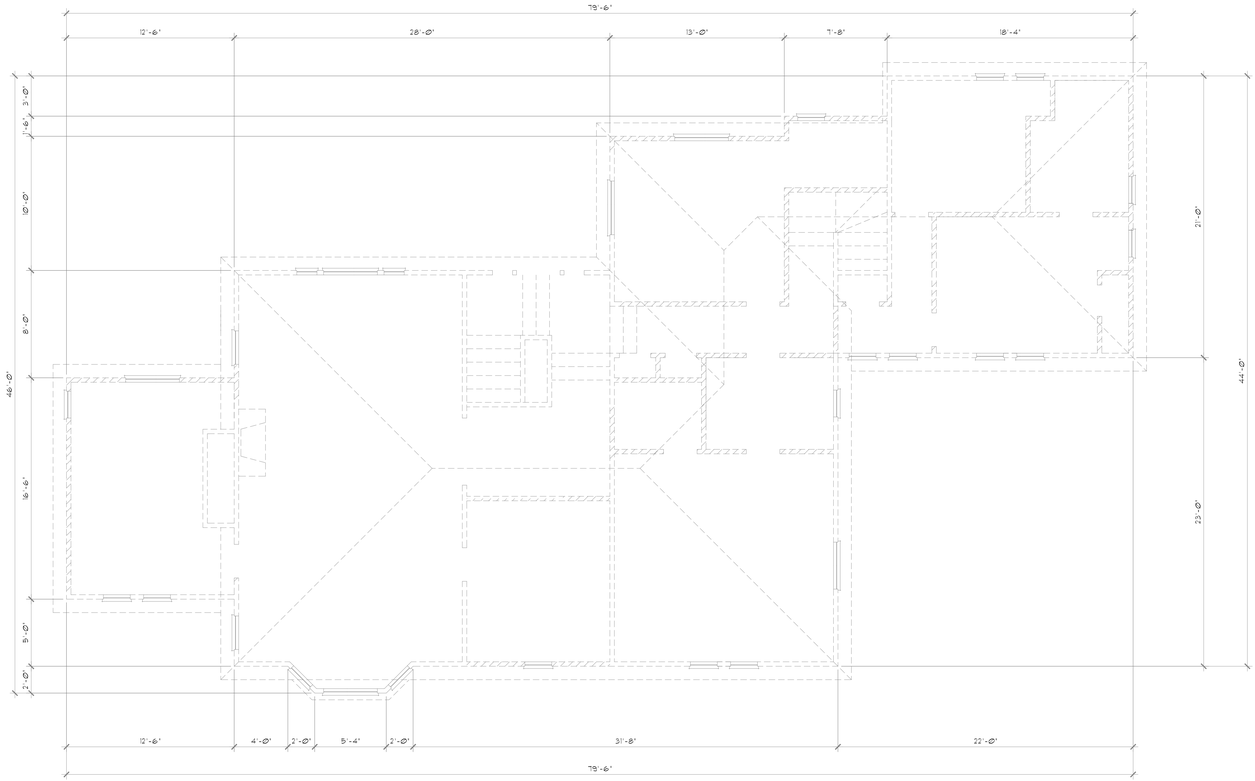
EXIST. MAIN FLOOR PLAN

1,956 SQ. FT. EXISTING 1/4"=1'-0"



EXIST. LOWER FLOOR PLAN

1,226 SQ. FT. EXISTING 1/4"=1'-0"



EXIST. UPPER FLOOR PLAN

2,054 SQ. FT. EXISTING 1/4"=1'-0"

IMPORTANT DISCLOSURE
- PLEASE READ:

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WALL LEGEND

- NEW (N) 2x WALL
- EXISTING (E) WALL TO BE REMOVED
- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

ALL DIMENSIONS TO OR FROM (E) STRUCTURE ARE FOR REFERENCE ONLY. CONTRACTOR TO FIELD VERIFY ALL DIMENSIONS AND IS RESPONSIBLE TO CONTACT DESIGNER W/ANY DISCREPENCIES.

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 4/20/2024
SCALE: 1/4"=1'-0"
FILE:

EXISTING FLOOR PLANS

3

THESE PLANS AND DESIGNS HEREIN ARE COPYRIGHTED UNDER FEDERAL LAW BY TROY FOULER & FOULER HOME DESIGN LLC 2012

FLOOR PLAN FRAMING NOTES:

1. ALL EXTERIOR WINDOW AND DOOR HEADERS TO BE 4 X 10 DF-L NO. 2 UNLESS OTHERWISE NOTED. (U.O.N.)
2. ALL EXTERIOR WALLS TO BE 2 X 6 STUDS @ 16" O.C. AND INTERIOR WALLS TO BE 2 X 4 STUDS @ 16" O.C. FOUNDATION PONY WALLS SHALL BE FRAMED OF 2 X 6 STUDS.
3. STANDARD STUD HEIGHT FOR UPPER FLOOR TO BE 9'-0" CEILING HEIGHT.
4. STANDARD STUD HEIGHT FOR MAIN FLOOR TO BE 9'-0" CEILING HEIGHT.
5. WINDOW AND DOOR HEADER HEIGHTS TO BE 8'-0" @ UPPER FLOOR AND 8'-0" @ LOWER FLOOR U.O.N. DOOR OPENINGS AND OTHER OPENING TO BE ALLIGNED WITH WINDOW HEIGHTS U.O.N.
6. ALL WOOD IN DIRECT CONTACT WITH CONCRETE TO BE PRESSURE TREATED AND/OR PROTECTED BY 55# FELT MOISTURE BARRIER.
7. PROVIDE POLYISOCOCYANURATE FOAM TYPE INSULATION AT FLOOR AND PLATE LINES, OPENINGS IN PLATES, CORNER STUD CAVITIES AND AROUND DOOR AND WINDOW ROUGH OPENINGS.
8. BEARING FOR JOISTS, SUPPORT MEMBERS, HEADERS, AND BEAMS TO BE 1½ THE MEMBERS WIDTH AND SOLID BEARING TO FOOTINGS. 2 X JOISTS TO HAVE 1-1/2 MIN. BEARING, U. O.N.
9. PROVIDE FIRE BLOCKING, DRAFT STOPS AND FIRE STOPS AS PER 2021 O.R.S.C. SECTION 602.8.
10. BLOCK ALL STUD WALLS AT SHEATHING SPLICES OR AS REQUIRED.
11. INTERIOR PASSAGE DOORS TO HAVE A MINIMUM OF (2) 2 X TRIMMERS EACH SIDE OF DOOR AND TO BE CENTERED IN WALLS.
12. ALL HOLDOWNS, JOIST HANGERS, BEAM HANGERS AND OTHER CONNECTORS TO BE "SIMPSON" OR EQUAL.
13. ALL STUD WALLS SHALL HAVE DOUBLE TOP PLATES OF THE SAME DIMENSION AS THE WALL FRAMING. PLATES SHALL OVERLAP A MINIMUM OF 48" BETWEEN SPLICES WITH AT LEAST (8) 16D NAILS THROUGH BOTH PLATES OF SPLICE.
14. DO NOT NOTCH OR DRILL THROUGH ANY SUPPORT COLUMNS, GIRDERS, BEAMS, JOIST SUPPORTING BEARING WALLS OR ANY OTHER CONCENTRATED LOAD BEARING MEMBER UNLESS SPECIFICALLY NOTED ON PLANS. CONTACT DESIGNER IN ANY SUCH SITUATIONS ARISE.
15. THIS STRUCTURE TO BE ADEQUATELY BRACED FOR WIND AND GRAVITY LOADS UNTIL THE ROOF, FLOOR AND WALLS HAVE BEEN PERMANENTLY FRAMED TOGETHER AND SHEATHED.

LUMBER SPECIES AND GRADING:

A. POSTS, BEAMS, HEADERS.	DF-L NO.2
B. FLOOR JOISTS, CEILING JOISTS, RAFTERS.	DF-L NO. 2
C. SILLS, PLATES, BLOCKING, BRIDGING.	DF-L NO. 3
D. STUDS.	DF-L STUD GRADE
E. STUDS OVER 10' HIGH.	DF-L NO. 2
F. FLOOR DECKING.	DF-L UTILITY GRADE
G. WALL, ROOF SHEATHING.	CDX EXT. APA RATED PLY OR OSB 2-M-W
H. GLU-LAM BEAMS	FB-2400 DRY, ADH. INTERIOR (EXT. ADH. AT EXT. COND.)
I. PATALLEL STRAND LUMBER (PSL) MATERIALS	FB-2900 E=2.0 FV=290 UNLESS OTHERWISE NOTED.
J. LAMINATED VENEER LUMBER (LVL) MATERIALS	FB-2600 E=1.8 FV=285 UNLESS OTHERWISE NOTED.

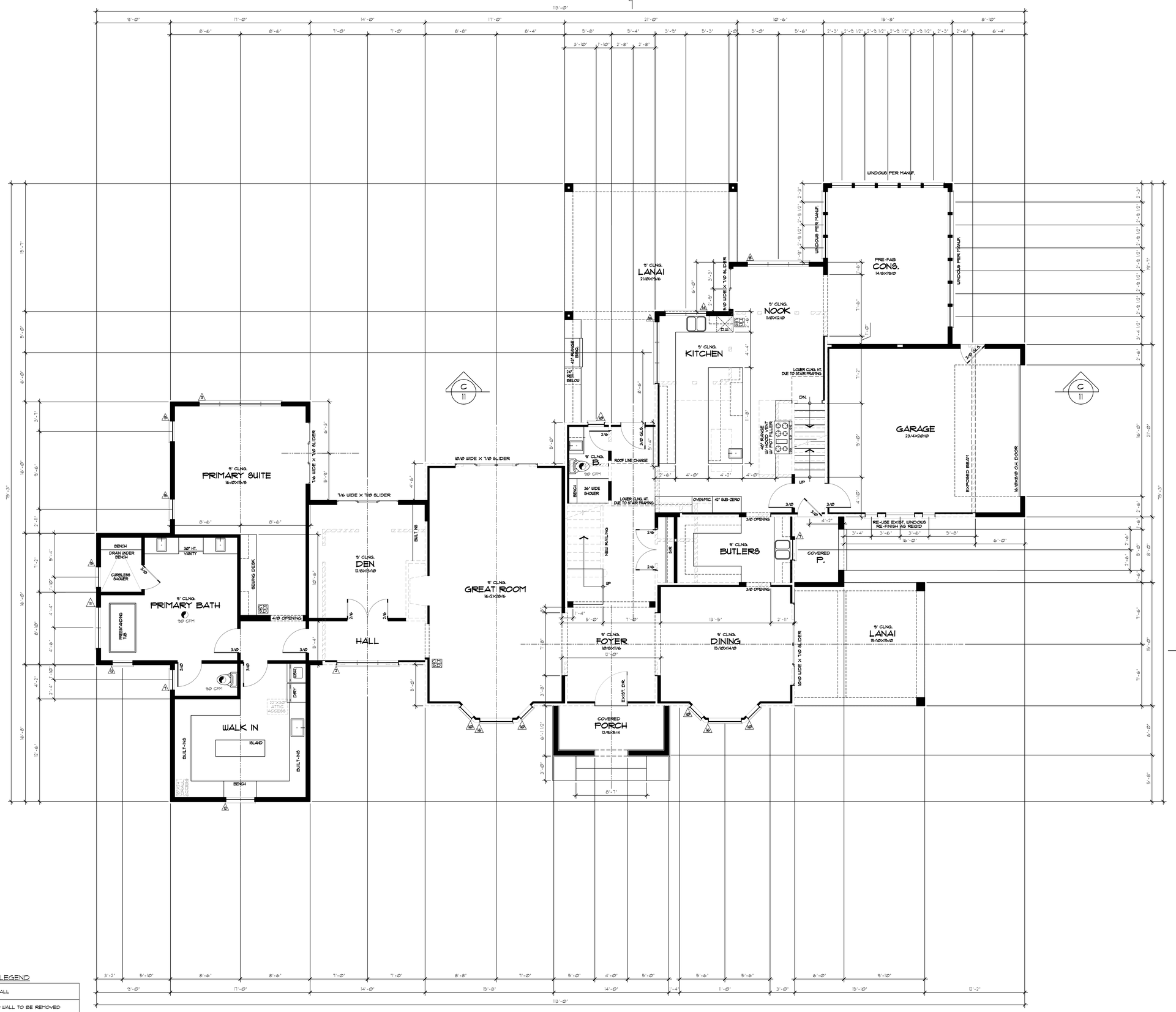
NAILING SCHEDULE:

REFER TO: O.R.S.C. 2021 TABLE R602.3(1)

WINDOW SCHEDULE

MARK	SIZE & TYPE	QUANTITY
1	NOT USED	-
2	3-2/6X5/0 FX. MULLIED	1
3	4-2/6X6/0 MULLED FX.-CSMT.-CSMT.-FX.	1
4	2/6X4/0 CSMT.	1
5	2/6X6/0 CSMT.	3
6	3-2/6X5/0 MULLED FX.-CSMT.-FX.	1
7	2/6X5/0 CSMT.	5
8	3-2/6X6/0 MULLED FX.-CSMT.-FX.	1
9	2-2/6X5/0 CSMT. MULLED	1
10	2/0X5/0 CSMT.	7
11	2-2/6X6/0 CSMT. MULLED	1
12	2/6X5/0 FX.	8
13	3-2/6X3/4 MULLED FX.-CSMT.-FX.	1
14	2-2/6X3/8 CSMT. MULLED	1
15	3-2/6X3/8 MULLED FX.-CSMT.-FX.	1
16	4/0X5/0 FX.	3
17	4-2/6X4/0 MULLED FX.-CSMT.-CSMT.-FX.	1

NOTES:
- ALL WINDOWS TO HAVE GRIDS U.N.O.
- CONTRACTOR TO CONFIRM ALL WINDOW SIZES AND QUANTITIES



MAIN FLOOR PLAN

1,956 SQ. FT. EXISTING
3,086 SQ. FT. LOWER TOTAL
306 SQ. FT. CONSERVATORY
1,130 SQ. FT. NEW ADDITION

1/4"=1'-0"

WALL LEGEND

	- NEW (N) 2x WALL
	- EXISTING (E) WALL TO BE REMOVED
	- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

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FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/6/2024
SCALE: 1/4"=1'-0"
FILE:

MAIN FLOOR

4

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FLOOR PLAN FRAMING NOTES CONT.:

INSULATION:

1. USE PATH 1 OF 2021 ORSC ENERGY CODE AND THE FOLLOWING.
INSULATION VALUES TABLE N1101(1)

ENERGY COMPLIANCE	PATH 1
WALL INSULATION	R-21/R-23
WALL INSULATION BELOW GRADE	R-15/R-21
FLAT CEILINGS	R-49
VAULTED CEILINGS	R-30
UNDERFLOORS	R-30
SLAB EDGE PERIMETER	R-15
HEATED SLAB INTERIOR	R-10
WINDOWS	U-0.27
WINDOW AREA LIMITATION	N/A
SKYLIGHTS	U-0.50
EXTERIOR DOORS	U-0.20
EXTERIOR DOORS W/ >2.5 FT. GLAZING	U-0.40
FORCED AIR DUCT	R - 8

2. INSULATION:

R-49	ROOF (FLAT CEILING)
R-30	ROOF (VAULT CEILING)
R-30	FLOORS OVER UNHEATED SPACES
R-23	EXTERIOR WALLS
R-13/21	BASEMENT WALLS (INTERIOR OR EXTERIOR)
R-15 (RIGID)	CONCRETE FLOOR SLAB EDGES AT PERIMETER UNDER HEATED AREAS.
R-8	EXPOSED FURNACE DUCTS IN UNHEATED AREAS

3. GLAZING/DOORS:

NO LIMITS	WINDOW AREA LIMIT
U=.35	WINDOW GLASS
U=.54	ENTRY DOOR GLASS (24 SQ. FT. MAX.)
U=.40	FULL LIGHT GLASS DOOR GLASS
U=.20	OTHER DOORS (50% MAX. GLAZING.)
U=.60	SKYLIGHT GLASS (2% MAX. OF HEATED SPACE)

4. ALL AIR INFILTRATIONS IN THE EXTERIOR ENVELOPE SHALL BE SEALED INCLUDING WINDOW AND DOOR FRAMES, WALLS, FOUNDATIONS, VENTING AND UTILITY PENETRATIONS. ACCESS DOORS TO CRAWL SPACE AND ATTIC AREAS TO HAVE THE SAME EQUIVALENT RATING OF THE WALL, FLOOR OR CEILING THOUGH WHICH THEY PENETRATE.

5. PROVIDE AN APPROVED INSULATION VAPOR BARRIER WITH A ONE PERM DRY CUP RATING OR LESS AND TO BE INSTALLED ON THE WARM SIDE OF THE INSULATION.

6. INSULATE ALL ACCESS DOOR/HATCHES TO CRAWL SPACES AND ATTICS TO THE EQUIVALENT RATING OF THE WALL, FLOOR OR CEILING THROUGH WHICH THEY PENETRATE.

7. ALL EXPOSED INSULATION IS TO HAVE A FLAME SPREAD RATING NOT TO EXCEED 25, A SMOKE-DEVELOPED FACTOR NOT TO EXCEED 450 AND CRITICAL RADIANT FLUX NOT LESS THAN 0.12 WATTS PER SQUARE CENTIMETER.

MISCELLANEOUS:

1. EACH BEDROOM TO HAVE A MINIMUM WINDOW OPENING OF 5.7 SQ. FT. WITH A MINIMUM CLEARANCE WIDTH OF 20 INCHES AND A BOTTOM SILL HEIGHT LESS THEN 44 IN. ABOVE FINISHED FLOOR.

2. ALL EXTERIOR WINDOWS ARE TO BE DOUBLE GLAZED AND ALL EXTERIOR DOORS ARE TO BE SOLID CORE WITH WEATHER STRIPPING. PROVIDE 1/2" DEAD BOLT LOCKS ON ALL EXTERIOR DOORS. PROVIDE PEEP HOLES @ 54"-64" ABOVE FINISHED EXT. DOOR FLOOR.

3. WINDOW MUST MEET THE U-VALUE OR 'CLASS' REQUIREMENT FOR THE APROPRIATE ENERGY PATH AND BE LABELED ACCORDINGLY. SITE BUILT WINDOWS MAY BE USED PROVIDED THEY MEET THE CRITERIA AS OUTLINED IN 2021 ORSC. SEC N1111.4

4. WINDOWS ARE TO BE TEMPERED IF THEY ARE WITHIN 18 INCHES OF THE FLOOR, WITHIN A 24 INCH ARCH OF ANY DOOR IN A CLOSED POSITION, GLAZING USED IN RAILINGS, GLAZING IN FIXED OR SLIDING DOORS, WHERE THE BOTTOM EDGE IS WITHIN 60" INCHES ABOVE STAIRS, HOT TUBS, BATHTUBS, WHIRLPOOLS, AND/OR SHOWERS.

5. SKYLIGHTS ARE TO BE GLAZED WITH TEMPERED GLASS ON OUTSIDE AND LAMINATED GLASS ON INSIDE UNLESS PLEXIGLASS. GLASS TO HAVE A MAXIMUM CLEAR SPAN OF 25 INCHES. SKYLITE FRAME IS TO BE ATTACHED TO A 2 X CURB AND TO BE 4 INCHES MINIMUM ABOVE ROOF PLANE. MIN 25LBS. PSF SNOW LOAD ADDITIONAL

6. ALL TUB AND SHOWER ENCLOSURE DOORS TO BE GLAZED WITH SAFETY GLASS.

7. BATHROOMS AND UTILITY ROOMS ARE TO BE VENTED DIRECTLY TO THE OUTSIDE VIA METAL DUCTING WITH A FAN CAPABLE OR PRODUCING A MINIMUM OF 5 AIR EXCHANGES PER HOUR (50 CFM MIN.). DRYER AND RANGE HOODS ARE ALSO TO BE VENTED TO THE OUTSIDE. VENTS TO BE PROVIDED WITH BACK-DRAFT DAMPERS.

8. SMOKE DETECTORS SHALL BE INSTALLED IN EACH BEDROOM AND OUTSIDE THE IMMEDIATE VICINITY OF EACH BEDROOM AREA AND ON EACH STORY OF THE DUELLING. ALL DETECTORS SHALL BE INTERCONNECTED TO MAIN POWER SOURCE AS THE PRIMARY POWER AND BATTERY BACKUP AS SECONDARY POWER. ACTUATION OF ONE ALARM WILL ACTIVATE ALL THE ALARMS AND WILL BE AUDIBLE IN ALL BEDROOMS.

9. ELECTRICAL RECEPTACLES IN BATHROOMS, KITCHENS, EXTERIOR LOCATIONS AND GARAGES SHALL BE G.F.I.C. PER NATIONAL ELECTRICAL CODE REQUIREMENTS.

10. RECESSED LIGHT FIXTURES ARE NOT PERMITTED IN ANY INSULATED CAVITY UNLESS THE FIXTURES ARE LABELED AS BEING SUITABLE (I.C. LABEL) FOR DIRECT CONTACT WITH INSULATION.

11. ALL DOORS BETWEEN GARAGE AND LIVING AREAS SHALL BE ONE-HOUR FIRE RATED ASSEMBLIES WITH 1-3/4" SOLID CORE DOOR OR CODE APPROVED EQUAL WITH A SELF-CLOSING MECHANISM.

12. USE 1/2" GYPSUM BOARD IN HOUSE WALLS AND CEILINGS AND UNDER STAIRS. USE 5/8" TYPE X GYPSUM BD. ON WALLS AND CEILINGS BETWEEN GARAGE AND LIVING AREAS. PROVIDE 1/2" WATERPROOF GYPSUM BD. ABOVE ALL SHOWER AND TUB/SHOWER AND TUB/SHOWER UNITS AND IN ANY WATER SPLASH AREAS.

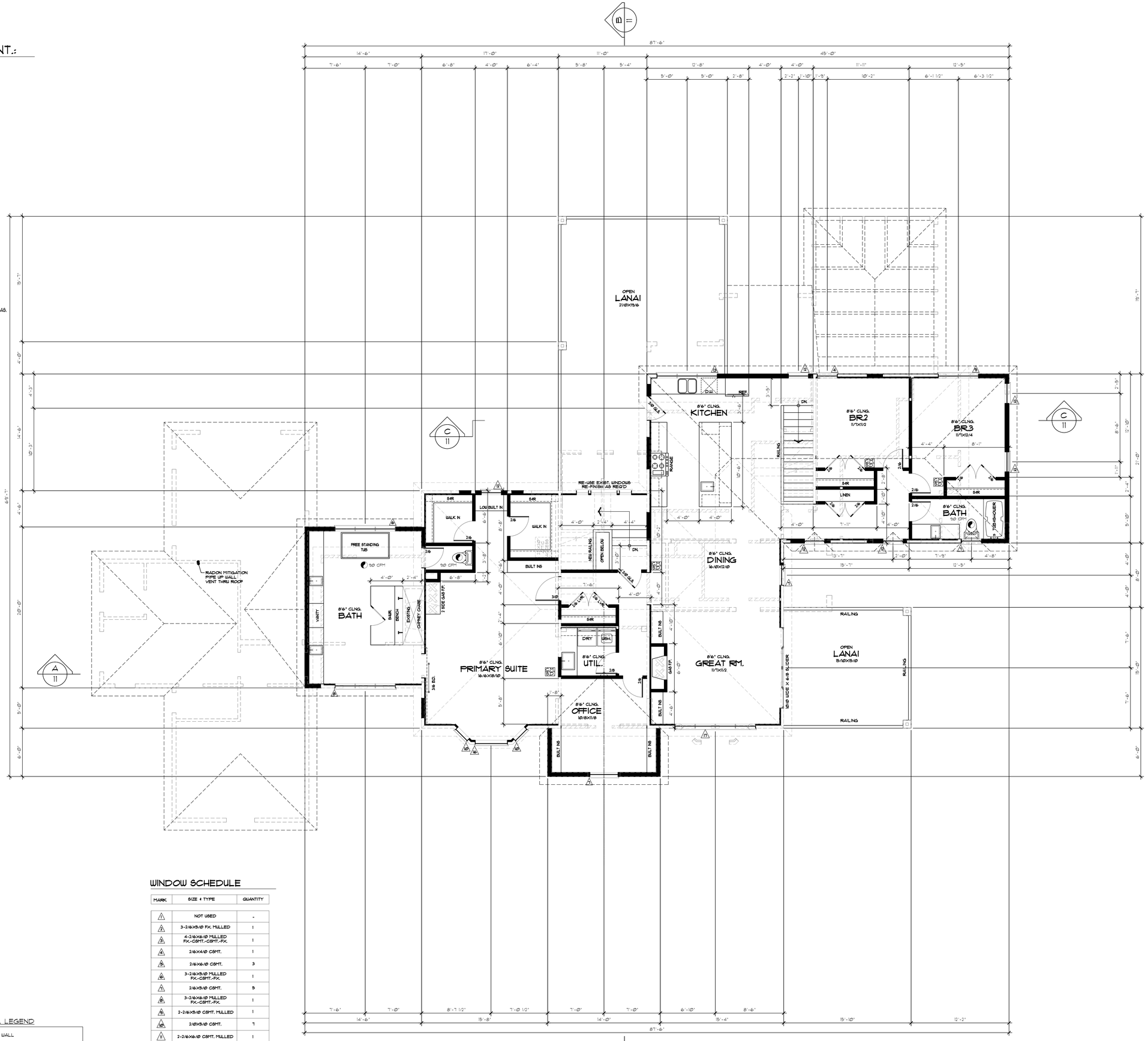
13. ALL FIREPLACE OPENINGS SHALL HAVE TEMPERED GLASS DOORS. PROVIDE OUTSIDE COMBUSTION AIR VENTS (WITH SCREENS AND BACK DAMPER) FOR FIREPLACES, WOOD STOVES AND ANY APPLIANCES WITH OPEN FLAME.

14. APPLIANCES PRODUCING A SPARK, GLOW OR FLAME CAPABLE OF IGNITING FLAMMABLE VAPORS SHALL NOT BE INSTALLED IN A GARAGE UNLESS THE PILOTS, BURNERS, HEATING ELEMENTS OR SWITCHES ARE AT LEAST 18 INCHES ABOVE THE FLOOR.

15. PROVIDE 80% MIN. EFFICIENT NATURAL GAS FURNACE WITH BACKDRAFT DAMPER AND NATURAL GAS HOT WATER HEATER WITH BACKDRAFT DAMPER. PROVIDE R-4 INSULATION AROUND HOT WATER LINES IN UNHEATED AREAS. ELEVATE FLAME IN UNITS 18" ABOVE FINISH FLOOR.

16. ALL WINDOW HDRS TO BE 4 X 10, U.N.O.

17. FRONT PORCH TO BE CONCRETE SLAB, U.N.O.



WINDOW SCHEDULE

MARK	SIZE & TYPE	QUANTITY
1	NOT USED	-
2	3-2/6X5/0 FIX. MULLED	1
3	4-2/6X6/0 MULLED FIX.-CSMT.-CSMT.-FIX.	1
4	2/6X4/0 CSMT.	1
5	2/6X6/0 CSMT.	3
6	3-2/6X6/0 MULLED FIX.-CSMT.-FIX.	1
7	2/6X5/0 CSMT.	5
8	3-2/6X6/0 MULLED FIX.-CSMT.-FIX.	1
9	2-2/6X5/0 CSMT. MULLED	1
10	2/6X5/0 CSMT.	7
11	2-2/6X6/0 CSMT. MULLED	1
12	2/6X5/0 FIX.	8
13	3-2/6X3/4 MULLED FIX.-CSMT.-FIX.	1
14	2-2/6X3/0 CSMT. MULLED	1
15	3-2/6X3/0 MULLED FIX.-CSMT.-FIX.	1
16	4/0X5/0 FIX.	3
17	4-2/6X4/0 MULLED FIX.-CSMT.-CSMT.-FIX.	1

NOTES:
- ALL WINDOWS TO HAVE GRIDS U.N.O.
- CONTRACTOR TO CONFIRM ALL WINDOW SIZES AND QUANTITIES

UPPER FLOOR PLAN

2,054 SQ. FT. EXISTING
2,402 SQ. FT. UPPER TOTAL
348 SQ. FT. NEW ADDITION

1/4"=1'-0"

IMPORTANT DISCLOSURE
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WALL LEGEND

	- NEW (N) 2x WALL
	- EXISTING (E) WALL TO BE REMOVED
	- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

ALL DIMENSIONS TO OR FROM (E) STRUCTURE ARE FOR REFERENCE ONLY. CONTRACTOR TO FIELD VERIFY ALL DIMENSIONS AND IS RESPONSIBLE TO CONTACT DESIGNER W/ANY DISCREPENCIES.

FOWLER HOME + DESIGN

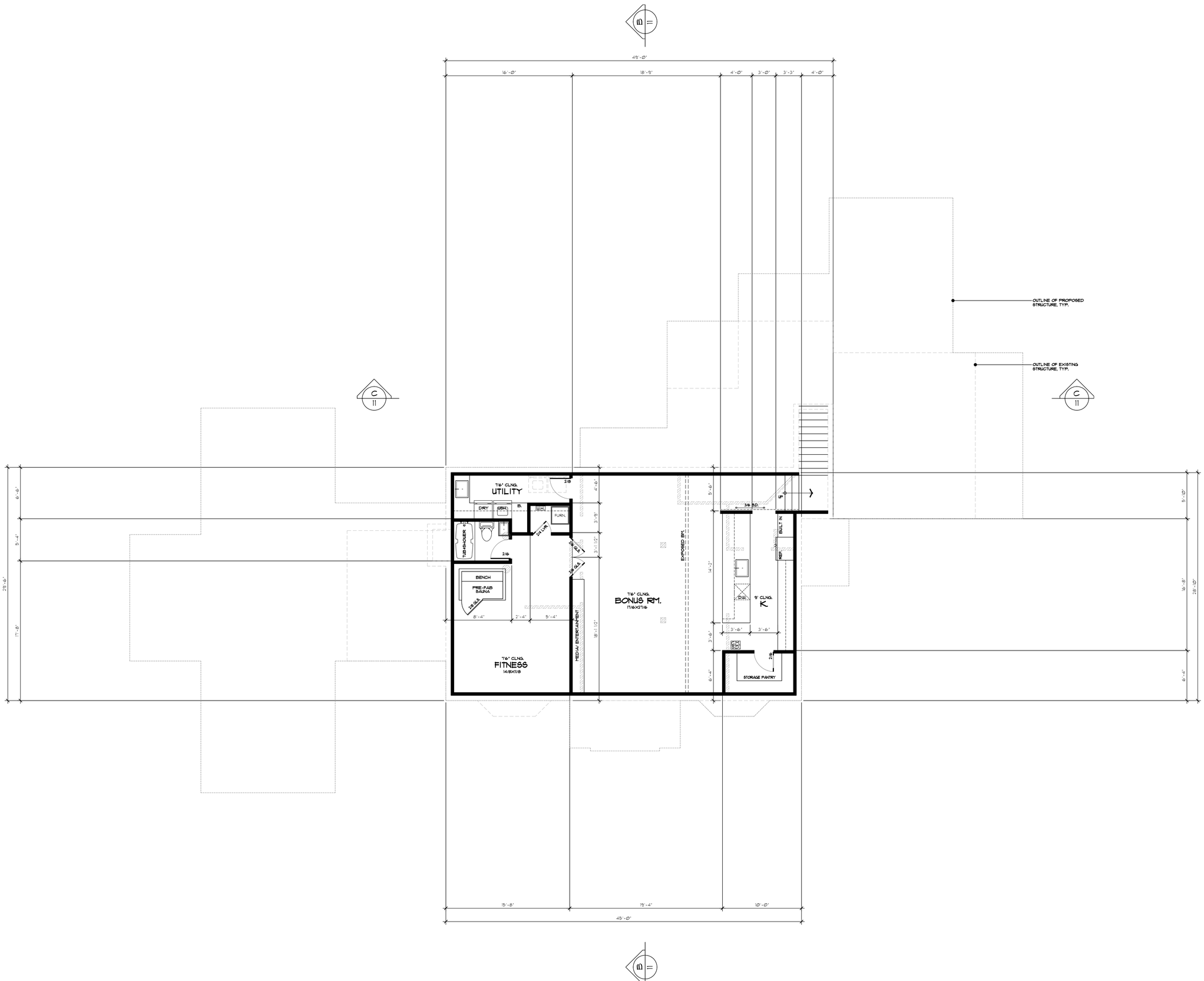
THE EKLUND RESIDENCE
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/6/2024
SCALE: 1/4"=1'-0"
FILE:

UPPER FLOOR

5.1

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LOWER FLOOR PLAN

1,226 SQ. FT. EXISTING

1/4" = 1'-0"

WALL LEGEND

	- NEW (N) 2x WALL
	- EXISTING (E) WALL TO BE REMOVED
	- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

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IMPORTANT DISCLOSURE
- PLEASE READ:

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FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
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SCALE: 1/4"=1'-0"
FILE:

LOWER FLOOR

6

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FOUNDATION NOTES:

1. FOUNDATION FOOTINGS, CONT. FOOTING UNDER PONYWALL TO BEAR ON UNDISTURBED SOIL WITH MINIMUM DEPTH OF BOTTOM OF FOOTING TO BE 18" BELOW FINAL GRADE. SOIL BEARING PRESSURE ASSUMED TO BE 1500 PSF.
2. ALL EXCESS FRAMING MATERIAL TO BE EXPORTED FROM THIS SITE TO AN APPROVED DISPOSAL LOCATION.
3. EXCAVATE SITE TO PROVIDE A MINIMUM OF 18" CLEARANCE UNDER ALL GIRDERS.
4. CLEAN ALL FOOTING EXCAVATIONS OF LOOSE AND ORGANIC MATERIALS.
5. MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
6. DO NOT BACKFILL FOUNDATION WALLS UNTIL MAIN FLOOR INCLUDING SUB-FLOORING AND WALL DIAPHRAGMS ARE IN PLACE AND FULLY NAILED AND ANCHORED AND FOUNDATION WALLS HAVE BEEN CAST AND CURED.
7. CONCRETE:

BASEMENT AND FOUNDATIONS WALLS AND FOOTINGS NOT EXPOSED TO WEATHER.	6 SACK/YD.	4" MAX. SLUMP	3000 PSI
BASEMENT AND INTERIOR SLABS ON GRADE.	6 SACK/YD.	4" MAX. SLUMP	3000 PSI
BASEMENT AND INTERIOR SLABS ON GRADE.	6 SACK/YD.	4" MAX. SLUMP	3000 PSI
BASEMENT WALLS, FOUNDATIONS AND FOOTINGS EXPOSED TO WEATHER.	6 SACK/YD.	4" MAX. SLUMP	3000 PSI
PORCHES, STEPS, CARPORT AND OTHER EXTERIOR SLABS DIRECTLY EXPOSED TO WEATHER. 5% - 7% MAX. AIR ENTRAINED.	7 SACK/YD.	4" MAX. SLUMP	3500 PSI

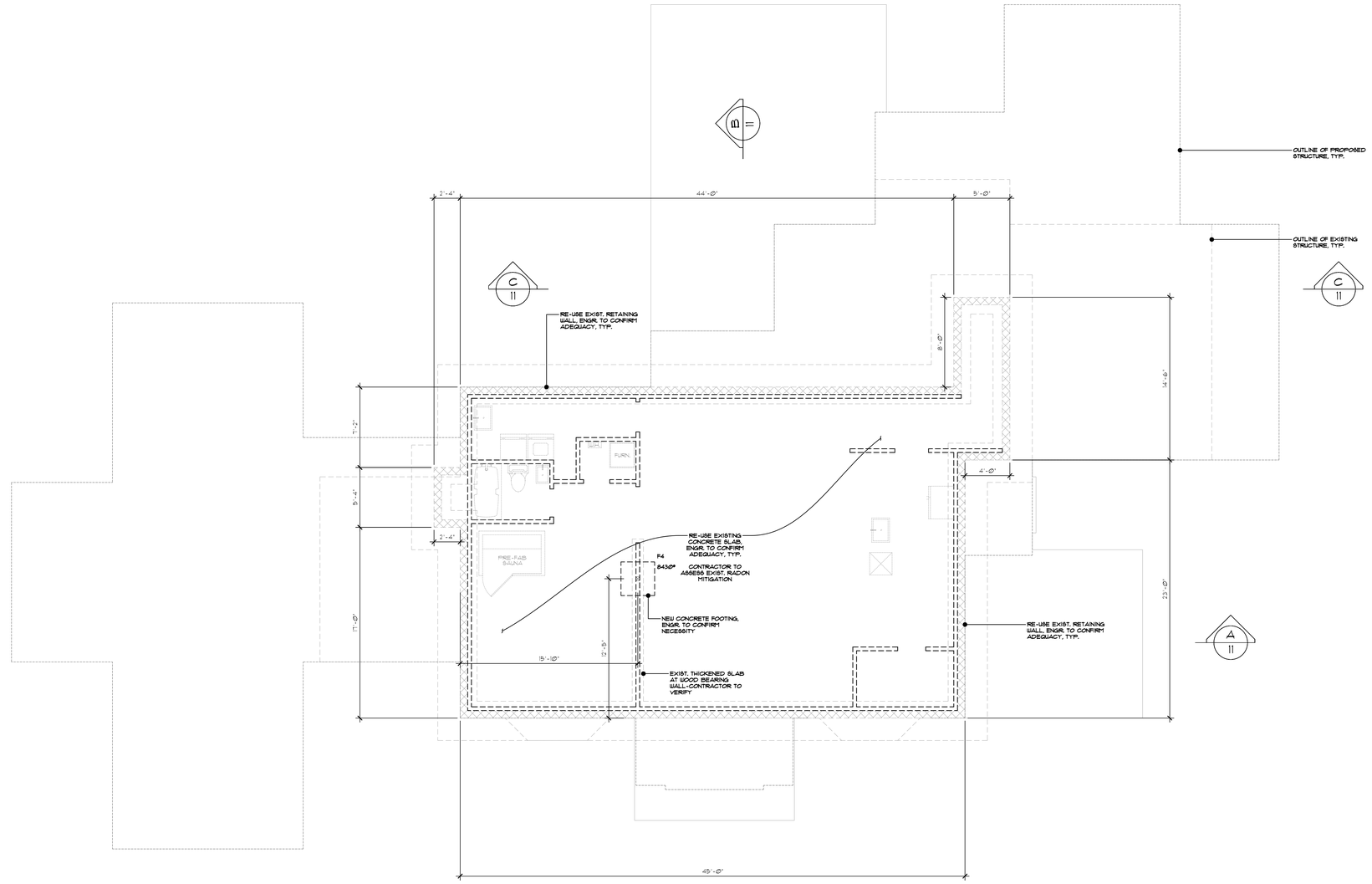
8. ALL CONCRETE SHALL DEVELOPE A MINIMUM COMPRESSIVE STRENGTH AT 28 DAYS.
9. ALL CONCRETE FORMS, SHORING AND POURING METHODS SHALL CONFORM TO CURRENT A.C.I. STANDARDS.
10. ALL FOUNDATIONS TO BE 8" CONCRETE WALLS ON 16" X 8" MIN. CONCRETE FOOTINGS REFER TO FOUNDATION PLAN FOR ADDITIONAL REQUIREMENTS. ALL FOUNDATIONS OVER 48" HIGH REQUIRE TO BE ENGINEERED CONCRETE WALLS AND FOOTINGS.
11. ALL FILL UNDER GRADE SUPPORTED SLABS TO BE A MINIMUM OF 4" GRANULAR MATERIAL (3/4"-0") COMPACTED TO 95% MINIMUM.
12. CONCRETE SLABS TO HAVE TOOLED CONTROL JOINTS AT 15 FT. MAXIMUM INTERVALS EACH WAY.
13. CONCRETE SIDEWALKS TO HAVE 3/4" TOOLED JOINTS AT 5 FT. O.C. MINIMUM.
14. PROVIDE (5) 18" X 8" CLOSEABLE SCREENED FOUNDATION AIR VENTS WITH 1/8" CORROSION RESISTANT SCREENED WIRE MESH. SPACE WITHIN 36" OF OUTSIDE CORNERS AND EQUALLY DISTRIBUTED AROUND PERIMETER OF CRAWLSPACE. (A MINIMUM OF ONE (1) SQUARE FOOT OF VENTILATION AREA FOR EACH 150 SQ. FT. OF CRAWL AREA REQUIRED.).
15. PROVIDE 1/2" DIA. X 10" ANCHOR BOLTS ASTM GRADE # 6'-0" O.C. U.N.O. ON PRESSURE TREATED DF NO. 3 MUD SILLS. ANCHOR BOLTS TO BE 7" MINIMUM EMBEDMENT INTO CONCRETE WALLS. AT LEAST TWO (2) BOLTS ARE REQUIRED ON EACH SILL AND 12" MINIMUM FROM SILL SPLICES. PROVIDE FOAM INSUL. BTWN SILL PL. & FOUND. WALL
16. REFER TO SIMPSON SPECIFICATIONS FOR BOLT DIAMETER AND MINIMUM EMBEDMENT LENGTH ON ALL ANCHOR BOLTS AND SIMPSON STRAP-TIE HOLDOWNS.
17. REBAR SCHEDULE:

    REBAR TO BE LOCATED AT HOLDOWN LOCATIONS ONLY OR AS SHOWN ON PLAN OR REQUIRED BY CODE.

    MINIMUM REQUIREMENTS WHERE REBAR IS REQUIRED.

    FOOTINGS: (1) #4 BAR HORIZONTAL CONTINUOUS, 4" CLEAR BOTTOM.

    FOUNDATIONS: (1) #4 BAR TOP HORIZONTAL WITH #4 BARS VERTICAL AT 48" O.C. HOOKED AND TIED TO FOOTING BARS AND TIED TO TOP FOUNDATION BAR.
18. REINFORCING BARS TO BE DEFORMED BARS CONFORMING TO A.S.T.M. A-615 GRADE 60. WELDED WIRE MESH TO BE A-185.
19. REINFORCEMENT SHALL BE ACCURATELY PLACED AND SUPPORTED BY CONCRETE, METAL, OR OTHER APPROVED CHAIRS, SPACERS, OR TIES AND SECURE AGAINST DISPLACEMENT DURING CONCRETE PLACEMENT.
20. REINFORCEMENT SHALL BE BENT COLD AND SHALL NOT BE WELDED.
21. ALL LAPS AND SPLICES ON #4 REBAR TO BE 24" MINIMUM, U.N.O.
22. "STTB" ANCHOR BOLTS TO BE INSTALLED PER MANUF. PRIOR TO POURING FOOTINGS.
23. EXTEND HEIGHT TO FRONT GARAGE CONCRETE STEM WALLS SO THE TOP OF WALL TO TOP OF GARAGE DOOR HEADER DOES NOT EXCEED 8'-0" MAX.
24. GARAGE FLOOR TO BE 4" 3500 PSI MINIMUM CONCRETE SLAB ON 4" MINIMUM CLEAN COMPACTED FILL WITH A 2" SLOPE (1/8" PER FT. MIN.) TOWARD OPENING AS REQUIRED FOR DRAINAGE. PROVIDE TOOLED CONTROL JOINTS AT APPROXIMATELY 10FT. O.C. EA. WAY.
25. PROVIDE (1) MIN. 3" DIA. X 36" HIGH STEEL PROTECTIVE POST IN FRONT OF FURNACE AND HOT WATER HEATER IN A 12" DIA. X 24" DEEP CONCRETE FOOTING. (INSTALL IF REQUIRED FOR PROTECTION FROM CARS). SEE DET. 8/D1
26. PROVIDE BLOCK OUTS FOR DRYER VENTS AND 18" X 18" BLOCK OUT AT FOUNDATION WALL FOR MECH. PLENUM. VERIFY SIZE AND PLACEMENT WITH BUILDER/ AND OR SUBCONTRACTORS PRIOR TO INSTALL.
27. PROVIDE A 3" DIA. PVC PIPE IN FOUNDATION WALL FOR ELECTRICAL SERVICE. VERIFY PLACEMENT WITH WITH BUILDER/ SUBCONTRACTOR.
28. PROVIDE A 4" DIA. PVC LOW POINT CRAWL SPACE DRAIN THROUGH FOUNDATION WALL BLOCKOUT. DRAIN TO BE SLOPED FOR GRAVITY DRAINAGE AND CONNECTED TO AN APPROVED STORM DRAIN SYSTEM.
29. COVER ENTIRE CRAWL AREA WITH 6-MIL BLACK POLYETHYLENE VAPOR BARRIER AND EXTEND UP WALLS TO MUD SILLS. LAP SEAMS 12" MIN.
30. ALL WOOD IN CONTACT WITH CONCRETE TO BE PRESSURE TREATED AND/OR PROTECTED BY 55# FELT MOISTURE BARRIER.
31. ALL GIRDERS AND BEAM POCKETS TO HAVE A 1/2" AIR SPACE AT SIDE AND END WITH A 3" MIN BEARING ON CONCRETE PLACED ON A 55# ASPHALT SHINGLE.
32. ALL HOLDOWNS, JOIST HANGERS AND BEAM HANGERS TO BE 'SIMPSON' OR EQUAL.
33. PROVIDE A 24" X 30" CRAWL ACCESS (18"X24" MIN.) FROM OUTSIDE OR THROUGH FLOOR. PIPES, DUCTS AND OTHER CONSTRUCTION MUST NOT OBSTRUCT THE ACCESS.
34. FLOOR CONSTRUCTION TO BE:
    1 1/8" DECKING OR EQUAL ON I-JOISTS PER MANUF.
    ON 2X6 PONYWALLS OVER 8X16 CONTINUOUS FOOTINGS



FOOTING SCHEDULE

FTNG.	LOAD LBS	FOOTING SIZE	REBAR
F1	3,300#	18"X18"X10"	(2) #4 E/W
F2	6,000#	24"X24"X10"	(2) #4 E/W
F3	9,300#	30"X30"X10"	(3) #4 E/W
F4	13,500#	36"X36"X12"	(3) #4 E/W
F5	18,300#	42"X42"X12"	(4) #4 E/W
F6	24,000#	48"X48"X12"	(4) #4 E/W
F7	28,000#	52"X52"X12"	(5) #4 E/W
F8	40,000#	64"X64"X14"	(5) #4 E/W
F9	50,000#	72"X72"X16#	(6) #4 E/W

TOP OF ALL HOLD DOWN BOLTS MUST EXTEND ABOVE WASHERS AND NUTS (APPROX. 6" ABOVE TOP OF PNDN. WALL).

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SEE STRUC. ENGR. SHEETS

CONTRACTOR TO CONFIRM EXIST. CONDITIONS, & INFORM DESIGNER OF ANY DISCREPANCIES, TYP.

LOWER FLOOR FRAMING & FDN PLAN

1/4" = 1'-0"

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/1/2024
SCALE: 1/4" = 1'-0"
FILE:

FOUNDATION PLAN

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2. ALL EXCESS FRAMING MATERIAL TO BE EXPORTED FROM THIS SITE TO AN APPROVED DISPOSAL LOCATION.
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4. CLEAN ALL FOOTING EXCAVATIONS OF LOOSE AND ORGANIC MATERIALS.
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15. PROVIDE 1/2" DIA X 10" ANCHOR BOLTS A307 GRADE @ 6'-0" O.C. U.N.O. ON PRESSURE TREATED DF NO. 2 MUD SILLS. ANCHOR BOLTS TO BE 7" MINIMUM EMBEDMENT INTO CONCRETE WALLS. AT LEAST TWO (2) BOLTS ARE REQUIRED ON EACH SILL AND 12" MINIMUM FROM SILL SPLICES. PROVIDE FOAM INSUL. BTWN SILL PL. & FOUND. WALL
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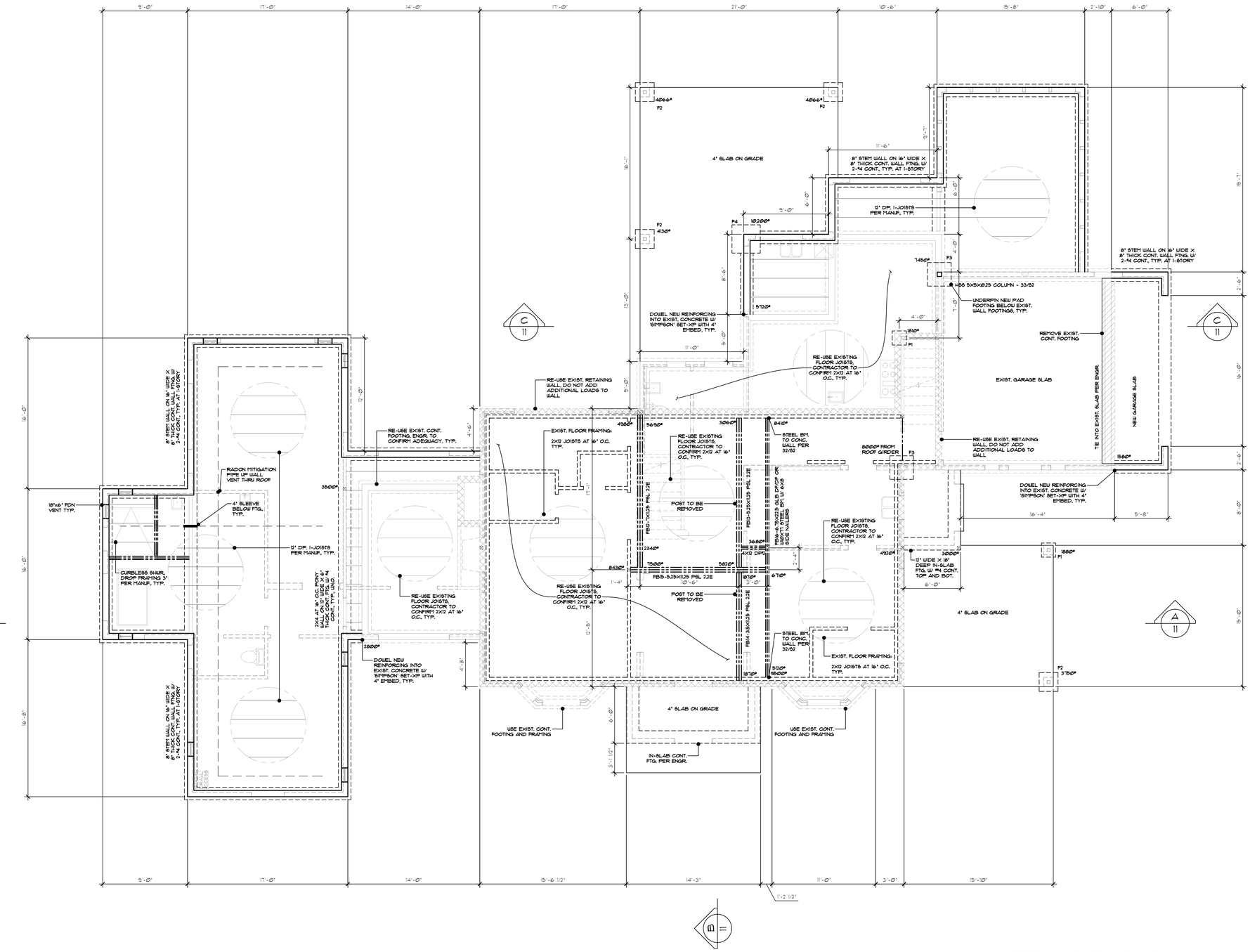
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23. EXTEND HEIGHT TO FRONT GARAGE CONCRETE STEM WALLS SO THE TOP OF WALL TO TOP OF GARAGE DOOR HEADER DOES NOT EXCEED 8'-0" MAX.
24. GARAGE FLOOR TO BE 4" 3500 PSI MINIMUM CONCRETE SLAB ON 4" MINIMUM CLEAN COMPACTED FILL WITH A 2" SLOPE (1/8" PER FT. MIN.) TOWARD OPENING AS REQUIRED FOR DRAINAGE. PROVIDE TOOLED CONTROL JOINTS AT APPROXIMATELY 10FT. O.C. EA. WAY.
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26. PROVIDE BLOCK OUTS FOR DRYER VENTS AND 18" X 18" BLOCK OUT AT FOUNDATION WALL FOR MECH. PLENUM. VERIFY SIZE AND PLACEMENT WITH BUILDER/ AND OR SUBCONTRACTORS PRIOR TO INSTALL.
27. PROVIDE A 3" DIA. PVC PIPE IN FOUNDATION WALL FOR ELECTRICAL SERVICE. VERIFY PLACEMENT WITH WITH BUILDER/ SUBCONTRACTOR.
28. PROVIDE A 4" DIA. PVC LOW POINT CRAWL SPACE DRAIN THROUGH FOUNDATION WALL BLOCKOUT. DRAIN TO BE SLOPED FOR GRAVITY DRAINAGE AND CONNECTED TO AN APPROVED STORM DRAIN SYSTEM.
29. COVER ENTIRE CRAWL AREA WITH 6-MIL BLACK POLYETHYLENE VAPOR BARRIER AND EXTEND UP WALLS TO MUD SILLS. LAP SEAMS 12" MIN.
30. ALL WOOD IN CONTACT WITH CONCRETE TO BE PRESSURE TREATED AND/OR PROTECTED BY 55# FELT MOISTURE BARRIER.
31. ALL GIRDERS AND BEAM POCKETS TO HAVE A 1/2" AIR SPACE AT SIDE AND END WITH A 3" MIN BEARING ON CONCRETE PLACED ON A 55# ASPHALT SHINGLE.
32. ALL HOLDOWNS, JOIST HANGERS AND BEAM HANGERS TO BE 'SIMPSON' OR EQUAL.
33. PROVIDE A 24" X 36" CRAWL ACCESS (18"X24" MIN.) FROM OUTSIDE OR THROUGH FLOOR. PIPES, DUCTS AND OTHER CONSTRUCTION MUST NOT OBSTRUCT THE ACCESS.
34. FLOOR CONSTRUCTION TO BE:
    1 1/8" DECKING OR EQUAL ON I-JOISTS PER MANUF.
    ON 2x6 PONYWALLS OVER 8X16 CONTINUOUS FOOTINGS

FDN VENTILATION CALCULATIONS:

VENTILATION REQUIRED IN CRAWL SPACE AREA:
948 SQ. FT. X 144 SQ. IN. - 1/150 = 910 TOTAL SQ. IN. REQUIRED

LOCATION:	REQ. SQ. IN.	NO. OF VENTS:	VENT SIZE:	TOTAL SQ. IN.:
FDN.	910	9	108 sq/in.	972

TOP OF ALL HOLD DOWN BOLTS MUST EXTEND ABOVE WASHERS AND NUTS (APPROX. 6" ABOVE TOP OF FNDN. WALL.)



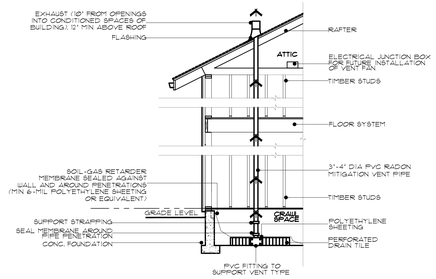
FOOTING SCHEDULE

FTNG.	LOAD LBS	FOOTING SIZE	REBAR
F1	3,300#	18"X18"X10"	(2) #4 E/W
F2	6,000#	24"X24"X10"	(2) #4 E/W
F3	9,300#	30"X30"X10"	(3) #4 E/W
F4	13,500#	36"X36"X12"	(3) #4 E/W
F5	18,300#	42"X42"X12"	(4) #4 E/W
F6	24,000#	48"X48"X12"	(4) #4 E/W
F7	28,000#	52"X52"X12"	(5) #4 E/W
F8	40,000#	64"X64"X14"	(5) #4 E/W
F9	50,000#	72"X72"X16#	(6) #4 E/W

MAIN FLOOR FRAMING & FDN PLAN

1/4"=1'-Ø"

SUB-MEMBRANE DEPRESSURIZATION SYSTEM FOR CRAWL SPACE



RADON CONTROL METHOD C.

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SEE STRUC. ENGR. SHEETS

SEE JOIST ENGR. SHEETS FROM MANUF.

CONTRACTOR TO CONFIRM EXIST. CONDITIONS, & INFORM DESIGNER OF ANY DISCREPANCIES, TYP.

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
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MAIN FL. FRAMING & FDN PLAN

8

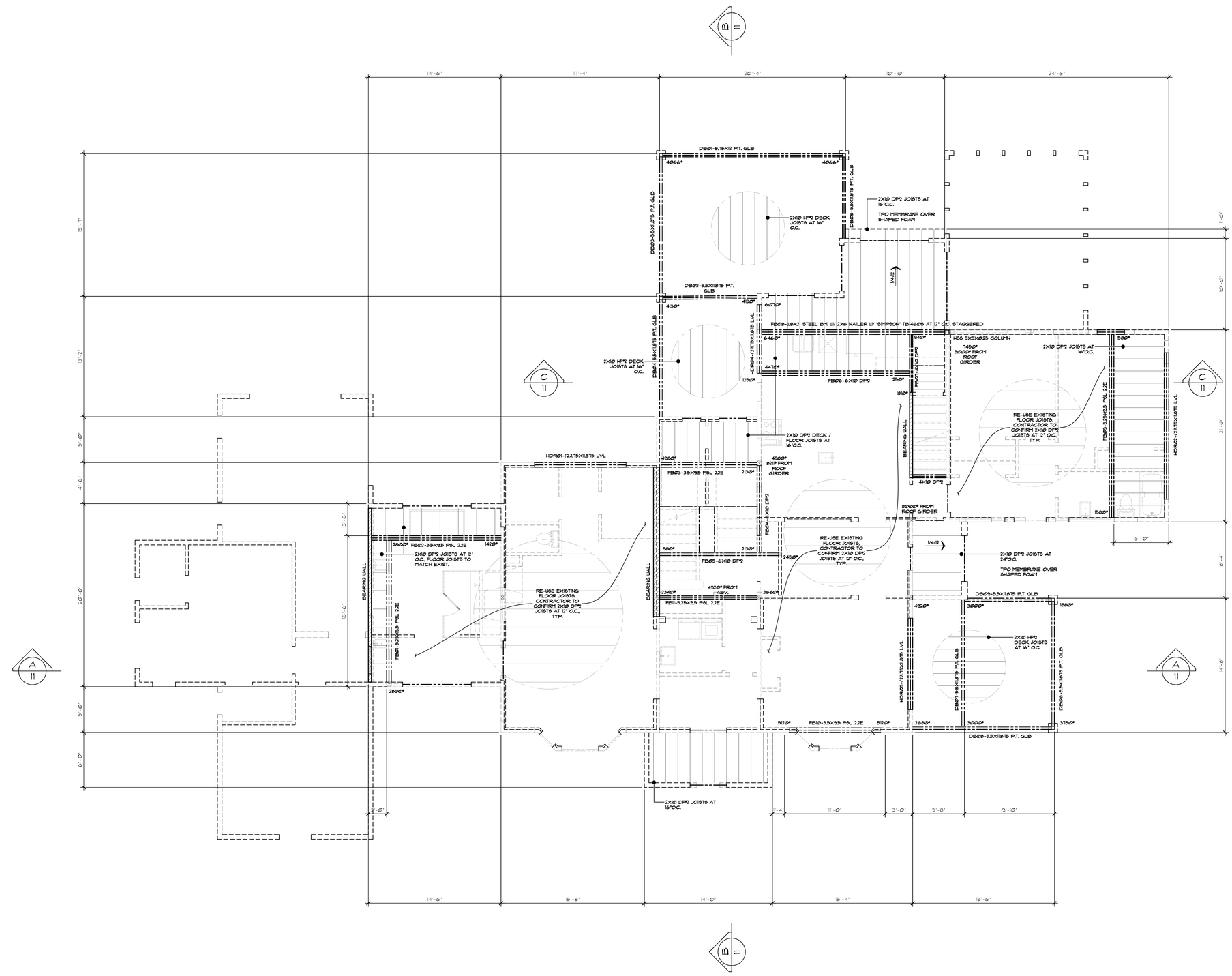
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FLOOR FRAMING NOTES:

1. SEE FLOOR JOIST OR TRUSS MANUF. SHEETS.
2. FLOOR JOIST SPANS ARE BASED ON A 40# L.L. + 15# D.L. + 55# T.L. DEFLECTION LIMITED
3. PROVIDE BLOCK OUTS FOR DOWN DRAFT COOK TOPS, DRYER VENTS, MECH. FLUES, AND ACCESSES. VERIFY SIZE AND PLACEMENT WITH BUILDER/ SUBCONTRACTORS PRIOR TO INSTALL.
4. ALL WOOD IN DIRECT CONTACT WITH CONCRETE TO BE PRESSURE TREATED AND/OR PROTECTED BY 55# FELT MOISTURE BARRIER.
5. ALL GIRDERS IN CONCRETE BEAM POCKETS TO HAVE A 1/2" AIR SPACE AT SIDES AND ENDS WITH A 3" MIN. BEARING ON CONCRETE PLACED ON A 55# FELT MOISTURE BARRIER.
6. ALL HOLDOWNS, JOIST HANGERS AND BEAM HANGERS TO BE 'SIMPSON' OR EQUAL.
7. REFER TO BOISE CASCADE TECHNICAL SUPPORT FOR BEAMS & HEADER HANGERS.
8. PROVIDE SOLID BLOCKING UNDER ALL UPPER LEVEL BEARING WALLS OR AS SHOWN ON PLAN.
9. PROVIDE A CONTINUOUS RIM JOIST AROUND PERIMETER OF EXTERIOR WALLS. RIM JOIST TO BE OF THE SAME SIZE AND MATERIAL TYPE AS FLOOR JOISTS UNLESS OTHERWISE NOTED. FASTEN RIM JOISTS TO WALL BELOW WITH AT LEAST 16D TOE-NAILS AT 8" O.C.
10. PROVIDE 1 1/8" T & G CDX (APA 32/16) PLYWOOD OR APPROVED EQUAL SUB-FLOOR SHEATHING. GLUE AND FASTEN SHEATHING WITH 10D COMMON NAILS AT 6" O.C. AT ALL EDGES AND 10D COMMON NAILS AT 12" O.C. AT ALL INTERMEDIATE FRAMING MEMBERS.
11. SUB-FLOOR SHEATHING TO EXTEND OUTWARD TO ALL PERIMETER EXTERIOR WALLS BELOW.
12. VERIFY LOCATION OF ALL PLUMBING DRAINS AND OFFSET FLOOR JOISTS UP TO 3" O.C. MAXIMUM TO AVOID NOTCHING AND CUTTING OF JOISTS.
13. BEARING FOR JOISTS, SUPPORT MEMBERS, HEADERS AND BEAMS TO BE 1/2 THE MEMBERS WIDTH AND SOLID BEARING TO FOOTINGS. 2 X JOISTS TO HAVE 1-1/2" MIN. BEARING.
14. DO NOT NOTCH, BORE OR DRILL THROUGH ANY SUPPORT COLUMNS, GIRDERS, BEAMS, JOIST SUPPORTING BEARING WALLS OR ANY OTHER CONCENTRATED LOAD BEARING MEMBER UNLESS SPECIFICALLY NOTED ON PLANS. CONTACT DESIGNER IF QUESTIONS ARISE.
15. PROVIDE DOUBLE RIM JOISTS AT ALL EXTERIOR WALLS PARALLEL TO JOISTS AND AS SHOWN ON PLAN.
16. LAP FLOOR JOISTS A MINIMUM OF 6" EACH WAY AT ALL INTERIOR BEARING MEMBERS. NAIL LAPS WITH (3) 16D AND TO BEARING MEMBER WITH (3) 16D.
17. JOISTS SHALL BE SUPPORT LATERALLY BY BLOCKING OR BRIDGING AT JOIST MID-SPAN AT INTERVALS NOT EXCEEDING 10 FEET.

SYMBOLS LEGEND:

- ⊠ — DENOTES (2) CRIPPLE STUDS (2x WIDTH OF WALL) U.N.O.
- B — BEAM SCHEDULE CALLOUT.
- BEARING WALL DETAIL.
- 1/D1 — DETAIL CALLOUT OVER SHEET #.
- 4X10 HEADER (U.N.O.)



UPPER FLOOR FRAMING PLAN

1/4" = 1'-0"

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SEE STRUC. ENGR. SHEETS

CONTRACTOR TO CONFIRM EXIST. CONDITIONS, & INFORM DESIGNER OF ANY DISCREPANCIES, TYP.

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/1/2024
SCALE: 1/4"=1'-0"
FILE:

UPPER FL. FRAMING PLAN

9

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ROOF FRAMING NOTES:

1. ROOFING MATERIAL TO BE 15# STANDING SEAM METAL ROOF AND ARCHITECTURAL COMPOSITION ROOFING WITH RAIN AND ICE SHIELD. NAILING PER MANUFACTURED INSTRUCTIONS FOR AN 80 MPH MIN. WIND AREA.
2. ROOF PITCH AS SHOWN ON PLAN.
3. ROOF DESIGN TO BE MANUFACTURED ROOF TRUSSES @ 24" O.C., U.N.O. MANUFACTURER TO SUPPLY DESIGN, ENGINEERING SPECIFICATIONS AND LAYOUT.
4. MANUFACTURED TRUSSES SHALL BE LATERALLY BRACED ACCORDING TO APPROPRIATE MANUFACTURE'S ENGINEERED DESIGN.
5. TRUSS MEMBERS SHALL NOT BE NOTCHED, BORED, DRILLED THROUGH OR ALTERED UNLESS DESIGNED BY AND SHOWN ON MANUFACTURERS SPECIFICATIONS.
6. ALL RAFTERS& CEILING JOISTS TO BE 2 X DF-L #2 OR BETTER AS PER TABLE NOTED BELOW AND PER ROOF FRAMING PLAN. SPAN DISTANCE BASED ON SIMPLE UNIFORM LOADING AND PER O.R.S.C. 2021 TABLES R802.4(2) & R802.5(1/3).
7. ALL HIPS, VALLEYS AND RIDGES TO BE NOT LESS IN DEPTH THAN THE CONNECTION END OF THE RAFTER, U.N.O.
8. ALL PLANT-ON VALLEYS TO BE 2 X 10 WITH (2) 16D AT EACH RAFTER/TRUSS.
9. ALL EAVE OVERHANGS TO BE CLOSED TYPE AT 24". ALL CORNICE TO BE 12", U.N.O.
10. EAVES TO BE OPEN TYPE SOFFITS WITH A 5" 'K' GALVANIZED FACIA GUTTER ON A 2 X 10 FACIA BD., U.N.O. AND 3" GALVANIZED DOWNSPOUTS (DS) AS SHOWN ON PLAN.
11. ALL BARGE RAFTERS TO BE 2 X 10 WITH A 1 X 3 BRICK MOLD U.N.O.
12. ALL RAFTER HANGERS SHALL BE OF 'SIMPSON' LSSU OR LUS TYPE, U.N.O.
13. PROVIDE (21) 61 SQ. IN. SCREENED ATTIC AIR VENTS AT RIDGE WITH 1/8" CORROSION RESISTANT SCREENED MESH AND EQUALLY SPACED AS SHOWN ON PLAN. PROVIDE (63) 20 SQ. IN. 2" X 10" SCREENED AIR VENTS AT EAVES WITH 1/8" CORROSION RESISTANT SCREENED MESH AND EQUALLY SPACED. A MINIMUM OF ONE (1) SQUARE FOOT OF VENTILATION AREA FOR EACH 150 SQ. FT. OF ATTIC SPACE AREA REQUIRED. PROVIDE 50 PERCENT AT RIDGE AND 50 PERCENT AT EAVES. REFER TO ATTIC VENTILATION CALCULATION TABLE.
15. PROVIDE POSITIVE VENTILATION AT EACH END OF EACH RAFTER/TRUSS BAY AT VAULTED CEILING AREAS. INSTALL INSULATION BAFFLES AT EACH EAVE VENT BETWEEN BAYS. BAFFLES SHALL BE MADE RIGID, WEATHER RESISTANT MATERIAL AND MAINTAIN 1" CLEAR AIR SPACE. VENTILATION IS ALSO REQUIRED AT BLOCKING LOCATIONS ABOVE PLATES.
16. ROOF DIAPHRAM TO BE CONSTRUCTED WITH 15/32" EXPOSURE 1, C-D (APA 24/0 RATED) PLYWOOD OR 1/2" 2-M-W OR 2-M-3 OSB, OR BETTER SHEATHING. LONG DIMENSION SHALL BE PERPENDICULAR AND END JOINTS SHALL BE STAGGERED. FASTEN SHEATHING WITH 8D COMMON NAILS AT 6" O.C. AT GABLE ENDS AND ALL EDGES AND 8D COMMON NAILS AT 12" O.C. AT ALL INTERMEDIATE FRAMING MEMBERS.
17. DO NOT NOTCH, BORE OR DRILL THROUGH ANY SUPPORT COLUMNS, GIRDERS, BEAMS, JOIST SUPPORTING BEARING WALLS OR ANY OTHER CONCENTRATED LOAD BEARING MEMBER UNLESS SPECIFICALLY NOTED ON PLANS. CONTACT DESIGNER IF ANY QUESTIONS ARISE.
18. PROVIDE A SIMPSON 'H-2.5' HURRICANE CLIP AT EACH RAFTER CONNECTION TO EXTERIOR WALL TOP PLATES.
19. ATTICS WITH A CLEAR HEIGHT OF 30 INCHES OR MORE MUST BE PROVIDED WITH AN ACCESS. THE ACCESS OPENING SHALL 22" X 30" MINIMUM. OPENING TO HAVE 30" MINIMUM CLEARANCE FROM TOP OF OPENING TO BOTTOM OF ROOF ALL AROUND.
20. FLASHING SHALL BE INSTALLED AT JUNCTIONS OF CHIMNEYS AND ROOFS, IN ROOF VALLEYS AND AROUND ALL ROOF OPENINGS.
21. PROVIDE 4 x 4 OR (2) 2 x 4'S LAMINATED WITH 16D @ 12" O.C. KING POSTS (KP) WHERE SHOWN ON PLAN.
22. PROVIDE PURLIN WALLS WHERE SHOWN ON ROOF PLAN. USE 2 X 4 'S @ 24" O.C. AND/OR LINED-UP UNDER EACH RAFTER. EXTEND PURLIN WALL DOWN TO BEARING MEMBER BELOW.
23. ALL RAFTERS TO BE NOTCHED (SEAT CUT) TO PROVIDE FULL BEARING AT SUPPORT MEMBERS.
24. ALL WINDOW HDRS TO BE 4 X 10, U.N.O.

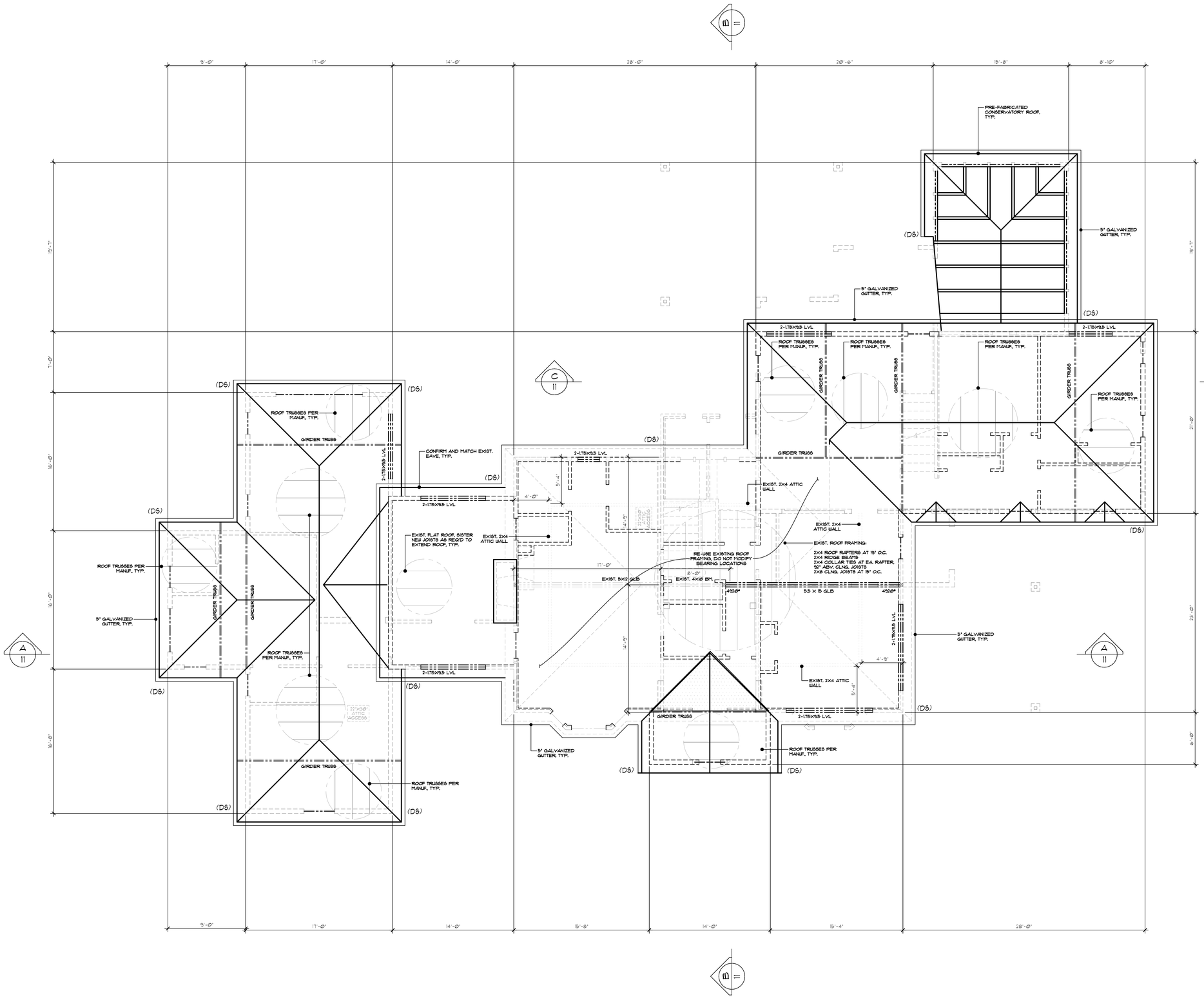
ATTIC VENTILATION CALCULATIONS:

VENTILATION REQUIRED IN ATTIC AREA:
3498 SQ. FT. X 144 SQ. IN. - 1/150 = 3358 TOTAL SQ. IN. REQUIRED

LOCATION:	REQ. SQ. IN.	NO. OF VENTS:	VENT SIZE:	TOTAL SQ. IN.:
AT RIDGE	1679	28	61 sq.in.	1708
AT EAVES	1679	84	20 sq.in.	1680
TOTAL:	3358	112	81 sq.in.	3388

SYMBOLS LEGEND:

- ⊠ — DENOTES (2) CRIPPLE STUDS (2x WIDTH OF WALL) U.N.O. 3-STUD ASSEMBLY MAY BE USED IN LIEU OF 4x4 POST 4-STUD ASSEMBLY MAY BE USED IN LIEU OF 6x6 POST
- [1] — BEAM SCHEDULE CALLOUT.
- BEARING WALL DETAIL.
- S.D. — HOUSE WIRED SMOKE DETECTOR.
- F-1 — FLOOR FRAMING DETAIL
- (DS) — DOWNSPOUT TO RAINDRAIN BELOW.
- INDICATES ROOF FRAMED OVER ROOF BELOW, USE 2X8 RAFTERS @ 24" O.C. W/ 2X10 RIDGES, & 2X10 VALLEY RAFTERS LAID FLAT ON TRUSSES BELOW.
- (KP) — 4X4 KING POST (KP) FROM HIP, VALLEY AND/OR RIDGE TO BEARING MEMBER BELOW. REFER TO DETAIL.
- D1 / 11 — DETAIL CALLOUT OVER SHEET #.
- 4X10 HEADER (U.N.O.)



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SEE TRUSS ENGR. SHEETS FROM MANUF.

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ROOF FRAMING PLAN

1/4" = 1'-0"

ALL ROOF SLOPES TO BE 8:12 U.N.O.
ALL EAVES TO BE 1'-0" U.N.O.

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

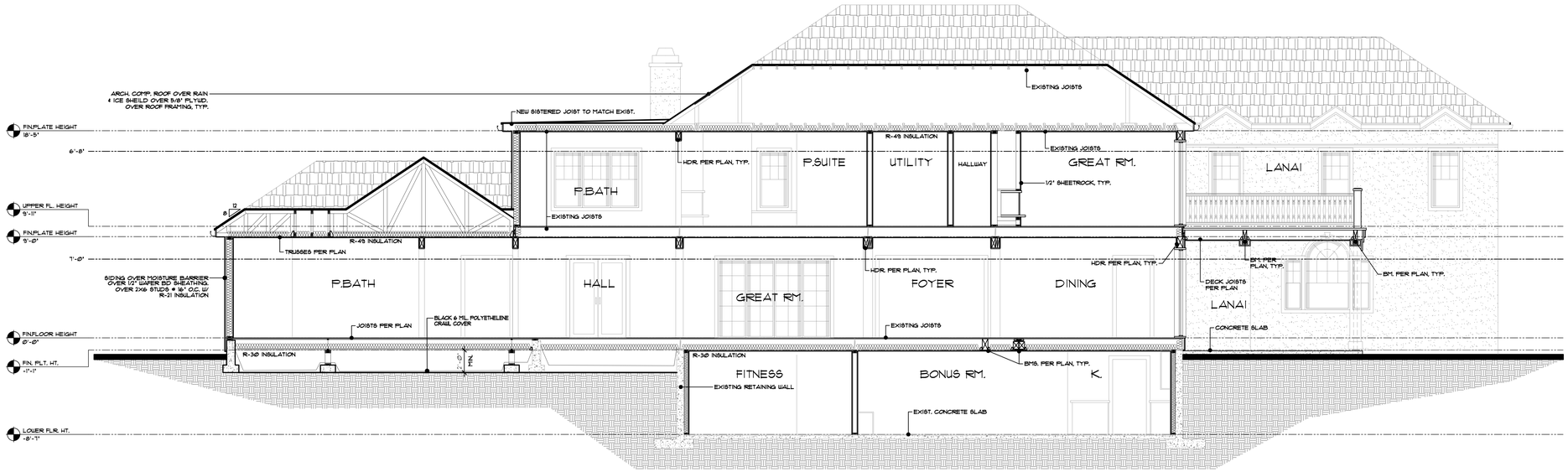
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/1/2024
SCALE: 1/4"=1'-0"
FILE:

ROOF FRAMING PLAN

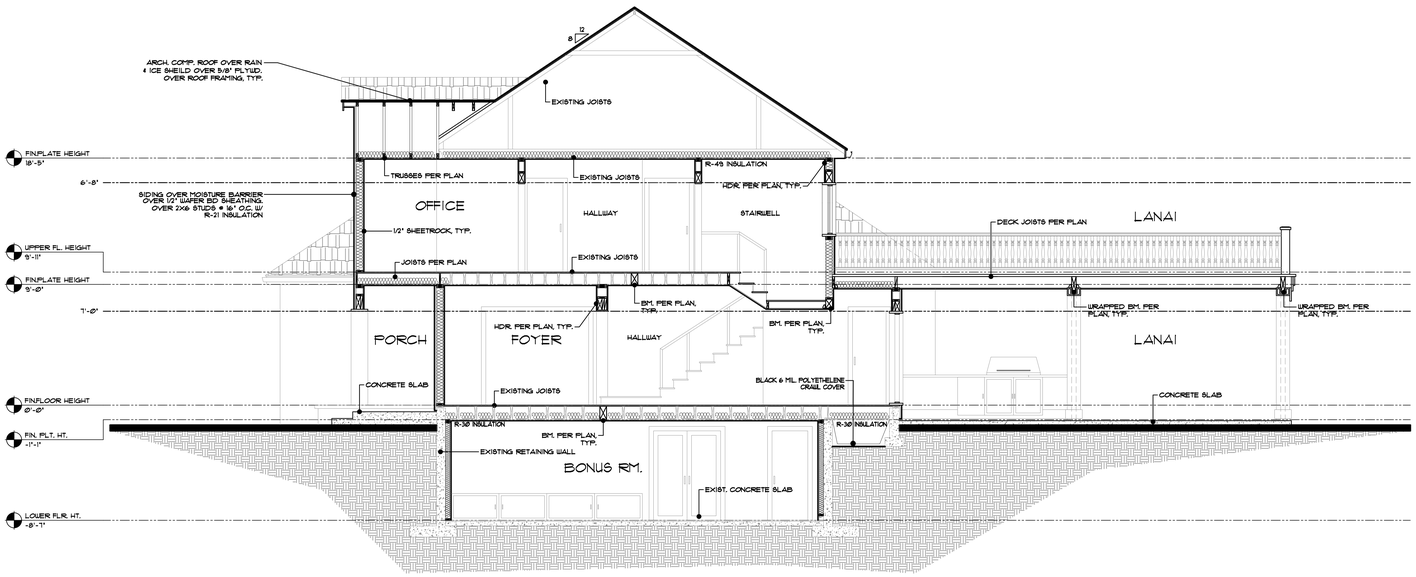
10

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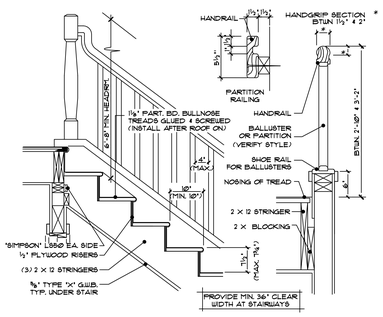
CROSS SECTION A.

1/4" = 1'-0"



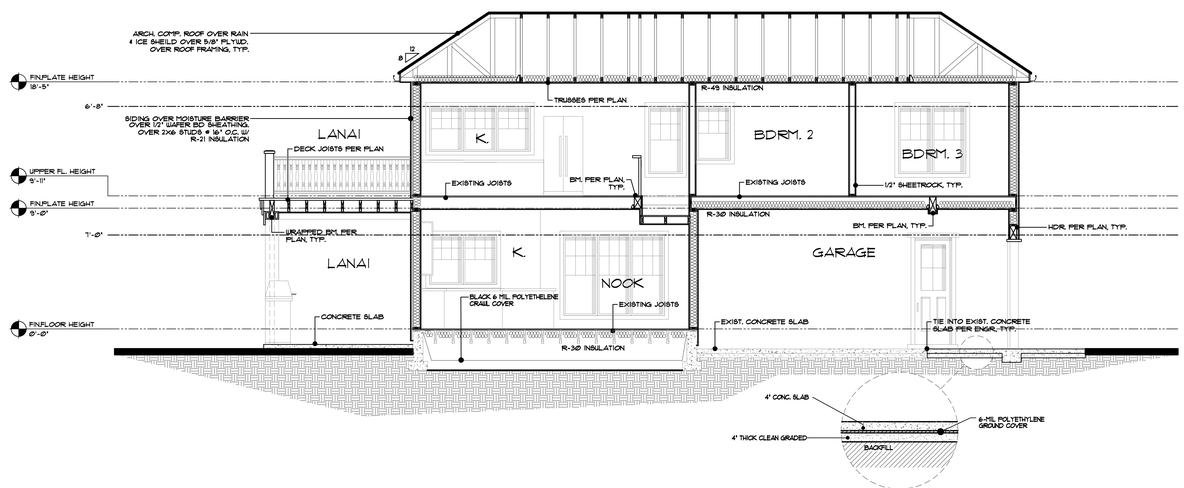
CROSS SECTION B.

1/4" = 1'-0"



STAIR DETAIL

SCALE : N.T.S.



CROSS SECTION C.

1/4" = 1'-0"

SEE STRUC. ENGR. SHEETS

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FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/7/2024
SCALE: 1/4"=1'-0"
FILE:

CROSS SECTIONS

11

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Peter Meijer Architect, PC

Historic Resource Land Use Review – Approval Criteria, Findings, and Recommendations
1620 SE Waverly Drive, Milwaukie, Oregon

Prepared for:
City of Milwaukie, Oregon
November 14, 2024

Description of the Historic Resource Land Use Review Application

The updated proposed work includes the addition of a primary wing located on the east side of the residence, the addition of a 306 sq. ft. prefabricated conservatory at the southwest side of the residence, extending the west garage wall 6 feet, and extending the south kitchen and nook walls 8.5 feet and 6 feet respectively. The total first floor additions including the conservatory is 1,436 sq. ft. A lanai and porch are proposed for the northwest corner of the house. The primary entrance column on the north elevation is proposed is extend outward just over six feet.

On the second floor, the updated proposed work includes wall extensions proposed on the east wall at the existing bath, the south wall, and west wall. Other additions to the second floor include a deck to the northwest and south. The roof of the main body of the house will remain the same height as it exists today. A hip roof is proposed for the east wing addition. Other proposed roofs maintain the existing roof slopes and do not exceed the existing maximum height.

The existing north, primary elevation, is proposed to retain some of the original building design. Changes include the design and visual qualities of some replacement windows; the design of the pediments above the second-floor windows on the west wing and the addition of a belt course; and the extension of the primary entrance column.

Description of the Historic Context and Significance of the Property

Owned by William MacMaster, this home was constructed in 1922 by the Drake-Voss Construction Company as the family's second estate within Waverly. William moved to Oregon in 1883 from Scotland as a financial representative of the Dundee Land Company. He later formed a real estate investment firm with A.H. Birrell in 1890, buying out Birrell in 1903. William co-owned the firm with his son in law beginning in 1922, renaming it to MacMaster and Ireland until William's death. During his lifetime, William was president of the Arlington Club, president of Waverly twice, and president of the Portland Chamber of Commerce twice. Annie MacMaster was the head for all of the YMCA's Pacific Northwest women's war work during World War I.

Character-defining features of this Colonial Revival home as mentioned in the 1988 Cultural Resource Inventory are as follows:

- Primary entrance with paired paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters.
- Stucco exterior cladding
- Quoining, also made of stucco

- Polygonal bays
- End wall chimney
- Palladian window
- Full-height polygonal bay window with tent roof and spandrel
- Belt course above heads of second story windows
- Rectangular plan flanked by two smaller wings on side elevations

As defined by the National Park Service, a Character Defining Feature is a prominent or distinctive aspect, quality, physical feature, or characteristic that contributes significantly to the visual character of a resource. Character Defining Features are character-defining elements that include the overall shape of the building or resource, the materials used in building the resource, the craftsmanship of the resource, the resource's decorative details, the interior spaces and architectural features, and the site and environment of a resource, also known as its context. There are four zones in regards to character-defining features: High, Medium, and Low Preservation Priority, and Non-Historic.

High Preservation Priority features are the most character-defining features of the building that best convey the significant themes associated with the building. These features are to be maintained and preserved. Alterations to finishes may be acceptable, although the form and overall design should be retained. Work to high priority features will be closely reviewed. High Preservation Priority spaces can be public or private with a high level of integrity and history of architectural finishes and features that include original materials or details of highly skilled craftsmanship. Architectural finishes and features should be preserved. Regarding 1620 SE Waverly Drive, the highest priority features are ones visible from the public right of way, including all features comprising original and proposed north elevations, and other elevations that are visible from the public right of way.

Medium Preservation Priority features help to convey the significance of the building, but are not crucial character-defining features. If a Medium Preservation Priority feature were to be removed, the building would still retain its significance, although some unique aspects may be lost. Often, the overall design aspect of the feature is of medium priority, while the finishes or materials may be of a lower priority. Work to medium priority features require design review and may elicit some commentary although contemporary methods, materials, and designs may be sensitively incorporated. The overall project should reach a balance of retaining some Medium Preservation Priority features to allow for alterations to other medium priority features. Alterations should be compatible with the overall historic character of the building. Medium Preservation Priority spaces can be public or private with a moderate level of integrity and history of architectural finishes and features that include original materials or details but are less ornate than High Preservation Priority spaces in overall character. Architectural finishes and features should be preserved. Regarding 1620 SE Waverly Drive, medium priority features are ones not visible from the public right of way, including all features comprising original and proposed south elevations, and other elevations that are not visible from the public right of way.

Low Preservation Priority features are part of the building design, but have little historic character or contribution to the historic significance of the building. Low priority features include service spaces, heavily-altered features, or additions not associated with the period of significance. Alterations to Low Preservation Priority features, while sympathetic to the historic qualities and character of the building,

may incorporate extensive changes or total replacement through the introduction of contemporary methods, materials, and designs. Proposed work to Low Preservation Priority features will still be reviewed in order to monitor the impact to the overall character and significance of the building. Low Preservation Priority spaces are often not public areas but can be private spaces with minimal integrity and history of architectural finishes and features that contain few or no architectural features that need to be preserved or restored as part of a rehabilitation project. Regarding 1620 SE Waverly Drive, there are no low priority features on the exterior of the building. Since the 1988 Cultural Resource Inventory, no significant exterior changes that have required Historic Resource Land Use Review have been made to the building and, to the best of our knowledge, the building retains all of its significant historic character-defining features.

Non-historic features include architectural features or finishes that are not original to the historic building. Non-historic features primarily include walls and doors that are not considered historic, as well as other features that have been changed or added to the building after initial construction. These elements can be removed and altered with minimal care given to minimize impact. Within the City of Milwaukie, certain alterations to historic buildings do not need to be reviewed through the Historic Resource Land Use Review system. These alterations include the repair or replacement of roof materials either in kind or with similar materials, the application of storm windows, etc. While these changes may have been added to 1620 SE Waverly Drive, there are no other non-historic features of finishes present on the building.

Approval Criteria

Milwaukie Zoning Ordinance Title 19, Chapter 19.400 Overlay Zones and Special Areas governs the "identification, protection, enhancement, perpetuation, and use of site, structures, districts, objects, and buildings within the City that reflect the City's unique architectural, archaeological, and historical heritage, and to facilitate preservation of such properties." Any exterior alteration of a "significant" landmark is reviewed under the provisions of Subsection 19.403.5, Alterations and Development, and application is submitted to the City of Milwaukie Planning Commission. The criteria are listed with a response and findings for each, below.

Findings

Findings of the review are based on analyzing and comparing the new materials that were resubmitted as part of the Historic Resource Land Use Review Application, the historic context and significance of the property, and the approval criteria. In PMA's professional opinion, at a minimum to secure approval for this design, the north-facing, primary elevation of the home should preserve all historic materials, design elements, and overall composition. The proposed east and west wings should be designed to harmonize with the existing historic structure, maintaining consistency in materials, design, and composition. This includes retaining the design and composition of the dormers and pediments on the west wing.

1. *Retention of Original Construction*

Distinguishing original qualities defining a resource's character shall not be destroyed. Removal or alteration of historic materials or distinctive architectural features should be avoided when possible.

The resubmitted project materials propose to redesign the front elevation of the building, which includes the primary entrance column to extend outward over six feet. This change would cause the removal of high preservation priority character-defining features and distinguishing original qualities that define the resource's character as described in the 1988 Cultural Resource Inventory documentation. These features include the stucco quoining and stucco cladding. Additionally, other character-defining features that are proposed to change in design include the pediments above the second story west wing windows and new window designs throughout the primary elevation. This criterion is therefore not met.

In order to meet this criterion, the character-defining qualities of the entire primary, north, elevation should remain as they currently exist. This includes the primary entrance block and existing window designs in order to retain their historic design elements and remain in place as they have historically. The primary entrance block should remain flush with the north elevation and window size and design should match that of the historic size and design. The windows and associated pediments on the west wing should match in composition and design to that of the historic. The resubmitted materials include the addition of a belt course on the west wing. This design element is not historically accurate to this wing of the home.

Per the approval criteria, the removal of high preservation priority character-defining features should be avoided when possible. Changes to character defining features as listed in the 1988 Cultural Resource Inventory documentation on primary, north elevations and elevations visible from the public right of way should be avoided. Removal or manipulation of these features will create a home that is near unrecognizable compared to the original and will therefore become an inaccurate representation of the historic building. On the primary, north elevations, replace as needed due to deterioration. Other historic materials or distinctive architectural features that are medium preservation priority features not on the north elevations or not visible from the public right of way and are not mentioned as part of the 1988 Cultural Resource Inventory documentation may be removed or altered, as long as the alterations reflect a simplified style or simplified Colonial Revival style in order to distinguish the new changes from the original.

2. *Building Height*

Existing building heights should be maintained. Alteration of roof pitches shall be avoided. Raising or lowering a building's permanent elevation when constructing a foundation shall be avoided, except as required by building code or floodplain development permit.

The first page of the plan set labeled "EKLUND SET 11.7.24" shows a hip roof proposed for the existing east wing. Other plan drawings show the flat roof will remain as it has historically for this wing. The proposal shows roof alterations on the main portion and west wing of the home. The roof height of the main core of the home and the west wing will be maintained. The plan set shows the addition of three pediments on the second floor of the west wing that will not maintain design to

that of the historic existing two pediments. The building's permanent elevation will remain as is and no new foundation under the existing home will be built. This criterion has not been fully addressed and is not yet met.

In order to meet this criterion, the following should be maintained:
- Ensure the retention of the flat roof on the existing east wing of the home;
- Ensure the retention of historic design and composition of the two existing pediments above windows on the west wing of the home;
- Retention of the flat roof above the two-story bay window on the north elevation;
- Retention of the pediment above the front entry design sequence;
- Ensure that the proposed addition and extension of walls at the garage, kitchen and kitchen nook, and east wing will not alter the pitch of the roof to which they are attached; and
- Ensure that no new roof height will be taller than the existing tallest roof height of the building.

3. Horizontal Additions

The scale and proportion of building additions, including the relationship of windows to walls, shall be visually compatible with the traditional architectural character of the historic building. Contemporary design for alterations and additions is acceptable if the design respects the building's original design and is compatible with the original scale, materials, and window and door-opening proportions of the building.

The proposed additions and extensions on the west, east, and south elevations are visually compatible with the traditional architectural character and scale of the historic building. No extensions or additions on the north elevations are permitted due to Approval Criteria 1 *Retention of Original Construction.* Although contemporary in design, the design of these additions and alterations, including the overall scale and design of windows and doors respects the building's original design and are compatible with the original scale and window and door-opening proportions of the building. In order to meet this criterion, ensure that the materials of the east addition be visually compatible and respect the original stucco cladding and the Colonial Revival style architecture; ensure the materials of the rear room extensions are visually compatible with that of the historic stucco cladding in order to be visually compatible with the traditional architectural character of the historic building. The design of the new east wing should be revised where the east addition connects with the existing structure. Specifically, the proposed north and south wings of the east addition should be shifted slightly to the east, ensuring that the roofline of this section does not intersect or obscure the historic portion of the building.

4. Windows

Window replacements shall match the visual qualities of original windows as closely as possible. Wood window frames are preferred in meeting this standard. However, if nonwood replacements exhibit similar visual qualities as their wooden counterparts, they may be acceptable. The original number of window panes shall be maintained or restored when replacements are required.

This application proposes to replace or redesign all windows on every elevation. Some of the new windows do not match the visual qualities of the original. Therefore, this criterion is not met.

In order to meet this criterion, window replacements will match the visual qualities and design of the historic windows on the north elevation. The new windows proposed on the first and second floor of the new west wing should match those of the existing historic. Other window replacements or redesigns should match the visual qualities of the original windows. Maintain the existing number of window panes.

5. Restoration Possible

Except where building code precludes it, new additions or alteration to buildings shall be done in such a manner that if such additions or alterations were to be removed in the future, the essential form and integrity of the original building could be restored.

As the new alterations are wood frame construction, in theory this criterion is met. The exterior carport, conservatory, lanais, patio, and porch should be built in such a manner that they can be removed in the future. The architect and build team should ensure that the extensions and additions on the east and south elevations and garage are built in such a way that they can be removed and the original form and integrity of the original building can be restored.

6. Signs and Lighting

Signs, lighting, and other appurtenances (such as walls, fences, awnings, and landscaping) shall be visually compatible with the original character of the building.

There is no proposed signage. No lighting was indicated on the exterior primary façade. No elevation or renderings of appurtenances were submitted. Based on no sign, lighting, and other appurtenances submitted, this criterion is met.

7. Time Period Consistency

Buildings shall be recognized as products of their own time. Alterations that have no Historical basis or which seek to create an earlier appearance shall be avoided.

The proposed alterations that are allowable based on other approval criteria are proposed to align with the visual qualities of the historic home and Colonial Revival style architecture. No proposed alterations create a false historical basis or create an earlier appearance. This criterion is met.

8. Visual Integrity/Style

Distinctive stylistic features, such as a line of columns, piers, spandrels, or other primary structural elements, or examples of skilled craftsmanship which characterize a building, shall be maintained or restored as far as is practicable.

The proposed changes to the north elevations and elevations visible to the public right of way do not meet Criterion 1 *Retention of Original Construction* and Criterion *4 Windows*. Therefore, this criterion is not met. In order to meet this criterion, distinctive stylistic features on the high preservation priority areas of the home, including the north elevations and elevations visible from the public right of way will be maintained or restored if showing signs of deterioration.

9. Replacement or Additional Materials

Whenever possible, deteriorated architectural features shall be repaired rather than replaced. In the event replacement of an existing feature is necessary, or an addition is proposed, new materials should match those of the original building, to the extent possible, in composition, design, color texture, and other visual qualities.

The resubmitted plans include updated materials that match those of the historic home. In order to meet this criterion, ensure all new materials in the proposed additions and extensions, including windows, doors, roofing, cladding, and other detail materials, match those of the original building in composition, design, color, texture, and other visual qualities.

10. Buffering

An appropriate buffer or screen, as provided under Subsection 19.504.6, may be required when a new commercial or industrial improvement or use is proposed on or adjacent to a designated resource, or within or adjacent to an historic district.

There is no new commercial or industrial improvement or use proposed on or adjacent to this home, therefore no buffer or screen is required. This criterion is not applicable.

Cultural Resource Survey Form:

CLACKAMAS COUNTY

I.D. NUMBER: M-26-W11

PHOTO INFORMATION:
ROLL: XVI
FRAME: 19

STUDY AREA: MILWAUKIE
LEGAL: T. 1S R. 1E SEC. 26 DB
TAX (LOTS): 300
ZONE _____ SIZE _____

IDENTIFICATION:

COMMON/HISTORICAL NAME: RAVENSWOOD William Mac. Master Residence
ADDRESS: 1620 S.E. Waverly Drive (Broadway) AREA: Milwaukie, 97222
CURRENT OWNER: ULDIS SEJA USE: Residence
OWNER'S ADDRESS: Same
ORIGINAL OWNER: WILLIAM MacMASTER USE: Residence
AREA OF SIGNIFICANCE: TOWN: X COUNTY: _____ CITY: _____ NATION: _____

HISTORIC INTEREST:

THEME: Architecture - 20th Century DATE: 1922-23
DESCRIPTION: Annie MacMaster was the head of all the women's war work (1916) throughout the Pacific Northwest for the YMCA during World War I. The house was built by Drake-Voss Construction Company. William MacMaster was in the business of real-estate investments.

ARCHITECTURAL INTEREST:

STYLE: ~~Classic Revival~~ Colonial Revival STORIES: 2
DATE: 1922-23 CONDITION: Good ARCHITECT: _____
SIDING: Stucco with stucco guoins
ROOF: Hip with gabled wall dormer
DOORS: Paneled
WINDOWS: Multi-light over 1. A palladian window on North elevation. Full-height polygonal bay window with tent roof and spandrel.
MAIN ENTRANCE: Ionic pilasters. Broken scroll pediment.

NOTES: Belt course above heads of second story windows.



BIBLIOGRAPHY:
#6, Page 87

DATE: 10/14/83
RECORDER: HAYDEN/ALTIER

CITY OF MILWAUKIE
CULTURAL RESOURCE INVENTORY
Statement of Significance

ADDRESS: 1620 S.E. Waverly Drive

The William MacMaster House, constructed in 1922, is the finest example of the Colonial Revival style in Milwaukie. It is distinguished by outstanding design features including the elegant entrance with its paired, paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters. The handsome stuccoed exterior is embellished with quoining, polygonal bays, and a massive endwall chimney. A Palladian window is located on the north elevation. Basically rectangular in plan the main volume of the house is flanked by two smaller wings on the side elevations. The house is located near the entrance to the Waverly neighborhood across the street to the south from the golf course.

Known as "Ravenswood" this was MacMasters second estate within Waverly; in 1908 he built "Ardgour", torn down in 1937, the Clarence E. Francis Home was built on the same location--the estate site is still referred to as Ardgour. Ardgour was one of the first "permanent" dwellings: many of the club members maintained their primary residences in Portland up until that point and looked on their Waverly estates as country cottages. On the completion of Ardgour, MacMaster moved his family to Waverly and maintained it as his permanent residence, many of the club members followed suit; looking on Waverly as their primary homes.

William MacMaster was born in Silverdale, England in 1858. Both parents were Scottish. MacMaster was educated in Scotland coming to Oregon in 1883 as financial representative of the Dundee Land Company. In 1890 he formed a real estate investment firm with A. H. Birrell, buying Birrell out in 1903. In 1922 he associated himself with his son-in-law, the firm known from then until his death as MacMaster & Ireland.

A respected and successful businessman, MacMaster was a tireless local and state booster. He was president of the Arlington Club, he was twice president of Waverly--considered the primary force behind the acquisition and formation of the club on its present site--and twice president of the Portland Chamber of Commerce.

BIBLIOGRAPHY: TICOR Title Company Records, Oregon, City.
Oregon Journal, 23 March 1937 p.3.
Dimon, Elizabeth. Twas Many Years Since.

RECORDER: Koler/Morrison Consultants DATE: 3/88

Site 12: 1620 Waverly Drive

Revised Narrative

Total Points: 54
Rating Category: Significant
Reason for Rating: Scores of 10 on PERSON and STYLE

1. PERSON/GROUP/ ORGANIZATION: Associated with the life or activities of a person, group, organization, or institution that has made a significant contribution to the community, state, or nation. (10 out of 10 points, Particularly Strong)

   Known as "Ravenswood" this was William MacMasters' second estate within Waverly; in 1908 he built "Ardgour", torn down in 1937, the Clarence E. Francis Home was built on the some location--the estate site is still referred to as Ardgour. Ardgour was one of the first "permanent" dwellings: many of the club members maintained their primary residences in Portland up until that point and looked on their Waverly estates as country cottages. On the completion of Ardgour, MacMaster moved his family to Waverly and maintained it as his permanent residence, many of the club members followed suit; looking on Waverly as their primary homes.

   William MacMaster was born in Silverdale, England in 1858. Both parents were Scottish. MacMaster was educated in Scotland coming to Oregon in 1883 as financial representative of the Dundee Land Company. In 1890 he formed a real estate investment firm with A.H. Birrell, buying Birrell out in 1903. In 1922 he associated himself with his son-in-law, the firm known from then until his death as MacMaster and Ireland.

   A respected and successful businessman, MacMaster was a tireless local and state booster. He was president of the Arlington Club, he was twice president of Waverly--considered the primary force behind the acquisition and formation of the club on its present site--and twice president of the Portland Chamber of Commerce.

   Annie MacMaster was the head of all the women's war work (1916) throughout the Pacific Northwest for the YMCA during World War I. The house was built by Drake-Voss Construction Company. William MacMaster was in the business of real-estate investments.

2. EVENT: Associated with an event that has made a significant contribution to the community, state, or nation. (0 out of 10 points, None)

3. PATTERN: Associated with, and illustrative of, broad patterns of cultural, social, political, economic, or industrial history in the community, state, or nation. (0 out of 10 points, None)

4. STYLE/BUILDING TYPE/CONVENTION: Significance as an example of a particular architectural style, building type, or convention. (10 out of 10 points, Excellent)

   The William MacMaster House, constructed in 1922, is the finest example of the Colonial Revival style in Milwaukie. It is distinguished by outstanding design features including the

elegant entrance with its paired, paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters.

Architecture - 20th Century

5. DESIGN/ARTISTIC QUALITY: Significance due to quality of composition, detailing, and craftsmanship. (4 out of 4 points, Excellent)

The handsome stuccoed exterior is embellished with quoining, polygonal bays, and a massive endwall chimney. A Palladian window is located on the north elevation. Basically rectangular in plan the main volume of the house is flanked by two similar wings on the side elevations.

There is a full-height polygonal bay window with tent roof and spandrel. The main entrance has Ionic pilasters and a broken scroll pediment. There is a belt course above heads of second story windows.

6. MATERIALS/CONSTRUCTION: Significance as an example of a particular material or method of construction. (0 out of 4 points, Of little interest)

The siding material is made of stucco. There are also quoins made of stucco. The door is paneled.

7. INTEGRITY: Significance because it retains its original design features, materials, and character. (7 out of 7 points, No apparent alterations)

8. RARITY: Significance as the only remaining, or one of the few remaining properties of a particular style, building type, design, material, or method of construction. (7 out of 10 points, One of a few)

9. LANDMARK: Significance as a visual landmark. (5 out of 10 points, Conspicuous)

The house is located near the entrance to the Waverly neighborhood across the street to the south from the golf course.

10. SETTING: Significance because current land-use surrounding the property contributes to the integrity of the pertinent historic period. (4 out of 4 points, Excellent)

11. CONTINUITY: Significant because the property contributes to the continuity or character of the street, neighborhood, or community. (7 out of 7 points, Establishes character)

MISCELLANEOUS NOTES

Detailed Statement

Proposed Alterations at 1620 SE Waverly Dr.

12/20/2024
Prepared For: City of Milwaukie, Oregon
Prepared By: Fowler Home + Design

The summary of proposed alterations to the existing residence on the main floor include the addition of a primary wing located on the far east side of the residence that houses a bedroom, bath, and walk-in closet, the addition of a 306 s.f. prefabricated conservatory at the southwest side of the residence, extending the west garage wall 6', and extending the south kitchen and nook walls 8.5' and 6' respectively. The total main floor additions including the conservatory amounts to 1,436 s.f.

On the upper floor, slight wall extensions are made on the east wall at the existing bath, the south wall, and west wall which amounts to a total of 348 s.f. additional area. The upper floor also includes the additions of a deck on the northwest and the south. All existing roofs are kept as existing as much as possible, such as the tallest roof form over the primary mass of the existing residence and the flat roof over the primary suite bath. The proposed roofs maintain the existing roof slopes and do not exceed the existing maximum height.

The two most critical elements outlined in the 1988 historic resource survey are the PERSON and STYLE categories. The STYE category states the residence as Colonial Revival style with elements of interest centered primarily around the entrance of the residence such as the paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters. Additional noted elements of interest include quoining at the entrance, an endwall chimney, a palladian window, the polygonal bay window with tent roof and spandrel, and the belt course over the second story windows.

The proposed alterations have little to no impact on the PERSON category as the overall character and layout of the existing residence is maintained. For the STYLE category, the key historic features are to remain and the proposed minor alterations add to the existing style such as the colonial wooden balusters.

The alterations will also create a more efficient and safe residence through better insulation, higher performance windows, and seismic fortification of the structure.

The proposed alterations adhere to all relevant zoning and development standards. Refer to the plans and elevations for further information.

Approval Criteria:

1. *Retention of Original Construction*

Distinguishing original qualities defining a resource's character shall not be destroyed. Removal or alteration of historic materials or distinctive architectural features should be avoided when possible.

Response: The majority of the existing walls and the primary and tallest portion of the roof will remain. The key design elements are to remain which includes the paneled doors, Swan's neck pediment, full entablature, Ionic pilasters, quoining at the entrance, an endwall chimney, a palladian window, the polygonal bay window with tent roof and spandrel, and the belt course over the second story windows. The criterion is met.

2. *Building Height*

Existing building heights should be maintained. Alteration of roof pitches shall be avoided. Raising or lowering a building's permanent elevation when constructing a foundation shall be avoided, except as required by building code or floodplain development permit.

Response: The tallest roof form will remain, thus maintaining the existing buildings highest elevation. All proposed roofs match the existing roof pitches. The flat roof of the existing east wing of the home, the pediments above windows on the west wing of the home, the flat roof above the two story bay window, and the pediment above the front entry will all be maintained. The criterion is met.

3. *Horizontal Additions*

The scale and proportion of building additions, including the relationship of windows to walls, shall be visually compatible with the traditional architectural character of the historic building. Contemporary design for alterations and additions is acceptable if the design respects the building's original design and is compatible with the original scale, materials, and window and door-opening proportions of the building.

Response: All proposed alterations, including the relationship of windows to walls, remain compatible with the original architectural character, scale, materials, and proportions of the historic residence. The criterion is met.

4. *Windows*

Window replacements shall match the visual qualities of original windows as closely as possible. Wood window frames are preferred in meeting this standard. However, if non wood replacements exhibit similar visual qualities as their wooden counterparts, they may be acceptable. The original number of window panes shall be maintained or restored when replacements are required.

Response: The window replacements will match the window types, configuration, frames, and grids of the original windows as closely as possible. The criterion is met.

5. *Restoration Possible*

Except where building code precludes it, new additions or alteration to buildings shall be done in such a manner that if such additions or alterations were to be removed in the future, the essential form and integrity of the original building could be restored.

Response: The proposed alterations and additions shall be constructed in such a manner that the additions and alterations could be removed and restored to its existing condition, thus preserving the essential form and integrity of the original building. The criterion is met.

6. *Signs and Lighting*

Signs, lighting, and other appurtenances (such as walls, fences, awnings, and landscaping) shall be visually compatible with the original character of the building.

Response: There is no proposed signage. The proposed lighting and other appurtenances will be visually compatible with the original character of the building. The criterion is met.

7. *Time Period Consistency*

Buildings shall be recognized as products of their own time. Alterations that have no Historical basis or which seek to create an earlier appearance shall be avoided.

Response: All proposed alterations and additions are deeply based in the Colonial Revival style. The criterion is met.

8. *Visual Integrity/Style*

Distinctive stylistic features, such as a line of columns, piers, spandrels, or other primary structural elements, or examples of skilled craftsmanship which characterize a building, shall be maintained or restored as far as is practicable.

Response: The distinctive stylistic features on the high preservation priority areas of the home are to be maintained. Any proposed features are of the Colonial Revival Style. The criterion is met.

9. *Replacement or Additional Materials*

Whenever possible, deteriorated architectural features shall be repaired rather than replaced. In the event replacement of an existing feature is necessary, or an addition is proposed, new materials should match those of the original building, to the extent possible, in composition, design, color texture, and other visual qualities.

Response: The proposed alterations and additions match the existing materials of the historic residence, such as stucco siding. The criterion is met.

10. *Buffering*

An appropriate buffer or screen, as provided under Subsection 19.504.6, may be required when a new commercial or industrial improvement or use is proposed on or adjacent to a designated resource, or within or adjacent to an historic district.

Response: Our current proposal does not include any buffering or screening. However, if required, the buffering or screening will be consistent with requirements from NPS. The criterion is not applicable.

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

- ALL EXCESS GRADING MATERIAL TO BE EXPORTED TO AN APPROVED DISPOSAL LOCATION.
- ALL FILL AREAS (ie. UNDER GARAGE FLOORS, SIDEWALKS, DRIVEWAYS, ETC.. TO BE COMPACTED GRANULAR FILL.
- THERE WILL BE A SLIGHT OVER EXCAVATION TO PROVIDE CONCRETE FORMING ALL AROUND NEW STRUCTURE.
- PROVIDE COUNTY/CITY APPROVED SEDIMENT FENCING AROUND EXCAVATED AREA PRIOR TO EXCAVATION AND CONSTRUCTION.
- PROVIDE COUNTY/CITY APPROVED STABILIZED GRAVELED CONSTRUCTION ENTRANCE PRIOR TO EXCAVATION AND CONSTRUCTION.
- STOCKPILES MUST BE COVERED WITH MULCH OR PLASTIC SHEETING BETWEEN OCTOBER 1 AND APRIL 30.
- CONTRACTOR/ SUB-CONTRACTOR TO VERIFY LOCATION OF ALL UTILITIES PRIOR TO EXCAVATION AND CONSTRUCTION.
- BOUNDARY AND TOPOGRAPHY INFORMATION HAS BEEN PROVIDED TO FOULER HOME DESIGN INC. FOULER HOME DESIGN, INC WILL NOT BE HELD LIABLE FOR THE ACCURACY OF THIS INFORMATION. IT IS THE SOLE RESPONSIBILITY OF THE CONTRACTOR /OWNER TO VERIFY ALL SITE CONDITIONS INCLUDING FILL PLACED ON SITE.

- ELEVATION LEGEND:
  - EE= EXISTING GRADE ELEVATION
  - FE= FINAL GRADE ELEVATION
  - FFE= FINISHED FLOOR ELEVATION
- PROVIDE A MINIMUM GRAVEL BASE UNDER ALL DRIVEWAY AREAS.
- PROVIDE A 4" MINIMUM GRAVEL BASE UNDER ALL SIDEWALK AND PATIO AREAS.
- PIPE ALL STORM DRAINAGE FROM THE BUILDING TO A COUNTY/CITY DISPOSAL POINT/CONNECTION.
- MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
- PROVIDE AND MAINTAIN FINISH GRADE WITH POSITIVE DRAINAGE AWAY FROM STRUCTURE ON ALL SIDES WITH A SLOPE OF 6" MINIMUM IN 10'-0".

EROSION CONTROL PLAN

- COVERED STOCKPILES - COVER W/- PLASTIC OCT. 1 - MAY 31.
- SEDIMENT FENCE
- CONSTRUCTION ENTRANCE (ACCESS POINT)
- WORK STAGING/ MATERIAL STORAGE
- N.B. 3" APPROVED COVER ON ALL AREAS OF BARE SOIL UNTIL PERMANENT LANDSCAPE IS IN PLACE
- NON-WOVEN INLET PROTECTION AT THE FIRST DOWNSTREAM CATCH BASIN
- WOODEN CURB RAMP
- DIRECTION OF STORM-WATER FLOW ON SITE

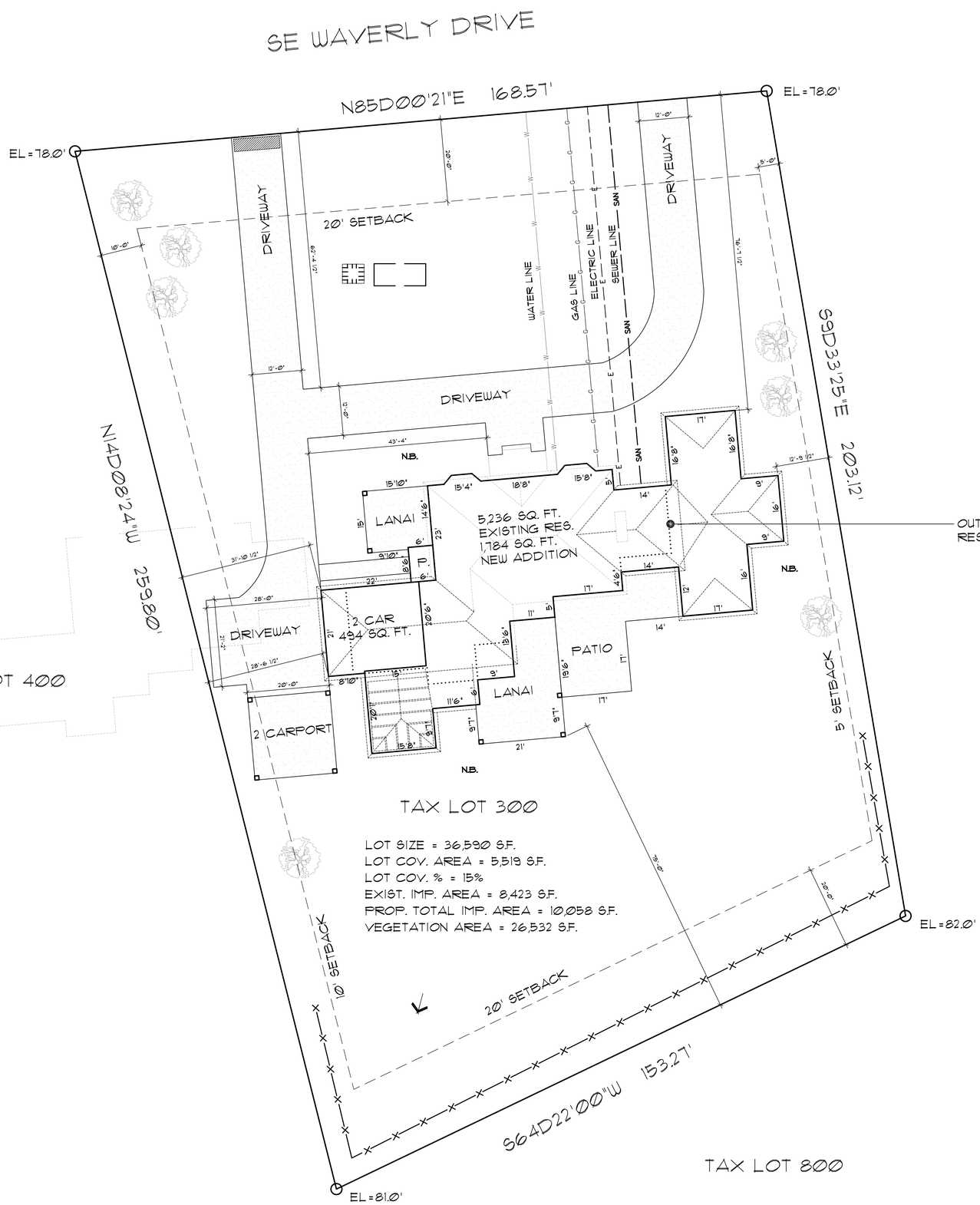
-NO STOCKPILES ARE TO BE LOCATED IN THE SIDE SETBACK AREAS.



IMPORTANT DISCLOSURE
- PLEASE READ:

THE PLANS YOU HAVE PURCHASED ARE FOR THE EXCLUSIVE USE OF THE OWNER. UNDER NO CIRCUMSTANCES IS IT LEGAL TO BUILD FROM THESE PLANS MORE THAN ONCE WITHOUT THE WRITTEN CONSENT FROM THE DESIGNER TROY FOULER. THESE PLANS ARE COPYRIGHTED AND IT IS A VIOLATION OF FEDERAL COPYRIGHT LAWS TO REPRODUCE THESE PLANS. FOULER HOME DESIGN LLC WILL FULLY PROSECUTE ANY PARTY THAT IS FOUND TO BE VIOLATING THIS LAW. FURTHERMORE IT IS UNDERSTOOD THAT IT IS COMPLETELY THE RESPONSIBILITY OF THE CONTRACTOR TO CONSTRUCT THE HOME DESCRIBED HEREIN, ON ANY PARTICULAR SITE AND WITHIN THE CONFINES OF THE GOVERNING JURISDICTION. FOULER HOME DESIGN LLC. TAKES NO RESPONSIBILITY FOR THE CONFORMANCE OF THIS PLAN TO ANY CODE OR ANY BUILDING SITE.

CONTRACTOR TO VERIFY EXISTING CONDITIONS AND UTILITIES, TYP.



FOWLER HOME + DESIGN

THE EKLUND RESIDENCE
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 12/20/2024
SCALE: 1"=10'-0"
FILE:

PLOT PLAN

0.

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ELEVATION NOTES:

1. ROOFING MATERIAL TO BE ARCHITECTURAL COMPOSITION MATERIALS AND 5" STANDING SEAM METAL ROOFING SEE ELEVATION PAGE. ROOF SHINGLES TO BE NAILED PER MANUFACTURED INSTRUCTIONS FOR 80 MPH MINIMUM WIND AREAS.
2. ROOF PITCH TO BE SHOWN ON PLANS
3. ALL EAVES TO BE NOTED ON PLANS WITH A 5" GALVANIZED FACIA GUTTER ON SPECIFIED FACIA BD. PROVIDE 3" GALVANIZED DOWNSPOUTS (DS) AS SHOWN ON ROOF FRAMING PLAN.
4. SIDING NOTED ON PLANS.
5. ALL WINDOW & DOOR TRIM TO BE 5/4 X 4 AT SIDES AND 5/4 X 6 CROWN & SILL.
6. SIDING TO BE SPECIFIED ON PLAN. CAULK ALL CORNER BOARDS, JOINTS, WINDOWS, DOORS AND SURROUNDS.
7. ALL CORNER BOARD TRIM TO BE 2 X 4 PRIMED BD. AS SHOWN ON PLAN.
8. COVERED PORCHES AND EAVE SOFFITS TO BE 1/2" EXT. PLYWOOD OR EQUAL TOO. CAULK ALL JOINTS.
9. MASONARY VENEER TO BE CULTURED STONE OR EQUAL AS SHOWN ON PLAN. PROVIDE GALVANIZED FLASHING ON A MASONARY SILL CAP OVER VENEER. VERIFY LOCATION AND TYPE OF MASONARY WITH BUILDER PRIOR TO CONSTRUCTION.
10. PROVIDE 2 X 10 ROUGH SAWN CEDAR OR EQUAL AT ALL BELLY BANDS WITH A GALVANIZED "Z" FLASHING AT EXPOSED TOP. LOCATIONS ARE SHOWN ON PLAN UNLESS OTHERWISE NOTED.
11. PROVIDE VENTS AS SHOWN, SHUTTERS AND TRIMS ON ELEVATIONS AS SHOWN ON PLAN.
12. PROVIDE VINYL WINDOWS AS SHOWN ON PLAN.
13. EXPOSED CONCRETE WALKS TO BE BROOMED FINISH AS SHOWN ON PLAN.
14. MAXIMUM FOUNDATION EXPOSURE TO BE 18" FROM FINISHED GRADE.
15. MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
16. FINISH GRADE TO BE 1:1 MAXIMUM SLOPE WITH A 6" MINIMUM IN 10'-0" MINIMUM SLOPE AWAY FROM STRUCTURE ALL AROUND.
17. SEE ELEVATIONS FOR ANY ADDITIONAL NOTATIONS THAT MAY BE OF IMPORTANCE.
18. ALL WORK IS TO COMPLY WITH THE LATEST ADOPTED VERSIONS OF THE INTERNATIONAL ONE & TWO FAMILY DWELLING CODE, UNIFORM BUILDING CODE OF ANY APPLICABLE STATE, COUNTY OR LOCAL JURISDICTION.
19. PRIOR TO BEGINING CONSTRUCTION, THE PLANS AND SPECIFICATIONS SHALL BE APPROVED BY THE LOCAL BUILDING AUTHORITY.
20. THE CONTRACTOR IS RESPONSIBLE TO CHECK THE PLANS AND IS TO NOTIFY THE DESIGNER OF ANY ERRORS OR OMISSIONS PRIOR TO THE START AND/OR DURING CONSTRUCTION. THE DESIGNER IS NOT RESPONSIBLE FOR CONSTRUCTION MEANS AND METHODS, ACTS OR OMISSIONS OF THE CONTRACTOR AND/OR SUBCONTRACTOR.
21. BUILDING THIS PLAN ON SITE CONDITIONS DIFFERENT FROM THOSE SHOWN ON THE PLANS MAY REQUIRE MODIFIED FOUNDATION AND FRAMING DETAILS. THE CONTRACTOR IS RESPONSIBLE TO REVIEW SPECIFIC SITE CONDITIONS WITH THE DESIGNER BEFORE CONSTRUCTION.
22. VERIFY FOUNDATION AND FRAMING DETAILS (WHERE APPLICABLE) WITH MECH, PLUMBING, ELECTRICAL AND OR OTHER SUBCONTRACTORS TO ASSURE PROPER CONSTRUCTION INSTALLATION.
23. PLUMBING, ELECTRICAL AND MECHANICAL DIAGRAMS, LAYOUTS AND/OR DESIGN TO BE
24. SUPPLIED BY CONTRACTOR AND/OR SUB-CONTRACTOR.
25. ENGINEERED PRODUCTS (ROOF TRUSSES, FLOOR JOISTS) TO HAVE DESIGN, ENGINEERING SPECIFICATIONS AND LAYOUT SUPPLIED FROM MANUFACTURER.
26. WRITTEN DIMENSIONS SHALL HAVE PRECEDENCE OVER SCALED DIMENSIONS. DO NOT SCALE THE DRAWINGS. THE CONTRACTOR SHALL VERIFY AND IS RESPONSIBLE FOR ALL DIMENSIONS (INCLUDING ROUGH OPENINGS) AND CONDITIONS ON THE JOB.
27. SPECIFIC MANUFACTURERS AND MATERIALS DEPICTED ON THESE PLANS ARE AN INDICATION OF QUALITY AND STRENGTH. VERIFY ALL CONSTRUCTION MATERIAL SUBSTITUTIONS WITH CURRENT APPLICABLE BUILDING CODES AND LOCAL BUILDING OFFICIALS PRIOR TO INSTALLATION/SUBSTITUTION.
28. CONTRACTOR SHALL BE RESPONSIBLE FOR ANY VARIATIONS OR DEVIATIONS FROM THE ORIGINAL PLANS WITHOUT WRITTEN CONFIRMATION FROM THE DESIGNER.
29. ALL DIMENSIONS AND SQUARE FOOTAGE MAY VARY.
30. THE TYPE OF EXTERIOR FINISH, THE INSTALLATION, AND THE WATERPROOFING DETAILS ARE TO BE THE FULL RESPONSIBILITY OF THE OWNER/BUILDER. THIS DESIGNER ASSUMES NO RESPONSIBILITY OF THE BUILDING ENVELOPE

DESIGN LOADS:

WIND	110 MPH OR LESS
SEISMIC DESIGN CATEGORY	D2
FROST DEPTH	18 INCHES
ROOF DEAD LOAD	17 PSF
ROOF LIVE LOAD	20 PSF
SNOW LOAD	25 PSF
FLOOR DEAD LOAD	15 PSF
FLOOR LIVE LOAD	40 PSF
ATTIC STORAGE LOAD	40 PSF
STAIRS	60 PSF
DECKS	60 PSF

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FRONT ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL

WINDOW SCHEDULE

MARK	SIZE & TYPE	QUANTITY
1	NOT USED	-
2	NOT USED	-
3	NOT USED	-
4	2/8X4/0 D.H.	5
5	NOT USED	-
6	NOT USED	-
7	NOT USED	-
8	2/8X6/0 D.H.	12
9	NOT USED	-
10	2/0X3/0 D.H.	7
11	NOT USED	-
12	2/6X3/0 D.H.	22
13	2/6X3/4 D.H.	3
14	2/6X3/8 D.H.	5
15	NOT USED	-
16	4/0X3/0 D.H.	3
17	NOT USED	-

NOTES:
- ALL WINDOWS TO HAVE GRIDS U.N.O.
- CONTRACTOR TO CONFIRM ALL WINDOW SIZES AND QUANTITIES



EXIST. FRONT ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



EXIST. RIGHT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



RIGHT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 12/20/2024
SCALE: 1/4"=1'-0"
FILE:

EXTERIOR ELEVATION

1.

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CONTRACTOR TO SELECT 1 OPTION

(ORSC 2021 TABLE N1101.1)

1	HIGH EFFICIENCY HVAC SYSTEM: GAS-FIRED FURNACE OR BOILER WITH MINIMUM AFUE OF 94% OR AIR-SOURCE HEAT PUMP HSPF OF 10.0 TO 14.0 SEER COOLING, OR GROUND SOURCE HEAT PUMP COP OF 3.5, OR ENERGY STAR RATED
2	HIGH EFFICIENCY WATER HEATING SYSTEM: NATURAL GAS/PROPANE WATER HEATER WITH MIN. UEF OF 0.760, OR ELECTRIC HEAT PUMP WATER HEATER W/ MIN. 2.0 COP, OR NATURAL GAS/PROPANE TANKLESS/ INSTANTANEOUS HEATER W/ MIN. 0.960 UEF, AND DRAIN WATER HEAT RECOVERY UNIT INSTALLED ON MIN. OF ONE SHOWER/TUB/SHOWER
3	WALL INSULATION UPGRADE EXTERIOR WALLS U-0.045/R-21 CONVENTIONAL FRAMING WITH R-3.0 CONTINUOUS INSULATION
4	ADVANCED ENVELOPE WINDOWS U-0.25 (AREA WEIGHTED AVERAGE) AND, FLAT CEILINGS U-0.021/R-60, AND RAISED FLOORS U-0.032/R-30 OR SLAB EDGE INSULATION TO F-0.48 OR LESS (R-10 FOR 48", R-5 FOR 36" OR R-5 FULLY INSULATED SLAB)
5	DUCTLESS HEAT PUMP: FOR DWELLING UNITS WITH ALL-ELECTRIC HEAT PROVIDE: DUCTLESS HEAT PUMP OF MIN. HSPF 10 IN PRIMARY ZONE REPLACES ZONAL ELECTRIC HEAT SOURCES, AND PROGRAMMABLE THERMOSTAT FOR ALL HEATERS IN BEDROOMS
6	HIGH EFFICIENCY THERMAL ENVELOPE UA: PROPOSED UA IS 8% LOWER THAN THE CODE UA
7	GLAZING AREA GLAZING AREA MEASURED AS THE TOTAL OF FRAMED OPENINGS IS LESS THAN 12% OF CONDITIONED FLOOR AREA
8	3 ACH AIR LEAKAGE CONTROL + EFFICIENT VENTILATION ACHIEVE A MAX. OF 3.0 ACH@50 WHOLE-HOUSE AIR LEAKAGE WHEN THIRD-PARTY TESTED AND PROVIDE A WHOLE-HOUSE VENTILATION SYSTEM INCLUDING HEAT RECOVERY WITH A MINIMUM SENSIBLE HEAT RECOVERY EFFICIENCY OF NOT LESS THAN 66%

IMPORTANT DISCLOSURE PLEASE READ:

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WINDOW SCHEDULE

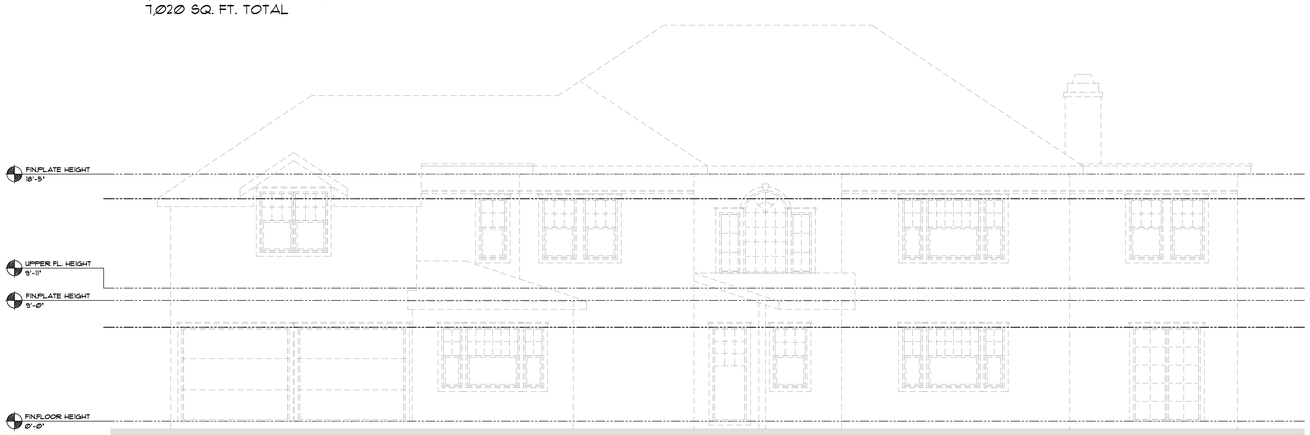
MARK	SIZE & TYPE	QUANTITY
1	NOT USED	-
2	NOT USED	-
3	NOT USED	-
4	2/6X4/0 D.H.	5
5	NOT USED	-
6	NOT USED	-
7	NOT USED	-
8	2/6X6/0 D.H.	12
9	NOT USED	-
10	2/6X5/0 D.H.	7
11	NOT USED	-
12	2/6X3/0 D.H.	22
13	2/6X3/4 D.H.	3
14	2/6X3/8 D.H.	5
15	NOT USED	-
16	4/6X5/0 D.H.	3
17	NOT USED	-

NOTES:
- ALL WINDOWS TO HAVE GRIDS U.N.O.
- CONTRACTOR TO CONFIRM ALL WINDOW SIZES AND QUANTITIES



REAR ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL



EXIST. REAR ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



EXIST. LEFT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



LEFT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

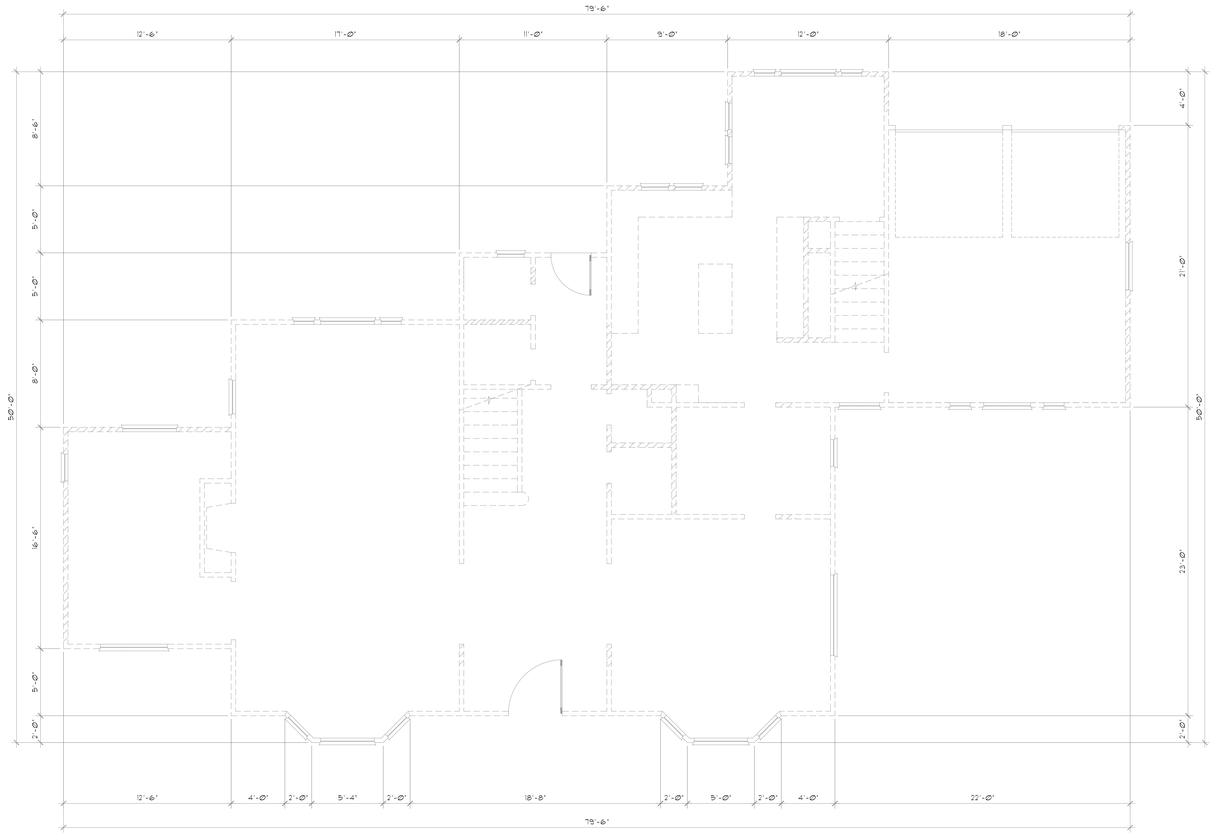
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 12/20/2024
SCALE: 1/4"=1'-0"
FILE:

EXTERIOR ELEVATION

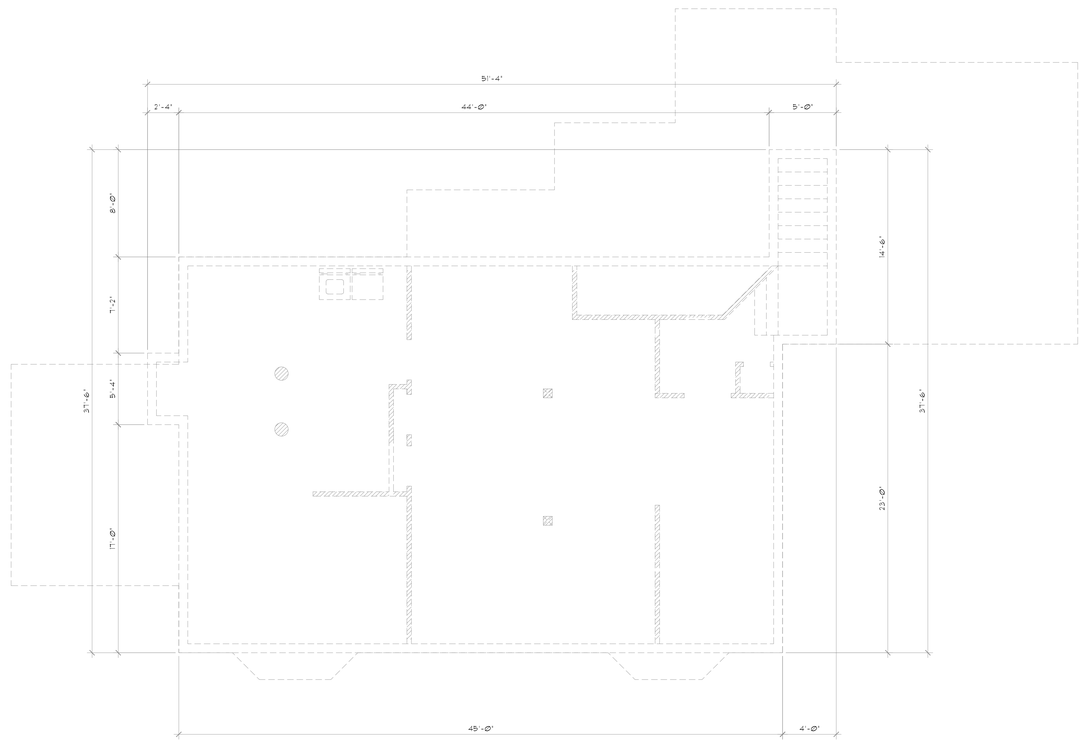
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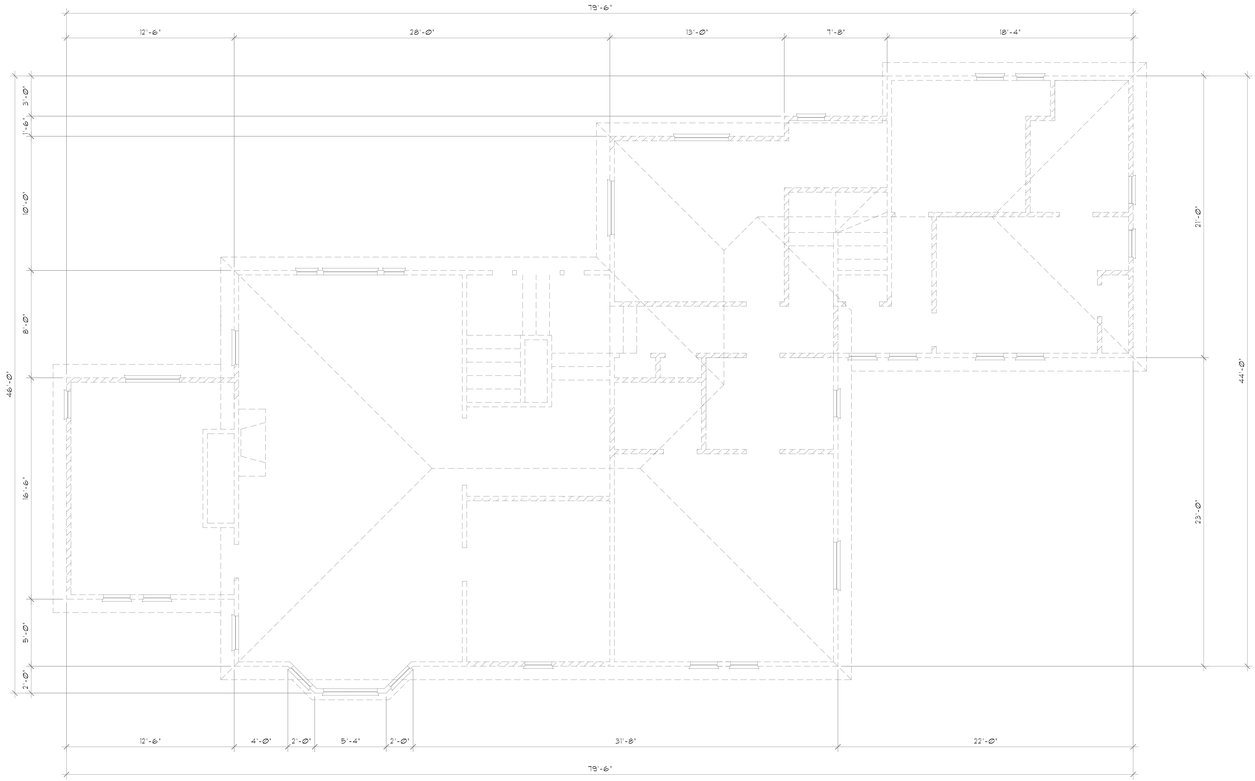
EXIST. MAIN FLOOR PLAN

1,956 SQ. FT. EXISTING 1/4"=1'-0"



EXIST. LOWER FLOOR PLAN

1,226 SQ. FT. EXISTING 1/4"=1'-0"



EXIST. UPPER FLOOR PLAN

2,054 SQ. FT. EXISTING 1/4"=1'-0"

IMPORTANT DISCLOSURE
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WALL LEGEND

- NEW (N) 2x WALL
- EXISTING (E) WALL TO BE REMOVED
- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

ALL DIMENSIONS TO OR FROM (E) STRUCTURE ARE FOR REFERENCE ONLY. CONTRACTOR TO FIELD VERIFY ALL DIMENSIONS AND IS RESPONSIBLE TO CONTACT DESIGNER W/ANY DISCREPENCIES.

FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 4/20/2024
SCALE: 1/4"=1'-0"
FILE:

EXISTING FLOOR PLANS

3

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FLOOR PLAN FRAMING NOTES:

1. ALL EXTERIOR WINDOW AND DOOR HEADERS TO BE 4 X 10 DF-L NO. 2 UNLESS OTHERWISE NOTED. (U.O.N.)
2. ALL EXTERIOR WALLS TO BE 2 X 6 STUDS @ 16" O.C. AND INTERIOR WALLS TO BE 2 X 4 STUDS @ 16" O.C. FOUNDATION PONY WALLS SHALL BE FRAMED OF 2 X 6 STUDS.
3. STANDARD STUD HEIGHT FOR UPPER FLOOR TO BE 9'-0" CEILING HEIGHT.
4. STANDARD STUD HEIGHT FOR MAIN FLOOR TO BE 9'-0" CEILING HEIGHT.
5. WINDOW AND DOOR HEADER HEIGHTS TO BE 8'-0" @ UPPER FLOOR AND 8'-0" @ LOWER FLOOR U.O.N. DOOR OPENINGS AND OTHER OPENING TO BE ALLIGNED WITH WINDOW HEIGHTS U.O.N.
6. ALL WOOD IN DIRECT CONTACT WITH CONCRETE TO BE PRESSURE TREATED AND/OR PROTECTED BY 55# FELT MOISTURE BARRIER.
7. PROVIDE POLYISOCYANURATE FOAM TYPE INSULATION AT FLOOR AND PLATE LINES, OPENINGS IN PLATES, CORNER STUD CAVITIES AND AROUND DOOR AND WINDOW ROUGH OPENINGS.
8. BEARING FOR JOISTS, SUPPORT MEMBERS, HEADERS, AND BEAMS TO BE 1½ THE MEMBERS WIDTH AND SOLID BEARING TO FOOTINGS. 2 X JOISTS TO HAVE 1-1/2 MIN. BEARING, U. O.N.
9. PROVIDE FIRE BLOCKING, DRAFT STOPS AND FIRE STOPS AS PER 2021 O.R.S.C. SECTION 602.8.
10. BLOCK ALL STUD WALLS AT SHEATHING SPLICES OR AS REQUIRED.
11. INTERIOR PASSAGE DOORS TO HAVE A MINIMUM OF (2) 2 X TRIMMERS EACH SIDE OF DOOR AND TO BE CENTERED IN WALLS.
12. ALL HOLDOWNS, JOIST HANGERS, BEAM HANGERS AND OTHER CONNECTORS TO BE "SIMPSON" OR EQUAL.
13. ALL STUD WALLS SHALL HAVE DOUBLE TOP PLATES OF THE SAME DIMENSION AS THE WALL FRAMING. PLATES SHALL OVERLAP A MINIMUM OF 48" BETWEEN SPLICES WITH AT LEAST (8) 16D NAILS THROUGH BOTH PLATES OF SPLICE.
14. DO NOT NOTCH OR DRILL THROUGH ANY SUPPORT COLUMNS, GIRDERS, BEAMS, JOIST SUPPORTING BEARING WALLS OR ANY OTHER CONCENTRATED LOAD BEARING MEMBER UNLESS SPECIFICALLY NOTED ON PLANS. CONTACT DESIGNER IN ANY SUCH SITUATIONS ARISE.
15. THIS STRUCTURE TO BE ADEQUIATELY BRACED FOR WIND AND GRAVITY LOADS UNTIL THE ROOF, FLOOR AND WALLS HAVE BEEN PERMANETLY FRAMED TOGETHER AND SHEATHED.

LUMBER SPECIES AND GRADING:

A. POSTS, BEAMS, HEADERS.	DF-L NO.2
B. FLOOR JOISTS, CEILING JOISTS, RAFTERS.	DF-L NO. 2
C. SILLS, PLATES, BLOCKING, BRIDGING.	DF-L NO. 3
D. STUDS.	DF-L STUD GRADE
E. STUDS OVER 10' HIGH.	DF-L NO. 2
F. FLOOR DECKING.	DF-L UTILITY GRADE
G. WALL, ROOF SHEATHING.	CDX EXT. APA RATED PLY OR OSB 2-M-W
H. GLU-LAM BEAMS	FB-2400 DRY, ADH. INTERIOR (EXT. ADH. AT EXT. COND.)
I. PATALLEL STRAND LUMBER (PSL) MATERIALS	FB-2900 E=2.0 FV=290 UNLESS OTHERWISE NOTED.
J. LAMINATED VENEER LUMBER (LVL) MATERIALS	FB-2600 E=1.8 FV=285 UNLESS OTHERWISE NOTED.

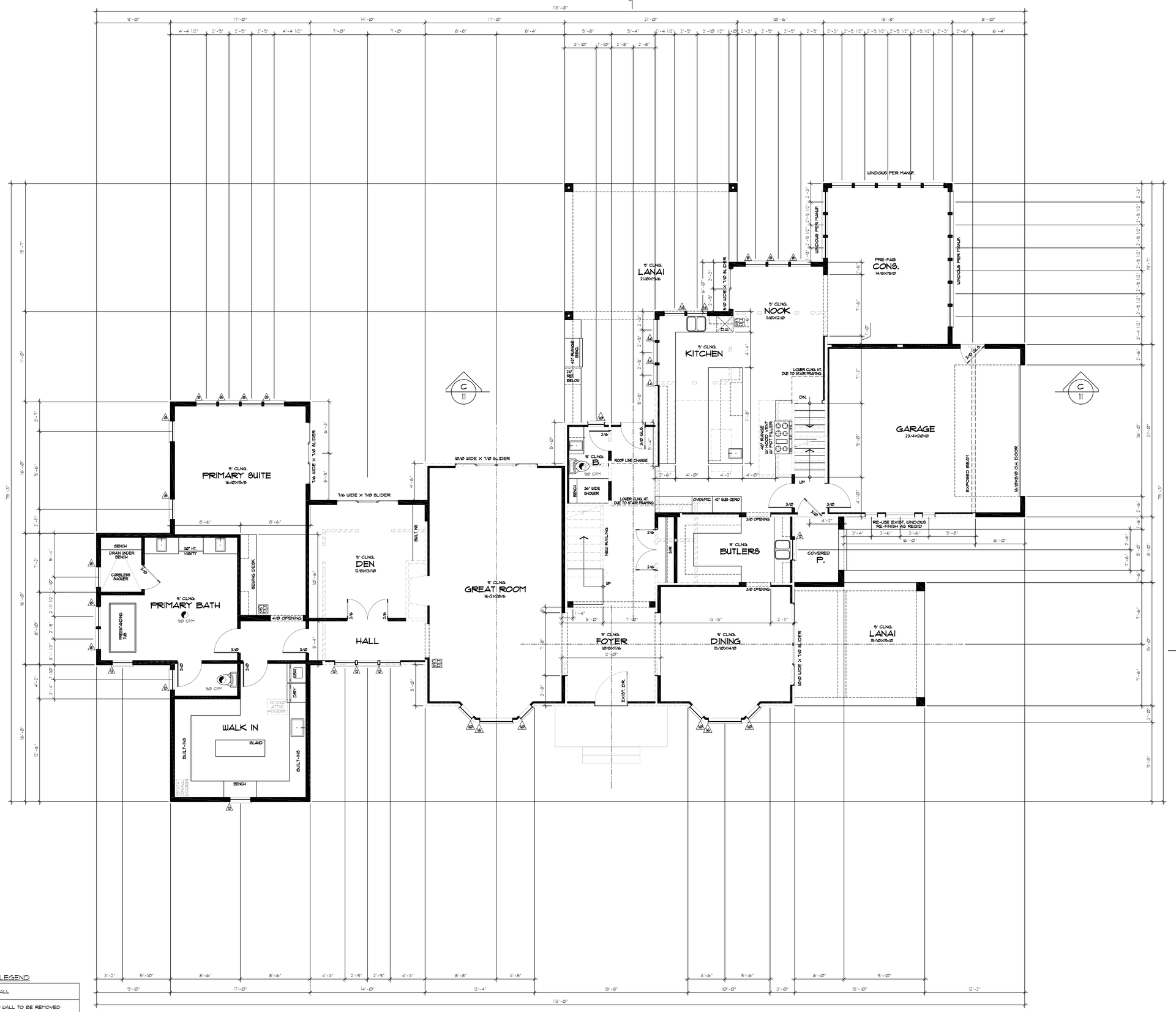
NAILING SCHEDULE:

REFER TO: O.R.S.C. 2021 TABLE R602.3(1)

WINDOW SCHEDULE

MARK	SIZE & TYPE	QUANTITY
1	NOT USED	-
2	NOT USED	-
3	NOT USED	-
4	2/6X4/0 D.H.	5
5	NOT USED	-
6	NOT USED	-
7	NOT USED	-
8	2/6X6/0 D.H.	12
9	NOT USED	-
10	2/0X5/0 D.H.	7
11	NOT USED	-
12	2/6X5/0 D.H.	22
13	2/6X3/4 D.H.	3
14	2/6X3/8 D.H.	5
15	NOT USED	-
16	4/0X5/0 D.H.	3
17	NOT USED	-

NOTES:
- ALL WINDOWS TO HAVE GRIDS U.N.O.
- CONTRACTOR TO CONFIRM ALL WINDOW SIZES AND QUANTITIES



MAIN FLOOR PLAN

1/4"=1'-0"

1,956 SQ. FT. EXISTING
3,086 SQ. FT. LOWER TOTAL
306 SQ. FT. CONSERVATORY
1,130 SQ. FT. NEW ADDITION

WALL LEGEND

	- NEW (N) 2x WALL
	- EXISTING (E) WALL TO BE REMOVED
	- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

ALL DIMENSIONS TO OR FROM (E) STRUCTURE ARE FOR REFERENCE ONLY. CONTRACTOR TO FIELD VERIFY ALL DIMENSIONS AND IS RESPONSIBLE TO CONTACT DESIGNER W/ANY DISCREPENCIES.

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FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 12/20/2024
SCALE: 1/4"=1'-0"
FILE:

MAIN FLOOR

4

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FLOOR PLAN FRAMING NOTES CONT.:

INSULATION:

1. USE PATH 1 OF 2021 ORSC ENERGY CODE AND THE FOLLOWING.
INSULATION VALUES TABLE N1101(1)

ENERGY COMPLIANCE	PATH 1
WALL INSULATION	R-21/R-23
WALL INSULATION BELOW GRADE	R-15/R-21
FLAT CEILINGS	R-49
VAULTED CEILINGS	R-30
UNDERFLOORS	R-30
SLAB EDGE PERIMETER	R-15
HEATED SLAB INTERIOR	R-10
WINDOWS	U-0.27
WINDOW AREA LIMITATION	N/A
SKYLIGHTS	U-0.50
EXTERIOR DOORS	U-0.20
EXTERIOR DOORS W/ >2.5 FT. GLAZING	U-0.40
FORCED AIR DUCT	R - 8

2. INSULATION:

R-49	ROOF (FLAT CEILING)
R-30	ROOF (VAULT CEILING)
R-30	FLOORS OVER UNHEATED SPACES
R-23	EXTERIOR WALLS
R-13/21	BASEMENT WALLS (INTERIOR OR EXTERIOR)
R-15 (RIGID)	CONCRETE FLOOR SLAB EDGES AT PERIMETER UNDER HEATED AREAS.
R-8	EXPOSED FURNACE DUCTS IN UNHEATED AREAS

3. GLAZING/DOORS:

NO LIMITS	WINDOW AREA LIMIT
U=.35	WINDOW CLASS
U=.54	ENTRY DOOR CLASS (24 SQ. FT. MAX.)
U=.40	FULL LIGHT GLASS DOOR CLASS
U=.20	OTHER DOORS (50% MAX. GLAZING.)
U=.60	SKYLIGHT CLASS (2% MAX. OF HEATED SPACE)

4. ALL AIR INFILTRATIONS IN THE EXTERIOR ENVELOPE SHALL BE SEALED INCLUDING WINDOW AND DOOR FRAMES, WALLS, FOUNDATIONS, VENTING AND UTILITY PENETRATIONS. ACCESS DOORS TO CRAWL SPACE AND ATTIC AREAS TO HAVE THE SAME EQUIVALENT RATING OF THE WALL. FLOOR OR CEILING THOUGH WHICH THEY PENETRATE.

5. PROVIDE AN APPROVED INSULATION VAPOR BARRIER WITH A ONE PERM DRY CUP RATING OR LESS AND TO BE INSTALLED ON THE WARM SIDE OF THE INSULATION.

6. INSULATE ALL ACCESS DOOR/HATCHES TO CRAWL SPACES AND ATTICS TO THE EQUIVALENT RATING OF THE WALL, FLOOR OR CEILING THROUGH WHICH THEY PENETRATE.

7. ALL EXPOSED INSULATION IS TO HAVE A FLAME SPREAD RATING NOT TO EXCEED 25, A SMOKE-DEVELOPED FACTOR NOT TO EXCEED 450 AND CRITICAL RADIANT FLUX NOT LESS THAN 0.12 WATTS PER SQUARE CENTIMETER.

MISCELLANEOUS:

1. EACH BEDROOM TO HAVE A MINIMUM WINDOW OPENING OF 5.7 SQ. FT. WITH A MINIMUM CLEARANCE WIDTH OF 20 INCHES AND A BOTTOM SILL HEIGHT LESS THEN 44 IN. ABOVE FINISHED FLOOR.

2. ALL EXTERIOR WINDOWS ARE TO BE DOUBLE GLAZED AND ALL EXTERIOR DOORS ARE TO BE SOLID CORE WITH WEATHER STRIPPING. PROVIDE 1/2" DEAD BOLT LOCKS ON ALL EXTERIOR DOORS. PROVIDE PEEP HOLES @ 54"-64" ABOVE FINISHED EXT. DOOR FLOOR.

3. WINDOW MUST MEET THE U-VALUE OR 'CLASS' REQUIREMENT FOR THE APROPRIATE ENERGY PATH AND BE LABELED ACCORDINGLY. SITE BUILT WINDOWS MAY BE USED PROVIDED THEY MEET THE CRITERIA AS OUTLINED IN 2021 ORSC. SEC N1111.4

4. WINDOWS ARE TO BE TEMPERED IF THEY ARE WITHIN 18 INCHES OF THE FLOOR, WITHIN A 24 INCH ARCH OF ANY DOOR IN A CLOSED POSITION, GLAZING USED IN RAILINGS, GLAZING IN FIXED OR SLIDING DOORS, WHERE THE BOTTOM EDGE IS WITHIN 60" INCHES ABOVE STAIRS, HOT TUBS, BATHTUBS, WHIRLPOOLS, AND/OR SHOWERS.

5. SKYLIGHTS ARE TO BE GLAZED WITH TEMPERED GLASS ON OUTSIDE AND LAMINATED GLASS ON INSIDE UNLESS PLEXIGLASS. GLASS TO HAVE A MAXIMUM CLEAR SPAN OF 25 INCHES. SKYLITE FRAME IS TO BE ATTACHED TO A 2 X CURB AND TO BE 4 INCHES MINIMUM ABOVE ROOF PLANE. MIN 25LBS. PSF SNOW LOAD ADDITIONAL

6. ALL TUB AND SHOWER ENCLOSURE DOORS TO BE GLAZED WITH SAFETY GLASS.

7. BATHROOMS AND UTILITY ROOMS ARE TO BE VENTED DIRECTLY TO THE OUTSIDE VIA METAL DUCTING WITH A FAN CAPABLE OR PRODUCING A MINIMUM OF 5 AIR EXCHANGES PER HOUR (50 CFM MIN.) DRYER AND RANGE HOODS ARE ALSO TO BE VENTED TO THE OUTSIDE. VENTS TO BE PROVIDED WITH BACK-DRAFT DAMPERS.

8. SMOKE DETECTORS SHALL BE INSTALLED IN EACH BEDROOM AND OUTSIDE THE IMMEDIATE VICINITY OF EACH BEDROOM AREA AND ON EACH STORY OF THE DUELLING. ALL DETECTORS SHALL BE INTERCONNECTED TO MAIN POWER SOURCE AS THE PRIMARY POWER AND BATTERY BACKUP AS SECONDARY POWER. ACTUATION OF ONE ALARM WILL ACTIVATE ALL THE ALARMS AND WILL BE AUDIBLE IN ALL BEDROOMS.

9. ELECTRICAL RECEPTACLES IN BATHROOMS, KITCHENS, EXTERIOR LOCATIONS AND GARAGES SHALL BE G.F.I.C. PER NATIONAL ELECTRICAL CODE REQUIREMENTS.

10. RECESSED LIGHT FIXTURES ARE NOT PERMITTED IN ANY INSULATED CAVITY UNLESS THE FIXTURES ARE LABELED AS BEING SUITABLE (I.C. LABEL) FOR DIRECT CONTACT WITH INSULATION.

11. ALL DOORS BETWEEN GARAGE AND LIVING AREAS SHALL BE ONE-HOUR FIRE RATED ASSEMBLIES WITH 1-3/4" SOLID CORE DOOR OR CODE APPROVED EQUAL WITH A SELF-CLOSING MECHANISM.

12. USE 1/2" GYPSUM BOARD IN HOUSE WALLS AND CEILINGS AND UNDER STAIRS. USE 5/8" TYPE X GYPSUM BD. ON WALLS AND CEILINGS BETWEEN GARAGE AND LIVING AREAS. PROVIDE 1/2" WATERPROOF GYPSUM BD. ABOVE ALL SHOWER AND TUB/SHOWER AND TUB/SHOWER UNITS AND IN ANY WATER SPLASH AREAS.

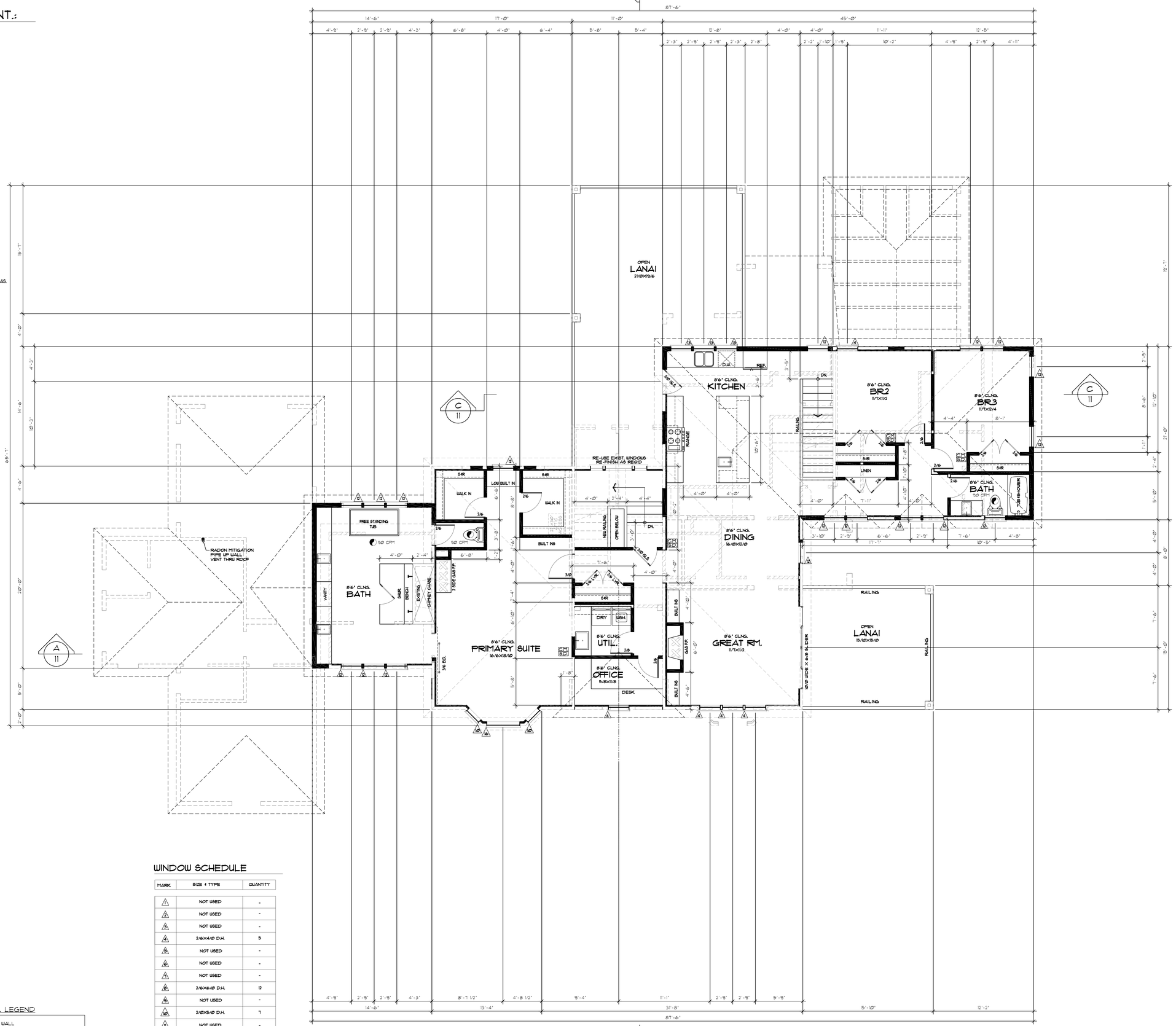
13. ALL FIREPLACE OPENINGS SHALL HAVE TEMPERED GLASS DOORS. PROVIDE OUTSIDE COMBUSTION AIR VENTS (WITH SCREENS AND BACK DAMPER) FOR FIREPLACES, WOOD STOVES AND ANY APPLIANCES WITH OPEN FLAME.

14. APPLIANCES PRODUCING A SPARK, GLOW OR FLAME CAPABLE OF IGNITING FLAMMABLE VAPORS SHALL NOT BE INSTALLED IN A GARAGE UNLESS THE PILOTS, BURNERS, HEATING ELEMENTS OR SWITCHES ARE AT LEAST 18 INCHES ABOVE THE FLOOR.

15. PROVIDE 80% MIN. EFFICIENT NATURAL GAS FURNACE WITH BACKDRAFT DAMPER AND NATURAL GAS HOT WATER HEATER WITH BACKDRAFT DAMPER. PROVIDE R-4 INSULATION AROUND HOT WATER LINES IN UNHEATED AREAS. ELEVATE FLAME IN UNITS 18" ABOVE FINISH FLOOR.

16. ALL WINDOW HDRS TO BE 4 X 10, U.N.O.

17. FRONT PORCH TO BE CONCRETE SLAB, U.N.O.



WINDOW SCHEDULE

MARK	SIZE & TYPE	QUANTITY
1	NOT USED	-
2	NOT USED	-
3	NOT USED	-
4	2'-6"X4'-0" D.H.	5
5	NOT USED	-
6	NOT USED	-
7	NOT USED	-
8	2'-6"X6'-0" D.H.	12
9	NOT USED	-
10	2'-0"X5'-0" D.H.	7
11	NOT USED	-
12	2'-6"X5'-0" D.H.	22
13	2'-6"X3'-4" D.H.	3
14	2'-6"X3'-0" D.H.	5
15	NOT USED	-
16	4'-0"X5'-0" D.H.	3
17	NOT USED	-

NOTES:
- ALL WINDOWS TO HAVE GRIDS U.N.O.
- CONTRACTOR TO CONFIRM ALL WINDOW SIZES AND QUANTITIES

UPPER FLOOR PLAN

2,054 SQ. FT. EXISTING
2,402 SQ. FT. UPPER TOTAL
348 SQ. FT. NEW ADDITION

1/4"=1'-0"

IMPORTANT DISCLOSURE
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WALL LEGEND

	- NEW (N) 2x WALL
	- EXISTING (E) WALL TO BE REMOVED
	- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

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FOWLER HOME + DESIGN

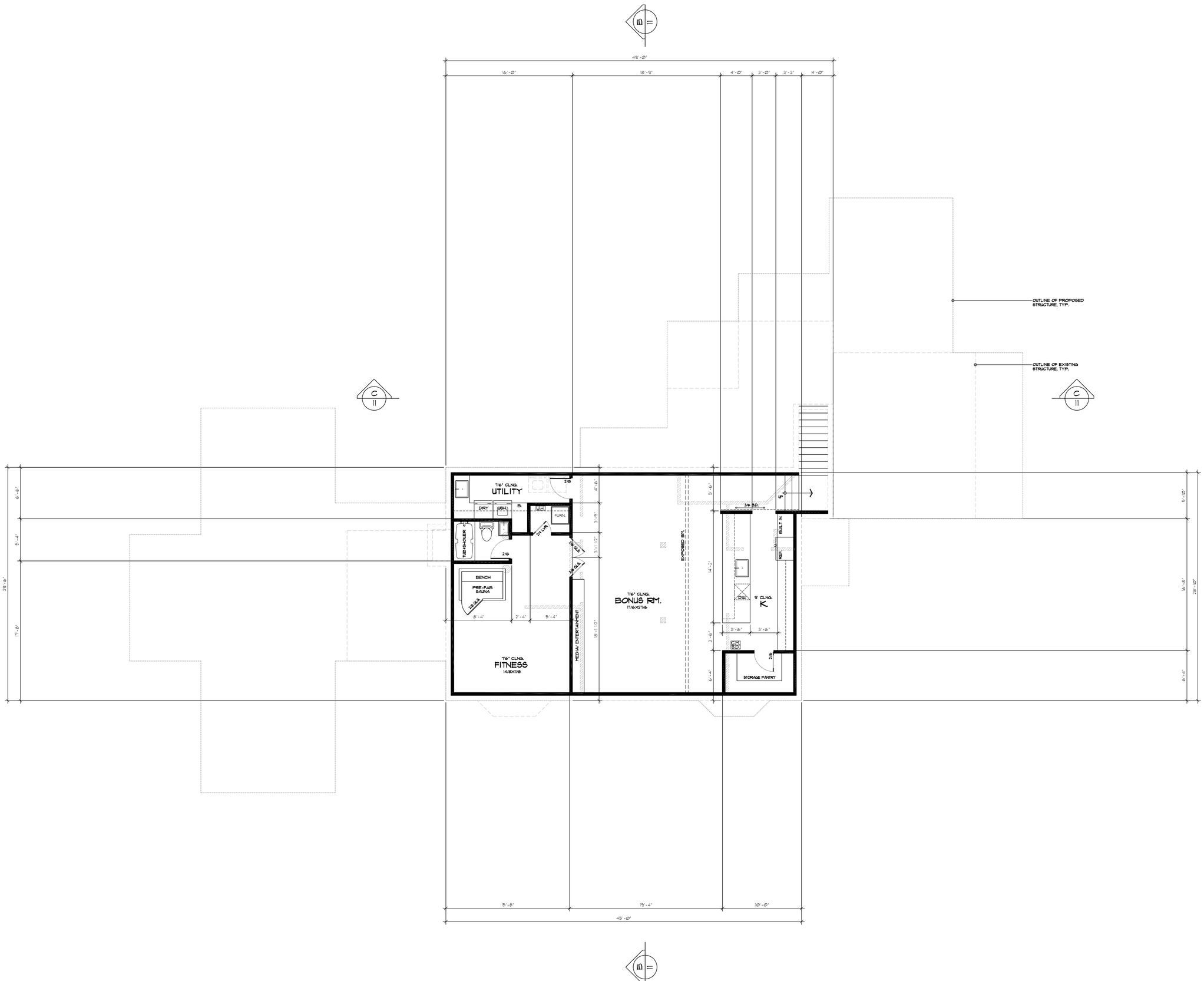
THE EKLUND RESIDENCE
1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 12/20/2024
SCALE: 1/4"=1'-0"
FILE:

UPPER FLOOR

5.1

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LOWER FLOOR PLAN

1,226 SQ. FT. EXISTING

1/4" = 1'-0"

WALL LEGEND

	- NEW (N) 2x WALL
	- EXISTING (E) WALL TO BE REMOVED
	- (E) WALL TO REMAIN

NOTE: WALLS IN LEGEND ENLARGED FOR CLARITY.

ALL DIMENSIONS TO OR FROM (E) STRUCTURE ARE FOR REFERENCE ONLY. CONTRACTOR TO FIELD VERIFY ALL DIMENSIONS AND IS RESPONSIBLE TO CONTACT DESIGNER W/ANY DISCREPENCIES.

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FOWLER HOME + DESIGN

THE EKLUND RESIDENCE

1620 SE WAVERLY DRIVE
MILWAUKIE, OR. 97222

PLAN No.:
DRAWN: T.F.
DATE: 11/6/2024
SCALE: 1/4"=1'-0"
FILE:

LOWER FLOOR

6

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Peter Meijer Architect, PC

Historic Resource Land Use Review – Approval Criteria, Findings, and Recommendations
1620 SE Waverly Drive, Milwaukie, Oregon

Prepared for:
City of Milwaukie, Oregon
January 6, 2025

Description of the Historic Resource Land Use Review Application

The updated proposed work includes the addition of a primary wing located on the east side of the residence, the addition of a 306 sq. ft. prefabricated conservatory at the southwest side of the residence, extending the west garage wall 6 feet, and extending the south kitchen and nook walls 8.5 feet and 6 feet respectively. The total first floor additions including the conservatory is 1,436 sq. ft. A lanai and porch are proposed for the northwest corner of the house.

On the second floor, the updated proposed work includes wall extensions proposed on the east wall at the existing bath, the south wall, and west wall. Other additions to the second floor include a deck to the northwest and south. The roof of the main body of the house will remain the same height as it exists today. A hip roof is proposed for the east wing addition. Other proposed roofs maintain the existing roof slopes and do not exceed the existing maximum height.

The existing north, primary elevation, is proposed to retain some of the original building design. Changes include the design and visual qualities of some replacement windows and the design of the pediments above the second-floor windows on the west wing

Description of the Historic Context and Significance of the Property

Owned by William MacMaster, this home was constructed in 1922 by the Drake-Voss Construction Company as the family's second estate within Waverly. William moved to Oregon in 1883 from Scotland as a financial representative of the Dundee Land Company. He later formed a real estate investment firm with A.H. Birrell in 1890, buying out Birrell in 1903. William co-owned the firm with his son in law beginning in 1922, renaming it to MacMaster and Ireland until William's death. During his lifetime, William was president of the Arlington Club, president of Waverly twice, and president of the Portland Chamber of Commerce twice. Annie MacMaster was the head for all of the YMCA's Pacific Northwest women's war work during World War I.

Character-defining features of this Colonial Revival home as mentioned in the 1988 Cultural Resource Inventory are as follows:

- Primary entrance with paired paneled doors, Swan's neck pediment, full entablature, and Ionic pilasters.
- Stucco exterior cladding
- Quoining, also made of stucco
- Polygonal bays
- End wall chimney

- Palladian window
- Full-height polygonal bay window with tent roof and spandrel
- Belt course above heads of second story windows
- Rectangular plan flanked by two smaller wings on side elevations

As defined by the National Park Service, a Character Defining Feature is a prominent or distinctive aspect, quality, physical feature, or characteristic that contributes significantly to the visual character of a resource. Character Defining Features are character-defining elements that include the overall shape of the building or resource, the materials used in building the resource, the craftsmanship of the resource, the resource's decorative details, the interior spaces and architectural features, and the site and environment of a resource, also known as its context. There are four zones in regards to character-defining features: High, Medium, and Low Preservation Priority, and Non-Historic.

High Preservation Priority features are the most character-defining features of the building that best convey the significant themes associated with the building. These features are to be maintained and preserved. Alterations to finishes may be acceptable, although the form and overall design should be retained. Work to high priority features will be closely reviewed. High Preservation Priority spaces can be public or private with a high level of integrity and history of architectural finishes and features that include original materials or details of highly skilled craftsmanship. Architectural finishes and features should be preserved. Regarding 1620 SE Waverly Drive, the highest priority features are ones visible from the public right of way, including all features comprising original and proposed north elevations, and other elevations that are visible from the public right of way.

Medium Preservation Priority features help to convey the significance of the building, but are not crucial character-defining features. If a Medium Preservation Priority feature were to be removed, the building would still retain its significance, although some unique aspects may be lost. Often, the overall design aspect of the feature is of medium priority, while the finishes or materials may be of a lower priority. Work to medium priority features require design review and may elicit some commentary although contemporary methods, materials, and designs may be sensitively incorporated. The overall project should reach a balance of retaining some Medium Preservation Priority features to allow for alterations to other medium priority features. Alterations should be compatible with the overall historic character of the building. Medium Preservation Priority spaces can be public or private with a moderate level of integrity and history of architectural finishes and features that include original materials or details but are less ornate than High Preservation Priority spaces in overall character. Architectural finishes and features should be preserved. Regarding 1620 SE Waverly Drive, medium priority features are ones not visible from the public right of way, including all features comprising original and proposed south elevations, and other elevations that are not visible from the public right of way.

Low Preservation Priority features are part of the building design, but have little historic character or contribution to the historic significance of the building. Low priority features include service spaces, heavily-altered features, or additions not associated with the period of significance. Alterations to Low Preservation Priority features, while sympathetic to the historic qualities and character of the building, may incorporate extensive changes or total replacement through the introduction of contemporary methods, materials, and designs. Proposed work to Low Preservation Priority features will still be

reviewed in order to monitor the impact to the overall character and significance of the building. Low Preservation Priority spaces are often not public areas but can be private spaces with minimal integrity and history of architectural finishes and features that contain few or no architectural features that need to be preserved or restored as part of a rehabilitation project. Regarding 1620 SE Waverly Drive, there are no low priority features on the exterior of the building. Since the 1988 Cultural Resource Inventory, no significant exterior changes that have required Historic Resource Land Use Review have been made to the building and, to the best of our knowledge, the building retains all of its significant historic character-defining features.

Non-historic features include architectural features or finishes that are not original to the historic building. Non-historic features primarily include walls and doors that are not considered historic, as well as other features that have been changed or added to the building after initial construction. These elements can be removed and altered with minimal care given to minimize impact. Within the City of Milwaukie, certain alterations to historic buildings do not need to be reviewed through the Historic Resource Land Use Review system. These alterations include the repair or replacement of roof materials either in kind or with similar materials, the application of storm windows, etc. While these changes may have been added to 1620 SE Waverly Drive, there are no other non-historic features of finishes present on the building.

Approval Criteria

Milwaukie Zoning Ordinance Title 19, Chapter 19.400 Overlay Zones and Special Areas governs the "identification, protection, enhancement, perpetuation, and use of site, structures, districts, objects, and buildings within the City that reflect the City's unique architectural, archaeological, and historical heritage, and to facilitate preservation of such properties." Any exterior alteration of a "significant" landmark is reviewed under the provisions of Subsection 19.403.5, Alterations and Development, and application is submitted to the City of Milwaukie Planning Commission. The criteria are listed with a response and findings for each, below.

Findings

Findings of the review are based on analyzing and comparing the new materials that were resubmitted as part of the Historic Resource Land Use Review Application, the historic context and significance of the property, and the approval criteria. In PMA's professional opinion, at a minimum to secure approval for this design, preserve all historic materials, design elements, and overall composition, including windows, entries, and west wing pediment design and placement of the north elevations. The north-facing, primary elevations of the home are the most important historic feature to retain. All new elements must match the features of the original. The proposed new east wing should be designed to harmonize with the existing historic structure, maintaining consistency in materials, design, and composition.

1. Retention of Original Construction
Distinguishing original qualities defining a resource's character shall not be destroyed. Removal or alteration of historic materials or distinctive architectural features should be avoided when possible.

The resubmitted project materials propose to redesign the front elevation of the building, including the character-defining pediments above the second story west wing windows and new window designs and door placement throughout the primary elevations. This criterion is therefore not met.

In order to meet this criterion, the character-defining qualities of the entire primary, north, elevations should remain as they currently exist. This includes the existing window designs in order to retain their historic design elements and remain in place as they have historically; window size, design, and placement should match that of the historic size, design, and placement. The windows and associated pediments on the north elevation of the west wing should match in composition and design to that of the historic. The entries on the north elevations should also match that of the historic in size, design, and placement. Preserve all historic materials, design elements, and overall composition, including windows, entries, and west wing pediment design and placement of the north elevations. The north-facing, primary elevations of the home are the most important historic feature to retain. All new elements should match the features and design of the original.

Per the approval criteria, the removal of high preservation priority character-defining features should be avoided when possible. Changes to character defining features as listed in the 1988 Cultural Resource Inventory documentation on primary, north elevations and elevations visible from the public right of way should be avoided. Removal or manipulation of these features will create a home that is near unrecognizable compared to the original and will therefore become an inaccurate representation of the historic building. On the primary, north elevations, replace as needed due to deterioration. Other historic materials or distinctive architectural features that are medium preservation priority features not on the north elevations or not visible from the public right of way and are not mentioned as part of the 1988 Cultural Resource Inventory documentation may be removed or altered, as long as the alterations reflect a simplified style or simplified Colonial Revival style in order to distinguish the new changes from the original.

2. Building Height
Existing building heights should be maintained. Alteration of roof pitches shall be avoided. Raising or lowering a building's permanent elevation when constructing a foundation shall be avoided, except as required by building code or floodplain development permit.

The first page of the plan set labeled “EKLUND FP & EL 12.20.2024” still shows a hip roof proposed for the existing east wing. Other plan drawings show the flat roof will remain as it has historically for this wing. The proposal shows roof alterations on the west wing of the home. The roof height of the main core of the home and the east wing will be maintained. The plan set shows the addition of two pediments on the second floor of the west wing that will not maintain design to that of the historic

existing two pediments. The building's permanent elevation will remain as is and no new foundation under the existing home will be built. This criterion has not been fully addressed and is not yet met.

In order to meet this criterion, the following should be maintained:
- Ensure the retention of the flat roof on the existing east wing of the home;
- Ensure the retention of historic design and composition of the two existing pediments above windows on the west wing of the home; and
- Ensure that the proposed addition and extension of walls at the garage, kitchen and kitchen nook, and east wing will not alter the pitch of the roof to which they are attached.

3. Horizontal Additions

The scale and proportion of building additions, including the relationship of windows to walls, shall be visually compatible with the traditional architectural character of the historic building. Contemporary design for alterations and additions is acceptable if the design respects the building's original design and is compatible with the original scale, materials, and window and door-opening proportions of the building.

The proposed additions and extensions on the west, east, and south elevations are visually compatible with the traditional architectural character and scale of the historic building. Although contemporary in design, the design of these additions and alterations, including the overall scale and design of windows and doors respects the building's original design and are compatible with the original scale and window and door-opening proportions of the building. In order to meet this criterion, ensure that the materials of the east and west additions be visually compatible and respect the original stucco cladding and the Colonial Revival style architecture; ensure the materials of the rear room extensions are visually compatible with that of the historic stucco cladding in order to be visually compatible with the traditional architectural character of the historic building. The design of the new east wing still overlaps with the primary elevation of the historic structure. This design should be revised where the east addition connects with the existing structure. Specifically, instead of extending the existing east wing eastward, the proposed north and south wings of the proposed east addition should be shifted eastward, ensuring that the roofline of this section does not intersect or obscure the historic portion of the building.

4. Windows

Window replacements shall match the visual qualities of original windows as closely as possible. Wood window frames are preferred in meeting this standard. However, if nonwood replacements exhibit similar visual qualities as their wooden counterparts, they may be acceptable. The original number of window panes shall be maintained or restored when replacements are required.

This application proposes to replace or redesign all windows on every elevation. Some of the proposed windows do not match the visual qualities or placement of the original. Therefore, this criterion is not met.

In order to meet this criterion, north elevations window replacements and redesigns need to better match the visual qualities, design, and placement of all historic windows on the north elevations. The windows on the first and second floor of the new west wing should better match those of the existing historic. On the first floor of the west wing, we recommend retaining the location and design

of the existing entryway. On the second floor of the west wing, we recommend the retention of historic design and composition of the two windows and existing pediments above windows. On the first floor of the existing east wing, we recommend retaining the design of the existing entryway. Other window replacements or redesigns should match the visual qualities of the original windows. Maintain the existing number of window panes.

5. *Restoration Possible*

Except where building code precludes it, new additions or alteration to buildings shall be done in such a manner that if such additions or alterations were to be removed in the future, the essential form and integrity of the original building could be restored.

As the new alterations are wood frame construction, in theory this criterion is met. The exterior carport, conservatory, lanais, patio, and porch should be built in such a manner that they can be removed in the future. The architect and build team should ensure that the extensions and additions on the east and south elevations and garage are built in such a way that they can be removed and the original form and integrity of the original building can be restored.

6. *Signs and Lighting*

Signs, lighting, and other appurtenances (such as walls, fences, awnings, and landscaping) shall be visually compatible with the original character of the building.

There is no proposed signage. No lighting was indicated on the exterior primary façade. No elevation or renderings of appurtenances were submitted. Based on no sign, lighting, and other appurtenances submitted, this criterion is met.

7. *Time Period Consistency*

Buildings shall be recognized as products of their own time. Alterations that have no Historical basis or which seek to create an earlier appearance shall be avoided.

The proposed alterations that are allowable based on other approval criteria are proposed to align with the visual qualities of the historic home and Colonial Revival style architecture. No proposed alterations create a false historical basis or create an earlier appearance. This criterion is met.

8. *Visual Integrity/Style*

Distinctive stylistic features, such as a line of columns, piers, spandrels, or other primary structural elements, or examples of skilled craftsmanship which characterize a building, shall be maintained or restored as far as is practicable.

The proposed changes to the north elevations and elevations visible to the public right of way do not meet Criterion 1 *Retention of Original Construction* and Criterion *4 Windows*. Therefore, this criterion is not met. In order to meet this criterion, distinctive stylistic features on the high preservation priority areas of the home, including the north elevations and elevations visible from the public right of way will be maintained or restored if showing signs of deterioration.

9. Replacement or Additional Materials

Whenever possible, deteriorated architectural features shall be repaired rather than replaced. In the event replacement of an existing feature is necessary, or an addition is proposed, new materials should match those of the original building, to the extent possible, in composition, design, color texture, and other visual qualities.

In order to meet this criterion, ensure that deteriorated architectural features are repaired rather than replaced, including the stucco quoining on the front entryway. Ensure all new materials in the proposed additions and extensions, including windows, doors, roofing, cladding, and other detail materials, match those of the original building in composition, design, color, texture, and other visual qualities.

10. Buffering

An appropriate buffer or screen, as provided under Subsection 19.504.6, may be required when a new commercial or industrial improvement or use is proposed on or adjacent to a designated resource, or within or adjacent to an historic district.

There is no new commercial or industrial improvement or use proposed on or adjacent to this home, therefore no buffer or screen is required. This criterion is not applicable.

ELEVATION NOTES:

1. ROOFING MATERIAL TO BE ARCHITECTURAL COMPOSITION MATERIALS AND 5V STANDING SEAM METAL ROOFING SEE ELEVATION PAGE. ROOF SHINGLES TO BE NAILED PER MANUFACTURED INSTRUCTIONS FOR 80 MPH MINIMUM WIND AREAS.
2. ROOF PITCH TO BE SHOWN ON PLANS
3. ALL EAVES TO BE NOTED ON PLANS WITH A 5" GALVANIZED FACIA GUTTER ON SPECIFIED FACIA BD. PROVIDE 3" GALVANIZED DOWNSPOUTS (TOA) AS SHOWN ON ROOF FRAMING PLAN.
4. SIDING NOTED ON PLANS.
5. ALL WINDOW & DOOR TRIM TO BE 5/4 X 4 AT SIDES AND 5/4 X 6 CROWN & SILL.
6. SIDING TO BE SPECIFIED ON PLAN. CAULK ALL CORNER BOARDS, JOINTS, WINDOWS, DOORS AND SURROUNDS.
7. ALL CORNER BOARD TRIM TO BE 2 X 4 PRIMED BD. AS SHOWN ON PLAN.
8. COVERED PORCHES AND EAVE SOFFITS TO BE 1/2" EXT. PLYWOOD OR EQUAL TOO. CAULK ALL JOINTS.
9. MASONARY VENEER TO BE CULTURED STONE OR EQUAL AS SHOWN ON PLAN. PROVIDE GALVANIZED FLASHING ON A MASONARY SILL CAP OVER VENEER. VERIFY LOCATION AND TYPE OF MASONARY WITH BUILDER PRIOR TO CONSTRUCTION.
10. PROVIDE 2 X 10 ROUGH SAWN CEDAR OR EQUAL AT ALL BELLY BANDS WITH A GALVANIZED 12" FLASHING AT EXPOSED TOP. LOCATIONS ARE SHOWN ON PLAN UNLESS OTHERWISE NOTED.
11. PROVIDE VENTS AS SHOWN, SHUTTERS AND TRIMS ON ELEVATIONS AS SHOWN ON PLAN.
12. PROVIDE VINYL WINDOWS AS SHOWN ON PLAN.
13. EXPOSED CONCRETE WALKS TO BE BROOMED FINISH AS SHOWN ON PLAN.
14. MAXIMUM FOUNDATION EXPOSURE TO BE 18" FROM FINISHED GRADE.
15. MAXIMUM SLOPE OF CUTS AND FILLS TO BE TWO (2) HORIZONTAL TO ONE (1) VERTICAL FOR BUILDINGS, STRUCTURES, FOUNDATIONS, AND RETAINING WALLS.
16. FINISH GRADE TO BE 1/ MAXIMUM SLOPE WITH A 6" MINIMUM IN 10'-0" MINIMUM SLOPE AWAY FROM STRUCTURE ALL AROUND.
17. SEE ELEVATIONS FOR ANY ADDITIONAL NOTATIONS THAT MAY BE OF IMPORTANCE.
18. ALL WORK IS TO COMPLY WITH THE LATEST ADOPTED VERSIONS OF THE INTERNATIONAL ONE & TWO FAMILY DWELLING CODE, UNIFORM BUILDING CODE OF ANY APPLICABLE STATE, COUNTY OR LOCAL JURISDICTION.
19. PRIOR TO BEGINING CONSTRUCTION, THE PLANS AND SPECIFICATIONS SHALL BE APPROVED BY THE LOCAL BUILDING AUTHORITY.
20. THE CONTRACTOR IS RESPONSIBLE TO CHECK THE PLANS AND IS TO NOTIFY THE DESIGNER OF ANY ERRORS OR OMISSIONS PRIOR TO THE START AND/OR DURING CONSTRUCTION. THE DESIGNER IS NOT RESPONSIBLE FOR CONSTRUCTION MEANS AND METHODS, ACTS OR OMISSIONS OF THE CONTRACTOR AND/OR SUBCONTRACTOR.
21. BUILDING THIS PLAN ON SITE CONDITIONS DIFFERENT FROM THOSE SHOWN ON THE PLANS MAY REQUIRE MODIFIED FOUNDATION AND FRAMING DETAILS. THE CONTRACTOR IS RESPONSIBLE TO REVIEW SPECIFIC SITE CONDITIONS WITH THE DESIGNER BEFORE CONSTRUCTION INSTALLATION.
22. VERIFY FOUNDATION AND FRAMING DETAILS (WHERE APPLICABLE) WITH MECH, PLUMBING, ELECTRICAL AND OR OTHER SUBCONTRACTORS TO ASSURE PROPER CONSTRUCTION INSTALLATION.
23. PLUMBING, ELECTRICAL AND MECHANICAL DIAGRAMS, LAYOUTS AND/OR DESIGN TO BE
24. SUPPLIED BY CONTRACTOR AND/OR SUB-CONTRACTOR.
25. ENGINEERED PRODUCTS (ROOF TRUSSES, FLOOR JOISTS) TO HAVE DESIGN, ENGINEERING SPECIFICATIONS AND LAYOUT SUPPLIED FROM MANUFACTURER.
26. WRITTEN DIMENSIONS SHALL HAVE PRECEDENCE OVER SCALED DIMENSIONS. DO NOT SCALE THE DRAWINGS. THE CONTRACTOR SHALL VERIFY AND IS RESPONSIBLE FOR ALL DIMENSIONS (INCLUDING ROUGH OPENINGS) AND CONDITIONS ON THE JOB.
27. SPECIFIC MANUFACTURERS AND MATERIALS DEPICTED ON THESE PLANS ARE AN INDICATION OF QUALITY AND STRENGTH. VERIFY ALL CONSTRUCTION MATERIAL SUBSTITUTIONS WITH CURRENT APPLICABLE BUILDING CODES AND LOCAL BUILDING OFFICIALS PRIOR TO INSTALLATION/SUBSTITUTION.
28. CONTRACTOR SHALL BE RESPONSIBLE FOR ANY VARIATIONS OR DEVIATIONS FROM THE ORIGINAL PLANS WITHOUT WRITTEN CONFIRMATION FROM THE DESIGNER.
29. ALL DIMENSIONS AND SQUARE FOOTAGE MAY VARY.
30. THE TYPE OF EXTERIOR FINISH, THE INSTALLATION, AND THE WATERPROOFING DETAILS ARE TO BE THE FULL RESPONSIBILITY OF THE OWNER/BUILDER. THIS DESIGNER ASSUMES NO RESPONSIBILITY OF THE BUILDING ENVELOPE

DESIGN LOADS:

WIND	80 MPH OR LESS
SEISMIC DESIGN CATEGORY	D1
FROST DEPTH	18 INCHES
ROOF DEAD LOAD	11 PSF
ROOF LIVE LOAD	30 PSF
FLOOR DEAD LOAD	10 PSF
FLOOR LIVE LOAD - EXTERIOR	40 PSF
FLOOR LIVE LOAD - SLEEPING	30 PSF
STAIRS	40 PSF
DECKS	60 PSF
GUARDRAILS	200 PSF

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FRONT ELEVATION

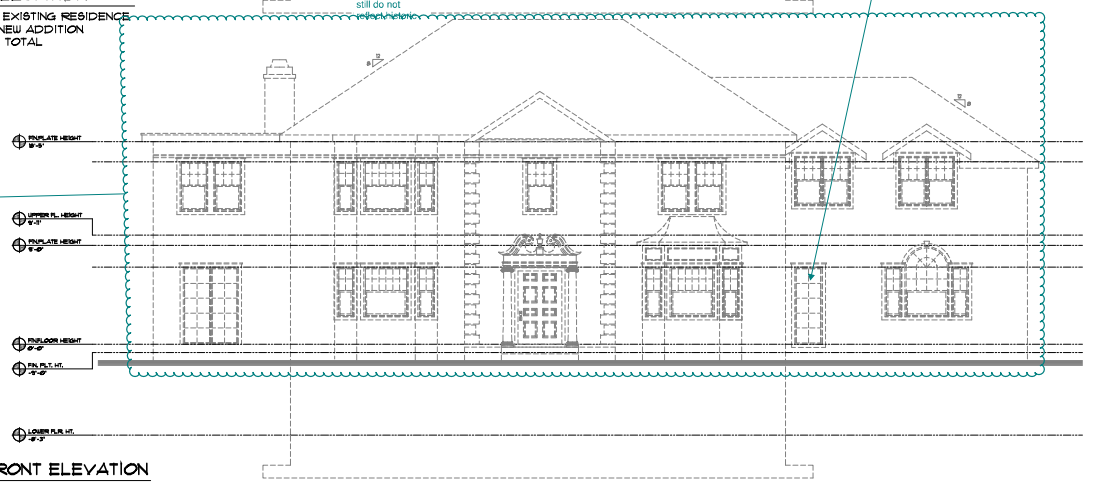
5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL

WINDOW SCHEDULE

MARK	SIZE + TYPE	QUANTITY
1	NOT USED	-
2	NOT USED	-
3	NOT USED	-
4	2-8X4-6D D.H.	5
5	NOT USED	-
6	NOT USED	-
7	NOT USED	-
8	2-8X3-6D D.H.	12
9	NOT USED	-
10	2-8X3-0 D.H.	7
11	NOT USED	-
12	2-8X3-6D D.H.	22
13	2-8X3-0 D.H.	3
14	2-8X3-6 D.H.	9
15	NOT USED	-
16	4-8X3-6 D.H.	3
17	NOT USED	-

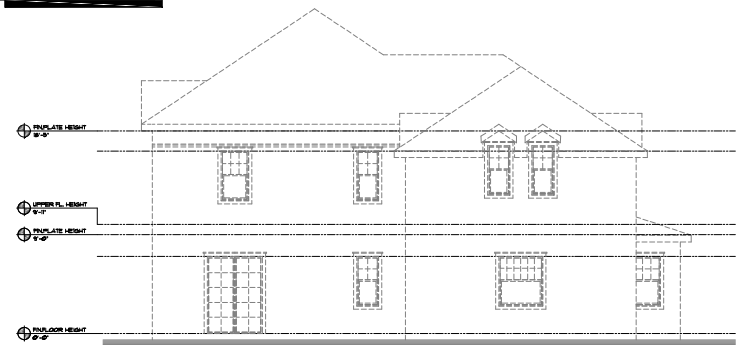
NOTES:
- ALL WINDOWS TO HAVE GRIDS UNO.
- CONTRACTOR TO CONFIRM ALL WINDOW SIZES AND QUANTITIES

These elevations and their features are the most important historic features to retain. All new elements should match the features and design of the original.



EXIST. FRONT ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



EXIST. RIGHT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE



RIGHT SIDE ELEVATION

5,236 SQ. FT. EXISTING RESIDENCE
1,784 SQ. FT. NEW ADDITION
7,020 SQ. FT. TOTAL

FOWLER HOME + DESIGN

5.1 Page 92

THE EKLUND RESIDENCE
1620 SE WAVERLY DRIVE
MILWAUKIE, OR 97222

PLAN No.:
DRAWN: TF
DATE: 2/20/2014
SCALE: 1/4"=1'-0"
FILE:

EXTERIOR ELEVATION

1.

CITY OF MILWAUKIE

To: Planning Commission

Through: Laura Weigel, Planning Manager

From: Vera Kolias, Senior Planner

Date: January 21, 2025, for January 28, 2025, Public hearing

Subject: Primary File #ZA-2024-002 – Oregon Senate Bill 1537 – compliance

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ACTION REQUESTED

Open the public hearing for land use file #ZA-2024-002. Discuss the proposed amendments to the Milwaukie Municipal Code (MMC) Title 19 (Zoning), take public testimony, and provide direction to staff regarding any desired revisions to the proposed amendments.

The requested action this evening is that the Planning Commission recommend City Council approval of file #ZA-2024-002 and adoption of the proposed ordinance and recommended Findings in Support of Approval found in Attachment 1.

BACKGROUND INFORMATION

The purpose of SB 1537, signed into law on March 5, 2024, is to address Oregon's housing supply and affordability crisis. The law becomes effective on January 1, 2025, and sunsets on January 2, 2032, and has several key provisions, summarized here (see Attachment 2):

1. Establishes a new Housing Accountability and Production Office;
2. Requires cities to grant administrative adjustments (variances) to local siting and design standards for housing development;
3. Funds new infrastructure programs and other land readiness costs to support housing development;
4. Establishes a new state revolving loan fund for local governments to administer loans for moderate-income housing development; and
5. Provides a one-time Urban Growth Boundary (UGB) expansion tool, among other land use changes.

This staff report focuses on item #2 above – the required adjustments (variances) to code requirements.

ANALYSIS

SB 1537 – Summary of Required Adjustments

The measure requires local governments to grant land use regulation and design adjustments (what the city refers to as a variance[1]) in certain circumstances. It specifies conditions and timelines under which local governments must grant variances to existing land use regulations and design and development standards for housing development.

The measure also specifies that decisions on these variance applications are limited land use decisions and only the applicant may appeal.

Specific provisions of the required variances:

- An applicant qualifies for a variance if:
    - The development is in a zone that allows residential or mixed-use development;
    - The residential development meets minimum density of 17 du/acre;
    - The residential development is a net increase in new housing units:
        - Single detached dwellings;
        - Mixed use residential with a minimum of 75% residential use;
        - Manufactured dwelling parks;
        - Accessory Dwelling Units (ADUs);
        - Middle housing.
- The variance application cannot ask for more than 10 distinct variances to development standards.
- The application must state how at least one of the following criteria applies:
    - The variances will enable development of housing that is not otherwise feasible due to cost or delay resulting from the base zone standards[2];
    - The variances will enable development of housing that reduces the sale or rental price per dwelling unit;
    - The variances will increase the number of housing units within the application;
    - The variances will enable the provision of accessibility or visitability features in housing units that are not otherwise feasible due to cost or delay resulting from the unadjusted land use regulations[3];
    - All of the dwelling units are subject to an affordable housing covenant making them affordable to moderate income households for a minimum of 30 years;
    - At least 20 percent of the units are subject to an affordable housing covenant making them affordable to low-income households for a minimum of 60 years;
    - All of the units in the application are subject to a zero equity, limited equity, or shared equity ownership model including resident-owned cooperatives and community land trusts making them affordable to moderate income households for a period of 90 years.

[1] The rest of this report will refer to adjustments as variances.
[2] There is no requirement in the bill requiring specific substantiation of this claim.
[3] Ibid.

- A local government must grant a variance to the following[4]:
    - Development standards:
        - Side or rear yard setbacks: 10% variance
        - Common area, minimum landscaping, or open space: reduction of up to 25%
        - Parking quantity minimums
        - Minimum lot size: up to 10%
        - Minimum lot width or depth: up to 10%
        - Maximum lot coverage: up to 10%
        - For manufactured dwelling parks, middle housing, multi-unit residential, and mixed-use residential:
            - Bike parking: minimum number of spaces (0.5 spaces/dwelling required) and location of spaces
            - Max. building height (except cottage clusters): allows additional maximum 1 story or 20 ft
            - Max. density: not more than necessary
            - Prohibition on ground-floor residential: must be allowed except for one building face that abuts the street
            - Prohibition on ground-floor of nonresidential active uses that support the residential use: community rooms, exercise rooms, offices, day care, etc.
            - Building orientation requirements
            - Building height transition requirements
            - Requirements for balconies and porches
            - Requirements for recesses and offsets
    - Design standards:
        - Façade materials, color
        - Façade articulation
        - Roof forms and materials
        - Entry and garage door materials
        - Garage door orientation
        - Window materials
        - Total window area: up to 30% variance; minimum 12% required

Exemption to SB 1537

The measure allows a city to request an exemption from granting mandatory variances in SB 1537 to some or all of the listed standards. When applying for an exemption to a specific standard, the city must show:

- That the listed variance is eligible for a variance within the city's code; AND

[4] This is the list of adjustments specified in SB 1537. An adjustment does not include: accessibility, affordability, tree code, natural resources, Willamette Greenway, fire ingress/egress, or safety.

- That within the last five years the city has approved 90 percent of requested variances.

Section 19.911 of Milwaukie's zoning code provides all the applicability information and procedures for variances. Nearly all the identified variances in SB 1537 can be requested in the city's existing variance code (either Type II or Type III process). While staff can document that over 90% of requested variances over the last five years were approved during the land use review process, the city's code prohibits variances that would result in dwelling units beyond the maximum density. **Therefore, the city cannot request an exemption to that provision of SB 1537 without a code amendment.**

Maximum Density

Maximum density means the maximum number of units allowed in a development per acre of the site. The city's code (Milwaukie Municipal Code (MMC) 19.911.2.B) prohibits variances that would result in dwelling units beyond the maximum density in residential zones (effectively increasing the maximum density of the zone) except for middle housing (not including townhouses). Middle housing is required by the state to be exempt from maximum density, but the city still has maximum density standards that apply to single-detached dwellings and multi-unit developments in our residential zones. That said, the city's code relies primarily on development standards to regulate site development, i.e. development standards effectively keep density under the maximum density. The only way to increase density in a residential zone would be to seek approval for a planned development, which allows a 20% density bonus and the city processes very few planned developments.

To apply for an exemption from SB 1537 the city would need to change the code to allow for variances to the maximum density for single-detached dwellings and multi-unit developments. Staff proposes to allow Type II variances for increases to maximum density by up to 25%. Increases beyond 25% would require a Type III variance. The applicable development standards (maximum lot coverage, setbacks, minimum landscaping, etc.) regulate the "Jello mold" of structures in a development and allow the applicant to fit dwelling units into that Jello mold (See Figure 1). Density maximums only limit the number of units, not the Jello mold of the structure and its relationship to the lot.

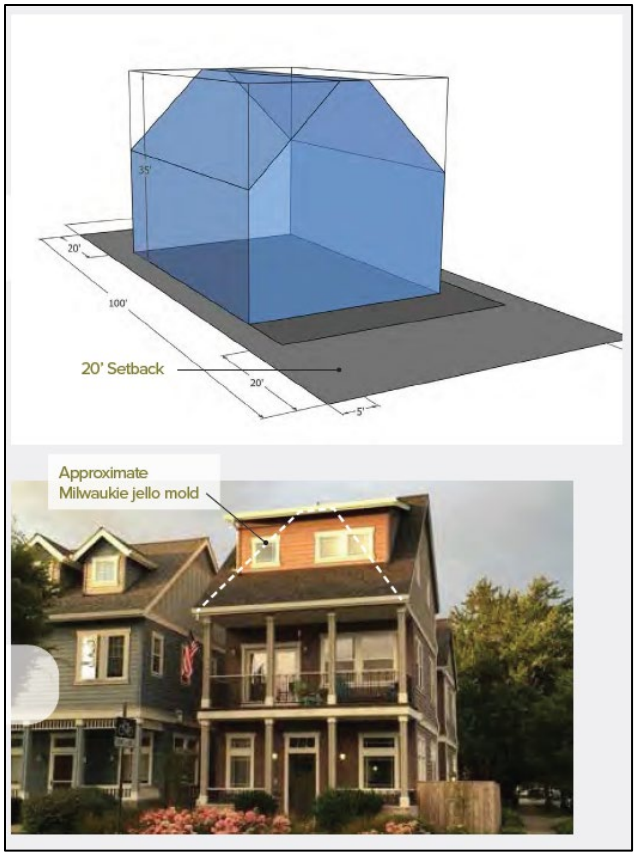


Figure 1. "Jello mold" illustration showing how development standards regulate the mold - regardless of the number of units.

If the City removes the prohibition on density variances and if the city is granted an exemption to the mandatory variance provision for the listed standards in SB 1537 the city would process variance applications as we currently do. The proposal has the added benefit of allowing developers to request variances to construct more much-needed housing.

CONCLUSIONS

Staff recommendation to the Planning Commission

Staff recommends approval of the code amendment removing the prohibition on variances to maximum density in residential and mixed-use zones and provide a Type II variance for increases to maximum density of up to 25%. This would provide flexibility in residential construction and would allow the city to apply for the exemption from SB 1537. A variance would still be required, so the recommendation would not eliminate maximum density, but would allow for the opportunity for flexibility via Type II review with public notice, or Type III review with a public hearing before the Planning Commission and public notice.

If the city does not adopt the code amendment removing the prohibition on variances to maximum density in residential zones, the city must apply the statute to requests for a variance from that standard.

1. Recommend that the City Council approve the proposed amendments to MMC Title 19 (Zoning).
2. Recommend that the City Council adopt the proposed ordinance and attached Findings in Support of Approval presented in Attachments 1 and 1-a, respectively.

Staff discussed this same recommendation with Council on October 15, 2024 and Council concurred with the direction.

Alternatively: If the city elects not to remove the prohibition on requesting a density variance and/or does not qualify for the exemption from the statute, then staff would apply the statue as follows:

Review Process
Variances requested under SB 1537 are limited land use decisions, which means they are Type II administrative decisions (public notice required; Planning Manager is the decision-maker). However, the legislation modifies the Type II process. First, it stipulates that only the applicant may appeal the decision; no notice of the decision is required if the application is denied, other than to the applicant. Second, the statute also includes extensions, alterations, or expansions of nonconforming uses as a type of application that must be processed through the Type II review process. When sending the notice, staff plans to include additional language clarifying that an application is being submitted under SB 1537 so that recipients understand the limitations of input and comments.

Code Approach
Because the provisions of the measure will sunset in 2032, staff recommends that wholesale code amendments implementing the measure are not made. Rather, staff would apply the measure on an as-needed basis when requested by an applicant. The Oregon Department of Land Conservation and Development (DLCD) also does not recommend making code amendments, given the sunset clause.

CODE AUTHORITY AND DECISION-MAKING PROCESS

The proposal is subject to the following provisions of the Milwaukie Municipal Code (MMC):

- MMC Section 19.902 Amendments to Maps and Ordinances
- MMC Section 19.1008 Type V Review

This application is subject to Type V review, which requires the Planning Commission to hold an initial evidentiary hearing to and then forward a recommendation to the City Council for a final decision. Type V applications are legislative in nature and involve the creation, revision, or large-scale implementation of public policy.

The Commission has 4 decision-making options as follows:

A. Recommend that Council approve the proposed amendments as per to the recommended Findings in Support of Approval.

B. Recommend that Council approve the proposed amendments with revisions, including modifications to the recommended Findings in Support of Approval. Such modifications need to be read into the record.

C. Recommend that Council deny the proposed amendments.

D. Continue the hearing.

There is no deadline for a final decision on Type V applications, as they are legislative in nature. However, SB 1537 became effective on January 1, 2025, so a timely application for an exemption is recommended.

COMMENTS

Notice was provided as described in MMC 19.1008, with a 30-day notice and code commentary made available online on December 23, 2024. Email notice was sent to all Neighborhood District Associations (NDAs) on December 26, 2024. The required 35-day notice to Metro and the Department of Land and Conservation Development was posted on December 23, 2024. Notice was also posted at City Hall, Public Safety Building, and the Ledding Library.

ATTACHMENTS

Attachments are provided as indicated by the checked boxes. All material is available for viewing upon request.

	PC Packet	Public Copies	EPacket
1. Ordinance	☒	☒	☒
a. Recommended Findings in Support of Approval	☒	☒	☒
b. Draft code amendment language (underline/strikeout)	☒	☒	☒
c. Draft code amendment language (clean)	☒	☒	☒
2. Text of SB 1537 - Enrolled	☒	☒	☒

Key:
PC Packet = materials provided to Planning Commission 7 days prior to the meeting.
E-Packet = packet materials posted online at https://www.milwaukieoregon.gov/bc-pc/planning-commission-65, available 7 days prior to the meeting.

Findings in Support of Approval
File #ZA-2024-002
Oregon Senate Bill 1537 Code Amendments

Sections of the Milwaukie Municipal Code (MMC) not addressed in these findings are found to be inapplicable to the decision on this application.

1. The applicant, the City of Milwaukie, proposes to make code amendments to MMC Title 19 related to Oregon Senate Bill 1537 (SB 1537) and variances to maximum density. The land use application file number is ZA-2024-002.

2. The proposed amendments relate to compliance with the collection of required variances in SB 1537, which include allowing residential developments to exceed maximum density. The zoning code does not permit variances to maximum density; the proposed amendments would allow a Type III variance for developments seeking to exceed maximum density. This would provide additional opportunities for much needed residential development.

3. Amendments are proposed in the municipal code, as follows:
    - Chapter 19.900 – LAND USE APPLICATIONS
        - Section 19.911 Variances

4. The proposal is subject to the following provisions of the Milwaukie Municipal Code (MMC):
    - MMC Section 19.902 Amendments to Maps and Ordinances
    - MMC Chapter 19.1000 Review Procedures

5. Sections of the MMC not addressed in these findings are found to be not applicable to the decision on this land use application.

6. The application has been processed and public notice provided in accordance with MMC Section 19.1008 Type V Review. Public hearings were held on January 28, 2025 and February 18, 2025 as required by law.

7. MMC Chapter 19.1000 establishes the initiation and review requirements for land use applications. The City Council finds that these requirements have been met as follows.

    a. MMC Subsection 19.1001.6 requires that Type V applications be initiated by the Milwaukie City Council, Planning Commission, Planning Manager, or any individual.

        The amendments were formally initiated by the Planning Manager on December 17, 2024.

    b. MMC Section 19.1008 establishes requirements for Type V review. The procedures for Type V Review have been met as follows:

        (1) Subsection 19.1008.3.A.1 requires opportunity for public comment.

            Opportunity for public comment and review has been provided as follows:

The City Council had a work session on October 15, 2024. The current version of the draft amendments has been posted on the application webpage since December 23, 2024.

(2) Subsection 19.1008.3.A.2 requires notice of public hearing on a Type V Review to be posted on the City website and at City facilities that are open to the public at least 30 days prior to the hearing.

A notice of the Planning Commission's January 28, 2025 hearing was posted as required on December 23, 2024. A notice of the City Council's February 18, 2025 hearing was posted as required on January 14, 2025.

(3) Subsection 19.1008.3.A.3 requires notice be sent to individual property owners if the proposal affects a discrete geographic area or specific properties in the City.

The proposed amendments will apply to all zones that permit residential development. Therefore, notices were not sent.

(4) Subsection 19.1008.3.B requires notice of a Type V application be sent to the Department of Land Conservation and Development (DLCD) 35 days prior to the first evidentiary hearing.

Notice of the proposed amendments was sent to DLCD on December 23, 2024.

(5) Subsection 19.1008.3.C requires notice of a Type V application be sent to Metro 35 days prior to the first evidentiary hearing.

Notice of the proposed amendments was sent to Metro on December 23, 2024.

(6) Subsection 19.1008.3.D requires notice to property owners if, in the Planning Director's opinion, the proposed amendments would affect the permissible uses of land for those property owners.

The proposed amendments will apply to properties in zones that permit residential development and do not affect the already permitted uses on those properties.

(7) Subsection 19.1008.4 and 5 establish the review authority and process for review of a Type V application.

The Planning Commission held a duly advertised public hearing on January 28, 2025 and passed a motion recommending that the City Council approve the proposed amendments. The City Council held a duly advertised public hearing on February 18, 2025 and approved the amendments.

8. MMC 19.902 Amendments to Maps and Ordinances
   a. MMC 19.902.5 establishes requirements for amendments to the text of the zoning ordinance. The City Council finds that these requirements have been met as follows.

      (1) MMC Subsection 19.902.5.A requires that changes to the text of the land use regulations of the Milwaukie Municipal Code shall be evaluated through a Type V review per Section 19.1008.

The Planning Commission held a duly advertised public hearing on January 28, 2025 and passed a motion recommending that the City Council approve the proposed amendments. The City Council held a duly advertised public hearing on February 18, 2025 and approved the amendments. Public notice was provided in accordance with MMC Subsection 19.1008.3.

(2) MMC Subsection 19.902.5.B establishes the approval criteria for changes to land use regulations of the Milwaukie Municipal Code.

(a) MMC Subsection 19.905.B.1 requires that the proposed amendment be consistent with other provisions of the Milwaukie Municipal Code.

The proposed amendments coordinate and are consistent with other provisions of the Milwaukie Municipal Code.

(b) MMC Subsection 19.902.5.B.2 requires that the proposed amendment be consistent with the goals and policies of the Comprehensive Plan.

The goals and policies of the Comprehensive Plan support the amendments to permit additional residential density subject to Type III variance approval.

(c) Section 7 – Housing:

Provide safe, affordable, stable housing for Milwaukie residents of every socioeconomic status and physical ability within dwellings and neighborhoods that are entirely equitable, delightfully livable, and completely sustainable.

(a) Policy 7.1.2

Establish development standards that regulate size, shape, and form and are not exclusively focused on regulating density.

The proposed amendments remove the prohibition on seeking variances that have the effect of allowing a development to exceed maximum density. The proposed amendments include a Type II variance to increase maximum density by 25%. Any requests over 25% would be processed as a Type III variance. Under the current code, only single detached dwellings and multi-unit dwellings are subject to maximum density limitations. While the city works to review overall maximum density regulations, the proposed amendments would allow applicants to seek a variance to this standard. The code already has development standards that would regulate the size and overall massing of a development; the variance would allow the number of units within a development to increase providing more housing opportunities.

(d) MMC Subsection 19.902.5.B.3 requires that the proposed amendment be consistent with the Metro Urban Growth Management Functional Plan and relevant regional policies.

The proposed amendments were sent to Metro for comment. Metro did not identify any inconsistencies with the Metro Urban Growth Management Functional Plan or relevant regional policies. The proposed code amendments are in compliance with Metro's Functional Growth Management Plan.

(e) MMC Subsection 19.902.5.B.4 requires that the proposed amendment be consistent with relevant State statutes and administrative rules, including the Statewide Planning Goals and Transportation Planning Rule.

The proposed amendments were sent to the Department of Land Conservation and Development (DLCD) for comment. The DLCD did not identify any areas where the proposed amendments were inconsistent with State statutes and administrative rules.

(f) MMC Subsection 19.902.5.B.5 requires that the proposed amendment be consistent with relevant federal regulations.

The City Council finds that the Federal Fair Housing Amendments Act of 1988 is relevant to the proposed amendments. The proposed amendments provide a clear and objective review process for middle housing development in the residential zones.

Statewide Findings for Milwaukie Code Amendments – Maximum Density

This memo summarizes the consistency of the proposed code amendments with the following statewide goals, as well as key Oregon Revised Statutes (ORSs) and Oregon Administrative Rules (OARs):

- Goal 10: Housing

Other Statewide Planning Goals are not directly applicable to the proposed code amendments.

Consistency with the applicable goals is a requirement for any amendment to a City's land use ordinances.

Based on the findings described below, the proposed code amendments comply with the applicable Statewide Goals and associated ORS and OAR provisions.

Goal 10: Housing

Goal 10: Housing

Goal 10: To provide for the housing needs of citizens of the state.

Finding: Goal 10 requires the City to maintain and plan for an adequate land supply to accommodate at least 20 years of future growth, providing flexibility in housing location, type, and density to ensure the availability and prices of housing units are commensurate with the needs and financial capabilities of Oregon households. Comprehensive plans are required to include an analysis of community housing needs by type and affordability, an assessment of housing development potential, and an inventory of residential land; contain policies for residential development and supportive services based on that analysis that increase the likelihood that needed housing types will be developed; and provide for an adequate supply of a variety of housing types consistent with identified policies and meeting minimum density and housing mix requirements (established by OAR 660, Division 007).

In 2017 the City adopted its Community Vision which includes the following statement about housing:

"Milwaukie invests in housing options that provide affordability, high quality development and good design, promoting quality living environments. It maintains the small neighborhood feel through creative use of space with housing options that embrace community inclusion and promotes stability."

In order to realize the full vision for the community the next step was to complete a full overhaul of its Comprehensive Plan which was adopted in 2020. The housing component of the plan is critical to realizing the vision and Council has made housing a top priority of the City for the last several years.

In addition to the updated Comprehensive Plan policies supporting housing affordability, equity and choices, the City has conducted several recent planning efforts aimed at addressing similar goals, including the following.

The City's **2023 Housing Capacity Analysis (HCA),** Housing Needs Analysis (HNA), included findings that demonstrate that Milwaukie currently has a range of housing types, including single-family detached and attached homes, duplexes, multi-family, and mixed-use developments, and has sufficient capacity to provide for needed housing during the next 20 years. Over that timeframe, the need for new housing developed in Milwaukie will generally include a wider range of housing types and housing that is more affordable. Milwaukie needs a broader range of housing types with a wider range of price points than are currently available in Milwaukie's housing stock. This includes providing opportunity for the development of housing types across the affordability spectrum, such as single-dwelling detached housing (e.g., small-lot single-dwelling detached units, cottages, accessory dwelling units, and "traditional" single-dwelling homes), town houses, duplexes, triplexes, quadplexes, and multi-dwelling buildings with five or more units. The forecast for new dwelling units needed over the next 20 years is a total of 1,670.

The 2023 **Milwaukie Housing Production Strategy (HPS)** is a blueprint for providing equitable housing opportunities and is intended to help increase the amount of housing in the City. It identifies and describes possible steps to support development of new affordable housing, preserve existing affordable housing, stabilize households at risk of displacement, and help address houselessness. The HPS is intended to provide the City with additional options to support affordable housing development and preservation. Individually, these actions may not result in a large change in the availability of affordable housing, but they provide the City with policies to support development proposals that can create substantial change in the availability of affordable housing. The actions in the HPS are intended to encourage the development of more affordable and diverse housing types; grow partnerships with housing providers, developers, and agencies involved in housing issues; and increase housing stability for Milwaukie residents. Increasing capacity, particularly in the high density residential zone, is a key strategy involving increasing density to allow for more development of multi-unit housing.

While the city works on an initiative to increase residential densities, the proposed code amendments are targeted toward increasing density via variances. Maximum density standards generally apply only to single detached and multi-unit dwellings. The existing code prohibits variances that would have the effect of exceeding maximum density. The proposed amendments remove that prohibition and include a Type II variance when increasing density up to 25% over the maximum density. By allowing density increases beyond the maximum, housing choice and opportunities to expand housing options are made possible.

The city's Community Development Department will continue to work on ways to assist in the development of housing, provide incentives for regulated affordable housing development,

provide incentives for the retention or conversion of existing affordable housing supply, and provide incentives and reduce barriers within the development code.

Based on the findings above, the Comprehensive Plan Amendment is consistent with Statewide Planning Goal 10.

Underline/strikeout Amendments

CHAPTER 19.900 LAND USE APPLICATIONS

19.911 Variances

19.911.2 Applicability

B. Ineligible Variances

A variance may not be requested for the following purposes:

1. To eliminate restrictions on uses or development that contain the word "prohibited."

2. To change a required review type.

3. To change or omit the steps of a procedure.

4. To change a definition.

~~5. To increase, or have the same effect as increasing, the maximum permitted density for a residential zone.~~

~~6.~~ 5. To justify or allow a Building Code violation.

~~7.~~ 6. To allow a use that is not allowed outright by the base zone. Requests of this nature may be allowed through the use exception provisions in Subsection 19.911.5, nonconforming use replacement provisions in Subsection 19.804.1.B.2, conditional use provisions in Section 19.905, or community service use provisions in Section 19.904.

19.911.3 Review Process.

B. Type II Variances

Type II variances allow for limited variations to numerical standards. The following types of variance requests shall be evaluated through a Type II review per Section 19.1005:

1. A variance of up to 40% to a side yard width standard.

2. A variance of up to 25% to a front, rear, or street side yard width standard. A front yard width may not be reduced to less than 15 ft through a Type II review.

3. A variance of up to 10% to lot coverage or minimum vegetation standards.

4. A variance of up to 10% to lot width or depth standards.

5. A variance of up to 10% to a lot frontage standard.

6. A variance to compliance with Subsection 19.505.1.C.4 Detailed Design, or with SubSection 19.901.1.E.4.c.(1) in cases where a unique and creative housing design merits flexibility from the requirements of that subsection.

7. A variance to compliance with Subsection 19.505.7.C Building Design Standards in cases where a unique design merits flexibility from the requirements of that subsection.

8. A variance to fence height to allow up to a maximum of 6 ft for front yard fences and 8 ft for side yard, street side yard, and rear yard fences. Fences shall meet clear vision standards provided in Chapter 12.24.

9. A variance of up to a 25% increase in the size of an Accessory Dwelling Unit as identified in Subsection 19.910.1.E.4.

10. A variance to interior height of a garage in a cottage cluster to allow up to a maximum of 15 ft for cases that would use space saving parking technology (e.g., interior car stacking) that might require additional interior height.

11. For any middle housing development, except townhouses and cottage clusters, that includes at least one dwelling unit that is affordable that meets the exemption standards as defined in Section 3.60.050, the minimum setbacks in Table 19.301.4 may be reduced to the following:

a. Front yard: 10 ft

b. Rear yard: 10 ft

c. Side yard: 5 ft

d. Street side yard: 10 ft

12. A variance of up to a 25% increase to the maximum density standard in residential and mixed-use zones.

Clean Amendments

CHAPTER 19.900 LAND USE APPLICATIONS

19.911 Variances

19.911.2 Applicability

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A variance may not be requested for the following purposes:

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2. To change a required review type.

3. To change or omit the steps of a procedure.

4. To change a definition.

5. To justify or allow a Building Code violation.

6. To allow a use that is not allowed outright by the base zone. Requests of this nature may be allowed through the use exception provisions in Subsection 19.911.5, nonconforming use replacement provisions in Subsection 19.804.1.B.2, conditional use provisions in Section 19.905, or community service use provisions in Section 19.904.

19.911.3 Review Process.

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Type II variances allow for limited variations to numerical standards. The following types of variance requests shall be evaluated through a Type II review per Section 19.1005:

1. A variance of up to 40% to a side yard width standard.

2. A variance of up to 25% to a front, rear, or street side yard width standard. A front yard width may not be reduced to less than 15 ft through a Type II review.

3. A variance of up to 10% to lot coverage or minimum vegetation standards.

4. A variance of up to 10% to lot width or depth standards.

5. A variance of up to 10% to a lot frontage standard.

6. A variance to compliance with Subsection 19.505.1.C.4 Detailed Design, or with SubSection 19.901.1.E.4.c.(1) in cases where a unique and creative housing design merits flexibility from the requirements of that subsection.

7. A variance to compliance with Subsection 19.505.7.C Building Design Standards in cases where a unique design merits flexibility from the requirements of that subsection.

8. A variance to fence height to allow up to a maximum of 6 ft for front yard fences and 8 ft for side yard, street side yard, and rear yard fences. Fences shall meet clear vision standards provided in Chapter 12.24.

9. A variance of up to a 25% increase in the size of an Accessory Dwelling Unit as identified in Subsection 19.910.1.E.4.

10. A variance to interior height of a garage in a cottage cluster to allow up to a maximum of 15 ft for cases that would use space saving parking technology (e.g., interior car stacking) that might require additional interior height.

11. For any middle housing development, except townhouses and cottage clusters, that includes at least one dwelling unit that is affordable that meets the exemption standards as defined in Section 3.60.050, the minimum setbacks in Table 19.301.4 may be reduced to the following:

a. Front yard: 10 ft

b. Rear yard: 10 ft

c. Side yard: 5 ft

d. Street side yard: 10 ft

12. A variance of up to a 25% increase to the maximum density standard in residential and mixed-use zones.

82nd OREGON LEGISLATIVE ASSEMBLY--2024 Regular Session

Enrolled
Senate Bill 1537

Printed pursuant to Senate Interim Rule 213.28 by order of the President of the Senate in conformance with presession filing rules, indicating neither advocacy nor opposition on the part of the President (at the request of Governor Tina Kotek for Office of the Governor)

CHAPTER .....

AN ACT

Relating to housing; creating new provisions; amending ORS 183.471, 197.015, 197.195, 197.335, 197.843, 215.427, 227.178 and 455.770; and prescribing an effective date.

Be It Enacted by the People of the State of Oregon:

HOUSING ACCOUNTABILITY AND PRODUCTION OFFICE

SECTION 1. Housing Accountability and Production Office. (1) The Department of Land Conservation and Development and the Department of Consumer and Business Services shall enter into an interagency agreement to establish and administer the Housing Accountability and Production Office.

(2) The Housing Accountability and Production Office shall:

(a) Provide technical assistance, including assistance through grants, to local governments to:

(A) Comply with housing laws;

(B) Reduce permitting and land use barriers to housing production; and

(C) Support reliable and effective implementation of local procedures and standards relating to the approval of residential development projects.

(b) Serve as a resource, which includes providing responses to requests for technical assistance with complying with housing laws, to:

(A) Local governments, as defined in ORS 174.116; and

(B) Applicants for land use and building permits for residential development who are experiencing permitting and land use barriers related to housing production.

(c) Investigate and respond to complaints of violations of housing laws under section 2 of this 2024 Act.

(d) Establish best practices related to model codes, typical drawings and specifications as described in ORS 455.062, procedures and practices by which local governments may comply with housing laws.

(e) Provide optional mediation of active disputes relating to housing laws between a local government and applicants for land use and building permits for residential development, including mediation under ORS 197.860.

(f) Coordinate agencies that are involved in the housing development process, including, but not limited to, the Department of Land Conservation and Development, Department of

Consumer and Business Services, Housing and Community Services Department and Oregon Business Development Department, to enable the agencies to support local governments and applicants for land use and building permits for residential development by identifying state agency technical and financial resources that can address identified housing development and feasibility barriers.

(g) Establish policy and funding priorities for state agency resources and programs for the purpose of addressing barriers to housing production, including, but not limited to, making recommendations for moneys needed for the purposes of section 35 of this 2024 Act.

(3) The Land Conservation and Development Commission and the Department of Consumer and Business Services shall coordinate in adopting, amending or repealing rules for:

(a) Carrying out the respective responsibilities of the departments and the office under sections 1 to 5 of this 2024 Act.

(b) Model codes, development plans, procedures and practices by which local governments may comply with housing laws.

(c) Establishing standards by which complaints are investigated and pursued.

(4) The office shall prioritize assisting local governments in voluntarily undertaking changes to come into compliance with housing laws.

(5) As used in sections 1 to 5 of this 2024 Act:

(a) "Housing law" means ORS chapter 197A and ORS 92.010 to 92.192, 92.830 to 92.845, 197.360 to 197.380, 197.475 to 197.493, 197.505 to 197.540, 197.660 to 197.670, 197.748, 215.402 to 215.438, 227.160 to 227.186, 455.148, 455.150, 455.152, 455.153, 455.156, 455.157, 455.165, 455.170, 455.175, 455.180, 455.185 to 455.198, 455.200, 455.202 to 455.208, 455.210, 455.220, 455.465 and 455.467 and administrative rules implementing those laws, to the extent that the law or rule imposes a mandatory duty on a local government or its officers, employees or agents and the application of the law or rule applies to residential development or pertains to a permit for a residential use or a division of land for residential purposes.

(b) "Residential" includes mixed-use residential development.

SECTION 2. Office responses to violations of housing laws. (1) The Housing Accountability and Production Office shall establish a form or format through which the office receives allegations of local governments' violations of housing laws that impact housing production. For complaints that relate to a specific development project, the office may receive complaints only from the project applicant. For complaints not related to a specific development project, the office may receive complaints from any person within the local government's jurisdiction or the Department of Land Conservation and Development or the Department of Consumer and Business Services.

(2)(a) Except as provided in paragraph (c) of this subsection, the office shall investigate suspected violations of housing laws or violations credibly alleged under subsection (1) of this section.

(b) The office shall develop consistent procedures to evaluate and determine the credibility of alleged violations of housing laws.

(c) If a complainant has filed a notice of appeal with the Land Use Board of Appeals or has initiated private litigation regarding any aspect of the application decision that was alleged to have been the subject of the housing law violation, the office may not further participate in the specific complaint or its appeal, except for:

(A) Providing agency briefs, including briefs under ORS 197.830 (8), to the board or the court;

(B) Providing technical assistance to the local government unrelated to the resolution of the specific complaint; or

(C) Mediation at the request of the local government and complainant, including mediation under ORS 197.860.

(3)(a) If the office has a reasonable basis to conclude that a violation was or is being committed, the office shall deliver written warning notice to the local government specifying

the violation and any authority under this section that the office intends to invoke if the violation continues or is not remedied. The notice must include an invitation to address or remedy the suspected violation through mediation, the execution of a compliance agreement to voluntarily remedy the situation, the adoption of suitable model codes developed by the office under section 1 (3)(b) of this 2024 Act or other remedies suitable to the specific violation.

(b) The office shall prioritize technical assistance funding to local governments that agree to comply with housing laws under this subsection.

(c) A determination by the office is not a legislative, judicial or quasi-judicial decision.

(4) No earlier than 60 days after a warning notice is delivered under subsection (3) of this section, the office may:

(a) Initiate a request for an enforcement order of the Land Conservation and Development Commission by delivering a notice of request under section 3 (3) of this 2024 Act.

(b) Seek a court order against a local government as described under ORS 455.160 (3) without being adversely affected or serving the demand as described in ORS 455.160 (2).

(c) Notwithstanding ORS 197.090 (2)(b) to (e), participate in and seek review of a matter under ORS 197.090 (2)(a) that pertains to housing laws without the notice or consent of the commission. No less than once every two years, the office shall report to the commission on the matters in which the office participated under this paragraph.

(d) Except regarding matters under the exclusive jurisdiction of the Land Use Board of Appeals, apply to a circuit court for an order compelling compliance with any housing law. If the court finds that the defendant is not complying with a housing law, the court may grant an injunction requiring compliance.

(5) The office may not, in the name of the office, exercise the authority of the Department of Land Conservation and Development under ORS 197A.130.

(6) The office shall send notice to each complainant under subsection (1) of this section at the time that the office:

(a) Takes any action under subsection (3) or (4) of this section; or

(b) Has determined that it will not take further actions or make further investigations.

(7) The actions authorized of the office under this section are in addition to and may be exercised in conjunction with any other investigative or enforcement authority that may be exercised by the Department of Land Conservation and Development, the Land Conservation and Development Commission or the Department of Consumer and Business Services.

(8) Nothing in this section:

(a) Amends the jurisdiction of the Land Use Board of Appeals or of a circuit court;

(b) Creates a new cause of action; or

(c) Tolls or extends:

(A) The statute of limitations for any claim; or

(B) The deadline for any appeal or other action.

SECTION 3. Office enforcement orders. (1) The Housing Accountability and Production Office may request an enforcement order under section 2 (4)(a) of this 2024 Act requiring that a local government take action necessary to bring its comprehensive plan, land use regulation, limited land use decisions or other land use decisions or actions into compliance with a housing law, except for a housing law that pertains to the state building code or the administration of the code.

(2) Except as otherwise provided in this section, a request for an enforcement order by the office is subject to the applicable provisions of ORS 197.335 and ORS chapter 183 and is not subject to ORS 197.319, 197.324 or 197.328.

(3) The office shall make a request for an enforcement order under this section by delivering a notice to the local government that states the grounds for initiation and summarizes the procedures for the enforcement order proceeding along with a copy of the notice

to the Land Conservation and Development Commission. A decision of the office to initiate an enforcement order is not subject to appeal.

(4) After receiving notice of an enforcement order request under subsection (3) of this section, the local government shall deliver a notice to an affected applicant, if any, in substantially the following form:

NOTICE: The Housing Accountability and Production Office has found good cause for an enforcement proceeding against _____ (name of local government). An enforcement order may be adopted that could limit, prohibit or require the application of specified criteria to any action authorized by this decision but not applied for until after the adoption of the enforcement order. Future applications for building permits or time extensions may be affected.

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(5) Within 14 days after receipt by the commission of the notice under subsection (3) of this section, the Director of the Department of Land Conservation and Development shall assign the enforcement order proceedings to a hearings officer who is:

(a) An administrative law judge assigned under ORS 183.635; or

(b) A hearings officer randomly selected from a pool of officers appointed by the commission to review proceedings initiated under this section.

(6) The hearings officer shall schedule a contested case hearing within 60 days of the delivery of the notice to the commission under subsection (3) of this section.

(7)(a) The hearings officer shall prepare a proposed enforcement order or order of dismissal, including recommended findings and conclusions of law.

(b) A proposed enforcement order may require the local government to take any necessary action to comply with housing laws that is suitable to address the basis for the proposed enforcement order, including requiring the adoption or application of suitable models that have been developed by the office under section 1 (3)(b) of this 2024 Act.

(c) The hearings officer must issue and serve the proposed enforcement order on the office and all parties to the hearing within 30 days of the date the record closed.

(8)(a) The proposed enforcement order becomes a final order of the commission 14 days after service on the office and all parties to the hearing, unless the office or a party to the hearing appeals the proposed enforcement order to the commission prior to the proposed enforcement order becoming final.

(b) If the proposed enforcement order is appealed, the commission shall consider the matter at:

(A) Its next regularly scheduled meeting; or

(B) If the appeal is made 45 or fewer days prior to the next regularly scheduled meeting, at the following regularly scheduled meeting or a special meeting held earlier.

(9) The commission shall affirm, affirm with modifications or reverse the proposed enforcement order. The commission shall issue a final order no later than 30 days after the meeting at which it considered the matter.

(10) The commission may adopt rules administering this section, including rules related to standing, preserving issues for commission review or other provisions concerning the commission's scope and standard for review of proposed enforcement orders under this section.

SECTION 4. Housing Accountability and Production Office Fund. (1) The Housing Accountability and Production Office Fund is established in the State Treasury, separate and distinct from the General Fund.

(2) The Housing Accountability and Production Office Fund consists of moneys appropriated, allocated, deposited or transferred to the fund by the Legislative Assembly or otherwise.

(3) Interest earned by the fund shall be credited to the fund.

(4) Moneys in the fund are continuously appropriated to the Department of Land Conservation and Development to administer the fund, to operate the Housing Accountability and Production Office and to implement sections 1 to 5 of this 2024 Act.

SECTION 5. Reporting. On or before September 15, 2026, the Housing Accountability and Production Office shall:

(1) Contract with one or more organizations possessing relevant expertise to produce a report identifying improvements in the local building plan review approval, design review approval, land use, zoning and permitting processes, including but not limited to plan review approval timelines, process efficiency, local best practices and other ways to accelerate and improve the efficiency of the development process for construction, with a focus on increasing housing production.

(2) Produce a report based on a study by the office of state and local timelines and standards related to public works and building permit application review and develop recommendations for changes to reduce complexity, delay or costs that inhibit housing production, including an evaluation of their effect on the feasibility of varying housing types and affordability levels.

(3) Produce a report summarizing state agency plans, policies and programs related to reducing or eliminating regulatory barriers to the production of housing. The report must also include recommendations on how state agencies may prioritize resources and programs to increase housing production.

(4) Provide the reports under subsections (1) to (3) of this section to one or more appropriate interim committees of the Legislative Assembly in the manner provided in ORS 192.245.

SECTION 6. Sunset. Section 5 of this 2024 Act is repealed on January 2, 2027.

SECTION 7. Operative and applicable dates. (1) Sections 2 and 3 of this 2024 Act become operative on July 1, 2025.

(2) Sections 2 and 3 of this 2024 Act apply only to violations of housing laws occurring on or after July 1, 2025.

(3) The Department of Land Conservation and Development and Department of Consumer and Business Services may take any action before the operative date specified in subsection (1) of this section that is necessary for the departments or the Housing Accountability and Production Office to exercise, on and after the operative date, all of the duties, functions and powers conferred by sections 1 to 5, 35, 39 and 46 of this 2024 Act.

OPTING IN TO AMENDED HOUSING REGULATIONS

SECTION 8. ORS 215.427 is amended to read:

215.427. (1) Except as provided in subsections (3), (5) and (10) of this section, for land within an urban growth boundary and applications for mineral aggregate extraction, the governing body of a county or its designee shall take final action on an application for a permit, limited land use decision or zone change, including resolution of all appeals under ORS 215.422, within 120 days after the application is deemed complete. The governing body of a county or its designee shall take final action on all other applications for a permit, limited land use decision or zone change, including resolution of all appeals under ORS 215.422, within 150 days after the application is deemed complete, except as provided in subsections (3), (5) and (10) of this section.

(2) If an application for a permit, limited land use decision or zone change is incomplete, the governing body or its designee shall notify the applicant in writing of exactly what information is missing within 30 days of receipt of the application and allow the applicant to submit the missing

information. The application shall be deemed complete for the purpose of subsection (1) of this section and ORS 197A.470 upon receipt by the governing body or its designee of:

(a) All of the missing information;

(b) Some of the missing information and written notice from the applicant that no other information will be provided; or

(c) Written notice from the applicant that none of the missing information will be provided.

(3)(a) If the application was complete when first submitted or the applicant submits additional information[*, as described in subsection (2) of this section,*] within 180 days of the date the application was first submitted [*and the county has a comprehensive plan and land use regulations acknowledged under ORS 197.251*], approval or denial of the application [*shall be based*] **must be based:**

(A) Upon the standards and criteria that were applicable at the time the application was first submitted[.]**; or**

(B) For an application relating to development of housing, upon the request of the applicant, those standards and criteria that are operative at the time of the request.

(b) If an applicant requests review under different standards as provided in paragraph (a)(B) of this subsection:

(A) For the purposes of this section, any applicable timelines for completeness review and final decisions restart as if a new application were submitted on the date of the request;

(B) For the purposes of this section and ORS 197A.470 the application is not deemed complete until:

(i) The county determines that additional information is not required under subsection (2) of this section; or

(ii) The applicant makes a submission under subsection (2) of this section in response to a county's request;

(C) A county may deny a request under paragraph (a)(B) of this subsection if:

(i) The county has issued a public notice of the application; or

(ii) A request under paragraph (a)(B) of this subsection was previously made; and

(D) The county may not require that the applicant:

(i) Pay a fee, except to cover additional costs incurred by the county to accommodate the request;

(ii) Submit a new application or duplicative information, unless information resubmittal is required because the request affects or changes information in other locations in the application or additional narrative is required to understand the request in context; or

(iii) Repeat redundant processes or hearings that are inapplicable to the change in standards or criteria.

[*(b) If the application is for industrial or traded sector development of a site identified under section 12, chapter 800, Oregon Laws 2003, and proposes an amendment to the comprehensive plan, approval or denial of the application must be based upon the standards and criteria that were applicable at the time the application was first submitted, provided the application complies with paragraph (a) of this subsection.*]

(4) On the 181st day after first being submitted, the application is void if the applicant has been notified of the missing information as required under subsection (2) of this section and has not submitted:

(a) All of the missing information;

(b) Some of the missing information and written notice that no other information will be provided; or

(c) Written notice that none of the missing information will be provided.

(5) The period set in subsection (1) of this section or the 100-day period set in ORS 197A.470 may be extended for a specified period of time at the written request of the applicant. The total of all extensions, except as provided in subsection (10) of this section for mediation, may not exceed 215 days.

(6) The period set in subsection (1) of this section applies:

(a) Only to decisions wholly within the authority and control of the governing body of the county; and

(b) Unless the parties have agreed to mediation as described in subsection (10) of this section or ORS 197.319 (2)(b).

(7) Notwithstanding subsection (6) of this section, the period set in subsection (1) of this section and the 100-day period set in ORS 197A.470 do not apply to:

(a) A decision of the county making a change to an acknowledged comprehensive plan or a land use regulation that is submitted to the Director of the Department of Land Conservation and Development under ORS 197.610; or

(b) A decision of a county involving an application for the development of residential structures within an urban growth boundary, where the county has tentatively approved the application and extends these periods by no more than seven days in order to assure the sufficiency of its final order.

(8) Except when an applicant requests an extension under subsection (5) of this section, if the governing body of the county or its designee does not take final action on an application for a permit, limited land use decision or zone change within 120 days or 150 days, as applicable, after the application is deemed complete, the county shall refund to the applicant either the unexpended portion of any application fees or deposits previously paid or 50 percent of the total amount of such fees or deposits, whichever is greater. The applicant is not liable for additional governmental fees incurred subsequent to the payment of such fees or deposits. However, the applicant is responsible for the costs of providing sufficient additional information to address relevant issues identified in the consideration of the application.

(9) A county may not compel an applicant to waive the period set in subsection (1) of this section or to waive the provisions of subsection (8) of this section or ORS 197A.470 or 215.429 as a condition for taking any action on an application for a permit, limited land use decision or zone change except when such applications are filed concurrently and considered jointly with a plan amendment.

(10) The periods set forth in subsections (1) and (5) of this section and ORS 197A.470 may be extended by up to 90 additional days, if the applicant and the county agree that a dispute concerning the application will be mediated.

SECTION 9. ORS 227.178 is amended to read:

227.178. (1) Except as provided in subsections (3), (5) and (11) of this section, the governing body of a city or its designee shall take final action on an application for a permit, limited land use decision or zone change, including resolution of all appeals under ORS 227.180, within 120 days after the application is deemed complete.

(2) If an application for a permit, limited land use decision or zone change is incomplete, the governing body or its designee shall notify the applicant in writing of exactly what information is missing within 30 days of receipt of the application and allow the applicant to submit the missing information. The application shall be deemed complete for the purpose of subsection (1) of this section or ORS 197A.470 upon receipt by the governing body or its designee of:

(a) All of the missing information;

(b) Some of the missing information and written notice from the applicant that no other information will be provided; or

(c) Written notice from the applicant that none of the missing information will be provided.

(3)(a) If the application was complete when first submitted or the applicant submits the requested additional information within 180 days of the date the application was first submitted [*and the city has a comprehensive plan and land use regulations acknowledged under ORS 197.251*], approval or denial of the application [*shall*] **must** be based**:**

(A) Upon the standards and criteria that were applicable at the time the application was first submitted[.]**; or**

(B) For an application relating to development of housing, upon the request of the applicant, those standards and criteria that are operative at the time of the request.

(b) If an applicant requests review under different standards as provided in paragraph (a)(B) of this subsection:

(A) For the purposes of this section, any applicable timelines for completeness review and final decisions restart as if a new application were submitted on the date of the request;

(B) For the purposes of this section and ORS 197A.470 the application is not deemed complete until:

(i) The city determines that additional information is not required under subsection (2) of this section; or

(ii) The applicant makes a submission under subsection (2) of this section in response to a city's request;

(C) A city may deny a request under paragraph (a)(B) of this subsection if:

(i) The city has issued a public notice of the application; or

(ii) A request under paragraph (a)(B) of this subsection was previously made; and

(D) The city may not require that the applicant:

(i) Pay a fee, except to cover additional costs incurred by the city to accommodate the request;

(ii) Submit a new application or duplicative information, unless information resubmittal is required because the request affects or changes information in other locations in the application or additional narrative is required to understand the request in context; or

(iii) Repeat redundant processes or hearings that are inapplicable to the change in standards or criteria.

[*(b) If the application is for industrial or traded sector development of a site identified under section 12, chapter 800, Oregon Laws 2003, and proposes an amendment to the comprehensive plan, approval or denial of the application must be based upon the standards and criteria that were applicable at the time the application was first submitted, provided the application complies with paragraph (a) of this subsection.*]

(4) On the 181st day after first being submitted, the application is void if the applicant has been notified of the missing information as required under subsection (2) of this section and has not submitted:

(a) All of the missing information;

(b) Some of the missing information and written notice that no other information will be provided; or

(c) Written notice that none of the missing information will be provided.

(5) The 120-day period set in subsection (1) of this section or the 100-day period set in ORS 197A.470 may be extended for a specified period of time at the written request of the applicant. The total of all extensions, except as provided in subsection (11) of this section for mediation, may not exceed 245 days.

(6) The 120-day period set in subsection (1) of this section applies:

(a) Only to decisions wholly within the authority and control of the governing body of the city; and

(b) Unless the parties have agreed to mediation as described in subsection (11) of this section or ORS 197.319 (2)(b).

(7) Notwithstanding subsection (6) of this section, the 120-day period set in subsection (1) of this section and the 100-day period set in ORS 197A.470 do not apply to:

(a) A decision of the city making a change to an acknowledged comprehensive plan or a land use regulation that is submitted to the Director of the Department of Land Conservation and Development under ORS 197.610; or

(b) A decision of a city involving an application for the development of residential structures within an urban growth boundary, where the city has tentatively approved the application and extends these periods by no more than seven days in order to assure the sufficiency of its final order.

(8) Except when an applicant requests an extension under subsection (5) of this section, if the governing body of the city or its designee does not take final action on an application for a permit,

limited land use decision or zone change within 120 days after the application is deemed complete, the city shall refund to the applicant, subject to the provisions of subsection (9) of this section, either the unexpended portion of any application fees or deposits previously paid or 50 percent of the total amount of such fees or deposits, whichever is greater. The applicant is not liable for additional governmental fees incurred subsequent to the payment of such fees or deposits. However, the applicant is responsible for the costs of providing sufficient additional information to address relevant issues identified in the consideration of the application.

(9)(a) To obtain a refund under subsection (8) of this section, the applicant may either:

(A) Submit a written request for payment, either by mail or in person, to the city or its designee; or

(B) Include the amount claimed in a mandamus petition filed under ORS 227.179. The court shall award an amount owed under this section in its final order on the petition.

(b) Within seven calendar days of receiving a request for a refund, the city or its designee shall determine the amount of any refund owed. Payment, or notice that no payment is due, shall be made to the applicant within 30 calendar days of receiving the request. Any amount due and not paid within 30 calendar days of receipt of the request shall be subject to interest charges at the rate of one percent per month, or a portion thereof.

(c) If payment due under paragraph (b) of this subsection is not paid within 120 days after the city or its designee receives the refund request, the applicant may file an action for recovery of the unpaid refund. In an action brought by a person under this paragraph, the court shall award to a prevailing applicant, in addition to the relief provided in this section, reasonable attorney fees and costs at trial and on appeal. If the city or its designee prevails, the court shall award reasonable attorney fees and costs at trial and on appeal if the court finds the petition to be frivolous.

(10) A city may not compel an applicant to waive the 120-day period set in subsection (1) of this section or to waive the provisions of subsection (8) of this section or ORS 197A.470 or 227.179 as a condition for taking any action on an application for a permit, limited land use decision or zone change except when such applications are filed concurrently and considered jointly with a plan amendment.

(11) The periods set forth in subsections (1) and (5) of this section and ORS 197A.470 may be extended by up to 90 additional days, if the applicant and the city agree that a dispute concerning the application will be mediated.

ATTORNEY FEES FOR NEEDED HOUSING CHALLENGES

SECTION 10. ORS 197.843 is amended to read:

197.843. (1) The Land Use Board of Appeals shall award attorney fees to**:**

(a) An applicant whose application is only for the development of affordable housing[*, as defined in ORS 197A.445, or publicly supported housing, as defined in ORS 456.250*], if the board [*affirms a quasi-judicial land use decision approving the application or*] reverses a quasi-judicial land use decision denying the application[.]**;**

(b) An applicant whose application is only for the development of housing and was approved by the local government, if the board affirms the decision; and

(c) The local government that approved a quasi-judicial land use decision described in paragraph (b) of this subsection.

(2) For housing other than affordable housing, the attorney fees specified in subsection (1)(b) and (c) of this section apply only within urban growth boundaries.

[*(2)*] **(3)** A party who was awarded attorney fees under this section or ORS 197.850 shall repay the fees plus any interest from the time of the judgment if the property upon which the fees are based is developed for a use other than [*affordable*] **the proposed** housing.

[*(3)*] **(4)** As used in this section:

[*(a) "Applicant" includes:*]

[*(A) An applicant with a funding reservation agreement with a public funder for the purpose of developing publicly supported housing;*]

[*(B) A housing authority, as defined in ORS 456.005;*]

[*(C) A qualified housing sponsor, as defined in ORS 456.548;*]

[*(D) A religious nonprofit corporation;*]

[*(E) A public benefit nonprofit corporation whose primary purpose is the development of affordable housing; and*]

[*(F) A local government that approved the application of an applicant described in this paragraph.*]

(a) "Affordable housing" means affordable housing, as defined in ORS 197A.445, or publicly supported housing, as defined in ORS 456.250.

(b) "Attorney fees" includes prelitigation legal expenses, including preparing **and processing** the application and supporting the application in local land use hearings or proceedings.

SECTION 11. Operative and applicable dates. (1) The amendments to ORS 197.843 by section 10 of this 2024 Act become operative on January 1, 2025.

(2) The amendments to ORS 197.843 by section 10 of this 2024 Act apply to decisions for which a notice of intent to appeal under ORS 197.830 is filed on or after January 1, 2025.

INFRASTRUCTURE SUPPORTING HOUSING PRODUCTION

SECTION 12. Sections 13 and 14 of this 2024 Act are added to and made a part of ORS chapter 285A.

SECTION 13. Capacity and support for infrastructure planning. The Oregon Business Development Department shall provide capacity and support for infrastructure planning to municipalities to enable them to plan and finance infrastructure for water, sewers and sanitation, stormwater and transportation consistent with opportunities to produce housing units at densities defined in section 55 (3)(a)(C) of this 2024 Act. "Capacity and support" includes assistance with local financing opportunities, state and federal grant navigation, writing, review and administration, resource sharing, regional collaboration support and technical support, including engineering and design assistance and other capacity or support as the department may designate by rule.

SECTION 14. Housing Infrastructure Support Fund. (1) The Housing Infrastructure Support Fund is established in the State Treasury, separate and distinct from the General Fund.

(2) The Housing Infrastructure Support Fund consists of moneys appropriated, allocated, deposited or transferred to the fund by the Legislative Assembly or otherwise.

(3) Interest earned by the fund shall be credited to the fund.

(4) Moneys in the fund are continuously appropriated to the Oregon Business Development Department to administer the fund and to implement section 13 of this 2024 Act.

SECTION 15. Sunset. (1) Sections 13 and 14 of this 2024 Act are repealed on January 2, 2030.

(2) Any unobligated moneys in the Housing Infrastructure Support Fund on January 2, 2030, must be transferred to the General Fund for general governmental purposes.

SECTION 16. Infrastructure recommendation and reporting. (1) On or before December 31, 2024, the Department of Land Conservation and Development, in consultation with the Housing and Community Services Department, the Oregon Business Development Department and other agencies that fund and support local infrastructure projects, shall submit a report to an appropriate interim committee of the Legislative Assembly in the manner provided in ORS 192.245 that includes a list of key considerations and metrics the Legislative Assembly could use to evaluate, screen and prioritize proposed local infrastructure projects that facilitate and support housing within an urban growth boundary.

(2) The Department of Land Conservation and Development shall facilitate an engagement process with local governments, tribal nations, the development community, housing advocates, conservation groups, property owners, community partners and other interested parties to inform the list of key considerations and metrics.

NOTE: Sections 17 through 23 were deleted by amendment. Subsequent sections were not renumbered.

HOUSING PROJECT REVOLVING LOANS

SECTION 24. As used in sections 24 to 35 of this 2024 Act:

(1) "Assessor," "tax collector" and "treasurer" mean the individual filling that county office so named or any county officer performing the functions of the office under another name.

(2) "County tax officers" and "tax officers" mean the assessor, tax collector and treasurer of a county.

(3) "Eligible costs" means the following costs associated with an eligible housing project:

(a) Infrastructure costs, including, but not limited to, system development charges;

(b) Predevelopment costs;

(c) Construction costs; and

(d) Land write-downs.

(4) "Eligible housing project" means a project to construct housing, or to convert a building from a nonresidential use to housing, that is:

(a) Affordable to households with low income or moderate income as those terms are defined in ORS 458.610;

(b) If for-sale property, a single-family dwelling, middle housing as defined in ORS 197A.420 or a multifamily dwelling that is affordable as described in paragraph (a) of this subsection continuously from initial sale for a period, to be established by the Housing and Community Services Department and the sponsoring jurisdiction, of not less than the term of the loan related to the for-sale property; or

(c) If rental property:

(A)(i) Middle housing as defined in ORS 197A.420;

(ii) A multifamily dwelling;

(iii) An accessory dwelling unit as defined in ORS 215.501; or

(iv) Any other form of affordable housing or moderate income housing; and

(B) Rented at a monthly rate that is affordable to households with an annual income not greater than 120 percent of the area median income, such affordability to be maintained for a period, to be established by the department and the sponsoring jurisdiction, of not less than the term of the loan related to the rental property.

(5) "Eligible housing project property" means the taxable real and personal property constituting the improvements of an eligible housing project.

(6) "Fee payer" means, for any property tax year, the person responsible for paying ad valorem property taxes on eligible housing project property to which a grant awarded under section 29 of this 2024 Act relates.

(7) "Fire district taxes" means property taxes levied by fire districts within whose territory all or a portion of eligible housing project property is located.

(8) "Nonexempt property" means property other than eligible housing project property in the tax account that includes eligible housing project property.

(9) "Nonexempt taxes" means the ad valorem property taxes assessed on nonexempt property.

(10) "Sponsoring jurisdiction" means:

(a)(A) A city with respect to eligible housing projects located within the city boundaries; or

(B) A county with respect to eligible housing projects located in urban unincorporated areas of the county; or

(b) The governing body of a city or county described in paragraph (a) of this subsection.

SECTION 25. (1)(a) A sponsoring jurisdiction may adopt by ordinance or resolution a program under which the sponsoring jurisdiction awards grants to developers for eligible costs.

(b) Before adopting the program, the sponsoring jurisdiction shall consult with the governing body of any city or county with territory inside the boundaries of the sponsoring jurisdiction.

(2) The ordinance or resolution shall set forth:

(a) The kinds of eligible housing projects for which a developer may seek a grant under the program; and

(b) Any eligibility requirements to be imposed on projects and developers in addition to those required under sections 24 to 35 of this 2024 Act.

(3) A grant award:

(a) Shall be in the amount determined under section 26 (3) of this 2024 Act; and

(b) May include reimbursement for eligible costs incurred for up to 12 months preceding the date on which the eligible housing project received local site approval.

(4) Eligible housing project property for which a developer receives a grant for eligible costs may not be granted any exemption, partial exemption or special assessment of ad valorem property taxes other than the exemption granted under section 30 of this 2024 Act.

(5) A sponsoring jurisdiction may amend an ordinance or resolution adopted pursuant to this section at any time. The amendments shall apply only to applications submitted under section 26 of this 2024 Act on or after the effective date of the ordinance or resolution.

SECTION 26. (1)(a) A sponsoring jurisdiction that adopts a grant program pursuant to section 25 of this 2024 Act shall prescribe an application process, including forms and deadlines, by which a developer may apply for a grant with respect to an eligible housing project.

(b) An application for a grant must include, at a minimum:

(A) A description of the eligible housing project;

(B) A detailed explanation of the affordability of the eligible housing project;

(C) An itemized description of the eligible costs for which the grant is sought;

(D) The proposed schedule for completion of the eligible housing project;

(E) A project pro forma demonstrating that the project would not be economically feasible but for receipt of the grant moneys; and

(F) Any other information, documentation or attestation that the sponsoring jurisdiction considers necessary or convenient for the application review process.

(c)(A) The project pro forma under paragraph (b)(E) of this subsection shall be on a form provided to the sponsoring jurisdiction by the Housing and Community Services Department and made available to grant applicants.

(B) The department may enter into an agreement with a third party to develop the project pro forma template.

(2)(a) The review of an application under this section shall be completed within 90 days following the receipt of the application by the sponsoring jurisdiction.

(b) Notwithstanding paragraph (a) of this subsection:

(A) The sponsoring jurisdiction may in its sole discretion extend the review process beyond 90 days if the volume of applications would make timely completion of the review process unlikely.

(B) The sponsoring jurisdiction may consult with a developer about the developer's application, and the developer, after the consultation, may amend the application on or before a deadline set by the sponsoring jurisdiction.

(3) The sponsoring jurisdiction shall:

(a) Review each application;

(b) Request that the county tax officers provide to the sponsoring jurisdiction the amounts determined under section 27 of this 2024 Act;

(c) Set the term of the loan that will fund the grant award for a period not to exceed the greater of:

(A) Ten years following July 1 of the first property tax year for which the completed eligible housing project property is estimated to be taken into account; or

(B) If agreed upon by the sponsoring jurisdiction and the department, the period required for the loan principal and fees to be repaid in full;

(d) Set the amount of the grant that may be awarded to the developer under section 29 (2) of this 2024 Act by multiplying the increment determined under section 27 (1)(c) of this 2024 Act by the term of the loan; and

(e)(A) Provisionally approve the application as submitted;

(B) Provisionally approve the application on terms other than those requested in the application; or

(C) Reject the application.

(4)(a) The sponsoring jurisdiction shall forward provisionally approved applications to the Housing and Community Services Department.

(b) The department shall review the provisionally approved applications for completeness, including, but not limited to, the completeness of the project pro forma submitted with the application under subsection (1)(b)(E) of this section and the amounts computed under section 27 (1) of this 2024 Act and notify the sponsoring jurisdiction of its determination.

(5)(a) If the department has determined that a provisionally approved application is incomplete, the sponsoring jurisdiction may:

(A) Consult with the applicant developer and reconsider the provisionally approved application after the applicant revises it; or

(B) Reject the provisionally approved application.

(b) If the department has determined that a provisionally approved application is complete, the approval shall be final.

(c) The sponsoring jurisdiction shall notify each applicant and the department of the final approval or rejection of an application and the amount of the grant award.

(d) The rejection of an application and the amount of a grant award may not be appealed, but a developer may reapply for a grant at any time within the applicable deadlines of the grant program for the same or another eligible housing project.

(6) Upon request by a sponsoring jurisdiction, the department may assist the sponsoring jurisdiction with, or perform on behalf of the sponsoring jurisdiction, any duty required under this section.

SECTION 27. (1) Upon request of the sponsoring jurisdiction under section 26 (3)(b) of this 2024 Act, the assessor of the county in which is located the eligible housing project to which an application being reviewed under section 26 of this 2024 Act relates shall:

(a) Using the last certified assessment roll for the property tax year in which the application is received under section 26 of this 2024 Act:

(A) Determine the amount of property taxes assessed against all tax accounts that include the eligible housing project property; and

(B) Subtract the amount of operating taxes as defined in ORS 310.055 and local option taxes as defined in ORS 310.202 levied by fire districts from the amount determined under subparagraph (A) of this paragraph.

(b) For the first property tax year for which the completed eligible housing project property is estimated to be taken into account:

(A) Determine the estimated amount of property taxes that will be assessed against all tax accounts that include the eligible housing project property; and

(B) Subtract the estimated amount of operating taxes and local option taxes levied by fire districts from the amount determined under subparagraph (A) of this paragraph.

(c) Determine the amount of the increment that results from subtracting the amount determined under subsection (1)(a) of this section from the amount determined under subsection (1)(b) of this section.

(2) As soon as practicable after determining amounts under this section, the county tax officers shall provide written notice to the sponsoring jurisdiction of the amounts.

SECTION 28. (1)(a) The Housing and Community Services Department shall develop a program to make loans to sponsoring jurisdictions to fund grants awarded under the sponsoring jurisdiction's grant program adopted pursuant to section 25 of this 2024 Act.

(b) The loans shall be interest free for the term set by the sponsoring jurisdiction under section 26 (3)(c) of this 2024 Act.

(2) For each application approved under section 26 (5)(b) of this 2024 Act, the Housing and Community Services Department shall:

(a) Enter into a loan agreement with the sponsoring jurisdiction for a payment in an amount equal to the total of:

(A) Loan proceeds in an amount equal to the grant award for the application set under section 26 (3)(d) of this 2024 Act; and

(B) The administrative costs set forth in subsection (3) of this section; and

(b) Pay to the sponsoring jurisdiction the total amount set forth in paragraph (a) of this subsection out of the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

(3) The administrative costs referred to in subsection (2)(a)(B) of this section are:

(a) An amount not greater than five percent of the loan proceeds to reimburse the sponsoring jurisdiction for the costs of administering the grant program, other than the costs of tax administration; and

(b) An amount equal to one percent of the loan proceeds to be transferred to the county in which the sponsoring jurisdiction is situated to reimburse the county for the costs of the tax administration of the grant program by the county tax officers.

(4) The Housing and Community Services Department may assign any and all loan amounts made under this section to the Department of Revenue for collection as provided in ORS 293.250.

(5) The Housing and Community Services Department may:

(a) Consult with the Oregon Business Development Department about any of the powers and duties conferred on the Housing and Community Services Department by sections 24 to 35 of this 2024 Act; and

(b) Adopt any rule it considers necessary or convenient for the administration of sections 24 to 35 of this 2024 Act by the Housing and Community Services Department.

SECTION 29. (1) Upon entering into a loan agreement with the Housing and Community Services Department under section 28 of this 2024 Act, a sponsoring jurisdiction shall offer a grant agreement to each developer whose application was approved under section 26 (5)(b) of this 2024 Act.

(2) The grant agreement shall:

(a) Include a grant award in the amount set under section 26 (3)(d) of this 2024 Act; and

(b) Contain terms that:

(A) Are required under sections 24 to 35 of this 2024 Act or the ordinance or resolution adopted by the sponsoring jurisdiction pursuant to section 25 of this 2024 Act.

(B) Do not conflict with sections 24 to 35 of this 2024 Act or the ordinance or resolution adopted by the sponsoring jurisdiction pursuant to section 25 of this 2024 Act.

(3) Upon entering into a grant agreement with a developer, a sponsoring jurisdiction shall adopt an ordinance or resolution setting forth the details of the eligible housing project that is the subject of the agreement, including but not limited to:

(a) A description of the eligible housing project;

(b) An itemized description of the eligible costs;

(c) The amount and terms of the grant award;

(d) Written notice that the eligible housing project property is exempt from property taxation in accordance with section 30 of this 2024 Act; and

(e) A statement declaring that the grant has been awarded in response to the housing needs of communities within the sponsoring jurisdiction.

(4) Unless otherwise specified in the grant agreement, as soon as practicable after the ordinance or resolution required under subsection (3) of this section becomes effective, the sponsoring jurisdiction shall distribute the loan proceeds received from the department under section 28 (2)(a)(A) of this 2024 Act to the developer as the grant moneys awarded under this section.

(5) The sponsoring jurisdiction shall forward to the tax officers of the county in which the eligible housing project is located a copy of the grant agreement, the ordinance or resolution and any other material the sponsoring jurisdiction considers necessary for the tax officers to perform their duties under sections 24 to 35 of this 2024 Act or the ordinance or resolution.

(6) Upon request, the department may assist the sponsoring jurisdiction with, or perform on behalf of the sponsoring jurisdiction, any duty required under this section.

SECTION 30. (1) Upon receipt of the copy of a grant agreement and ordinance or resolution from the sponsoring jurisdiction under section 29 (5) of this 2024 Act, the assessor of the county in which eligible housing project property is located shall:

(a) Exempt the eligible housing project property in accordance with this section;

(b) Assess and tax the nonexempt property in the tax account as other similar property is assessed and taxed; and

(c) Submit a written report to the sponsoring jurisdiction setting forth the assessor's estimate of the amount of:

(A) The real market value of the exempt eligible housing project property; and

(B) The property taxes on the exempt eligible housing project property that would have been collected if the property were not exempt.

(2)(a) The exemption shall first apply to the first property tax year that begins after completion of the eligible housing project to which the grant relates.

(b) The eligible housing project property shall be disqualified from the exemption on the earliest of:

(A) July 1 of the property tax year immediately succeeding the date on which the fee payment obligation under section 32 of this 2024 Act that relates to the eligible housing project is repaid in full;

(B) The date on which the annual fee imposed on the fee payer under section 32 of this 2024 Act becomes delinquent;

(C) The date on which foreclosure proceedings are commenced as provided by law for delinquent nonexempt taxes assessed with respect to the tax account that includes the eligible housing project; or

(D) The date on which a condition specified in section 33 (1) of this 2024 Act occurs.

(c) After the eligible housing project property has been disqualified from the exemption under this subsection, the property shall be assessed and taxed as other similar property is assessed and taxed.

(3) For each tax year that the eligible housing project property is exempt from taxation, the assessor shall enter a notation on the assessment roll stating:

(a) That the property is exempt under this section; and

(b) The presumptive number of property tax years for which the exemption is granted, which shall be the term of the loan agreement relating to the eligible housing project set under section 26 (3)(c) of this 2024 Act.

SECTION 31. (1) Repayment of loans made under section 28 of this 2024 Act shall begin, in accordance with section 32 of this 2024 Act, after completion of the eligible housing project funded by the grant to which the loan relates.

(2)(a) The sponsoring jurisdiction shall determine the date of completion of an eligible housing project.

(b)(A) If an eligible housing project is completed before July 1 of the assessment year, repayment shall begin with the property tax year that begins on July 1 of the assessment year.

(B) If an eligible housing project is completed on or after July 1 of the assessment year, repayment shall begin with the property tax year that begins on July 1 of the succeeding assessment year.

(c) After determining the date of completion under paragraph (a) of this subsection, the sponsoring jurisdiction shall notify the Housing and Community Services Department and the county tax officers of the determination.

(3) A loan shall remain outstanding until repaid in full.

SECTION 32. (1) The fee payer for eligible housing project property that has been granted exemption under section 30 of this 2024 Act shall pay an annual fee for the term that shall be the presumptive number of years for which the property is granted exemption under section 30 (3)(b) of this 2024 Act.

(2)(a) The amount of the fee for the first property tax year in which repayment of the loan is due under section 31 (1) of this 2024 Act shall equal the total of:

(A) The portion of the increment determined under section 27 (1)(c) of this 2024 Act that is attributable to the eligible housing project property to which the fee relates; and

(B) The administrative costs described in section 28 (3) of this 2024 Act divided by the term of the grant agreement entered into under section 29 of this 2024 Act.

(b) For each subsequent property tax year, the amount of the fee shall be 103 percent of the amount of the fee for the preceding property tax year.

(3)(a) Not later than July 15 of each property tax year during the term of the fee obligation, the sponsoring jurisdiction shall certify to the assessor each fee amount that became due under this section on or after July 16 of the previous property tax year from fee payers with respect to eligible housing projects located in the sponsoring jurisdiction.

(b) The assessor shall place each fee amount on the assessment and tax rolls of the county and notify:

(A) The sponsoring jurisdiction of each fee amount and the aggregate of all fee amounts imposed with respect to eligible housing project property located in the sponsoring jurisdiction.

(B) The Housing and Community Services Department of each fee amount and the aggregate of all fee amounts with respect to all eligible housing project property located in the county.

(4)(a) The assessor shall include on the tax statement of each tax account that includes exempt eligible housing project property the amount of the fee imposed on the fee payer with respect to the eligible housing project property.

(b) The fee shall be collected and enforced in the same manner as ad valorem property taxes, including nonexempt taxes, are collected and enforced.

(5)(a) For each property tax year in which a fee is payable under this section, the treasurer shall:

(A) Estimate the amount of operating taxes as defined in ORS 310.055 and local option taxes as defined in ORS 310.202 levied by fire districts that would have been collected on eligible housing project property if the property were not exempt;

(B) Distribute out of the fee moneys the amounts determined under subparagraph (A) of this paragraph to the respective fire districts when other ad valorem property taxes are distributed under ORS 311.395; and

(C) Transfer the net fee moneys to the Housing and Community Services Department for deposit in the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act in repayment of the loans to which the fees relate.

(b) Nonexempt taxes shall be distributed in the same manner as other ad valorem property taxes are distributed.

(6) Any person with an interest in the eligible housing project property on the date on which any fee amount becomes due shall be jointly and severally liable for payment of the fee amount.

(7) Any loan amounts that have not been repaid when the fee payer has discharged its obligations in full under this section remain the obligation of the sponsoring jurisdiction that obtained the loan from the department under section 28 of this 2024 Act.

(8) Any fee amounts collected in excess of the loan amount shall be distributed in the same manner as other ad valorem property taxes are distributed.

SECTION 33. (1)(a) A developer that received a grant award under section 29 of this 2024 Act shall become liable for immediate payment of any outstanding annual fee payments imposed under section 32 of this 2024 Act for the entire term of the fee if:

(A) The developer has not completed the eligible housing project within three years following the date on which the grant moneys were distributed to the developer;

(B) The eligible housing project changes substantially from the project for which the developer's application was approved such that the project would not have been eligible for the grant; or

(C) The developer has not complied with a requirement specified in the grant agreement.

(b) The sponsoring jurisdiction may, in its sole discretion, extend the date on which the eligible housing project must be completed.

(2) If the sponsoring jurisdiction discovers that a developer willfully made a false statement or misrepresentation or willfully failed to report a material fact to obtain a grant with respect to an eligible housing project, the sponsoring jurisdiction may impose on the developer a penalty not to exceed 20 percent of the amount of the grant so obtained, plus any applicable interest and fees associated with the costs of collection.

(3) Any amounts imposed under subsection (1) or (2) of this section shall be a lien on the eligible housing project property and the nonexempt property in the tax account.

(4) The sponsoring jurisdiction shall provide written notice of any amounts that become due under subsections (1) and (2) of this section to the county tax officers and the Housing and Community Services Department.

(5)(a) Any and all amounts required to be paid under this section shall be considered to be liquidated and delinquent, and the Housing and Community Services Department shall assign such amounts to the Department of Revenue for collection as provided in ORS 293.250.

(b) Amounts collected under this subsection shall be deposited, net of any collection charges, in the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

SECTION 34. (1) Not later than June 30 of each year in which a grant agreement entered into under section 29 of this 2024 Act is in effect, a developer that is party to the agreement shall submit a report to the sponsoring jurisdiction in which the eligible housing project is located that contains:

(a) The status of the construction or conversion of the eligible housing project property, including an estimate of the date of completion;

(b) An itemized description of the uses of the grant moneys; and

(c) Any information the sponsoring jurisdiction considers important for evaluating the eligible housing project and the developer's performance under the terms of the grant agreement.

(2) Not later than August 15 of each year, each sponsoring jurisdiction shall submit to the Housing and Community Services Department a report containing such information re-

lating to eligible housing projects within the sponsoring jurisdiction as the department requires.

(3)(a) Not later than November 15 of each year, the department shall submit, in the manner required under ORS 192.245, a report to the interim committees of the Legislative Assembly related to housing.

(b) The report shall set forth in detail:

(A) The information received from sponsoring jurisdictions under subsection (2) of this section;

(B) The status of the repayment of all outstanding loans made under section 28 of this 2024 Act and of the payment of all fees imposed under section 32 of this 2024 Act and all amounts imposed under section 33 of this 2024 Act; and

(C) The cumulative experience of the program developed and implemented under sections 24 to 35 of this 2024 Act.

(c) The report may include recommendations for legislation.

SECTION 35. (1) The Housing Project Revolving Loan Fund is established in the State Treasury, separate and distinct from the General Fund. Interest earned by the Housing Project Revolving Loan Fund shall be credited to the fund.

(2) Moneys in the fund may be invested as provided by ORS 293.701 to 293.857, and the earnings from the investments shall be credited to the fund.

(3) Moneys in the Housing Project Revolving Loan Fund shall consist of:

(a) Amounts appropriated or otherwise transferred or credited to the fund by the Legislative Assembly;

(b) Net fee moneys transferred under section 32 of this 2024 Act;

(c) Amounts deposited in the fund under section 33 of this 2024 Act;

(d) Interest and other earnings received on moneys in the fund; and

(e) Other moneys or proceeds of property from any public or private source that are transferred, donated or otherwise credited to the fund.

(4) Moneys in the Housing Project Revolving Loan Fund are continuously appropriated to the Housing and Community Services Department for the purpose of paying amounts determined under section 28 of this 2024 Act.

(5) Moneys in the Housing Project Revolving Loan Fund at the end of a biennium shall be retained in the fund and used for the purposes set forth in subsection (4) of this section.

SECTION 36. (1) The Housing and Community Services Department shall have developed and begun operating the loan program that the department is required to develop under section 28 of this 2024 Act, including regional trainings and outreach for jurisdictional partners, no later than June 30, 2025.

(2) In the first two years in which the loan program is operating, the department may not expend an amount in excess of two-thirds of the moneys appropriated to the department for the purpose under section 62 of this 2024 Act.

HOUSING LAND USE ADJUSTMENTS

SECTION 37. Sections 38 to 41 of this 2024 Act are added to and made a part of ORS chapter 197A.

SECTION 38. Mandatory adjustment to housing development standards. (1) As used in sections 38 to 41 of this 2024 Act:

(a) "Adjustment" means a deviation from an existing land use regulation.

(b) "Adjustment" does not include:

(A) A request to allow a use of property not otherwise permissible under applicable zoning requirements;

(B) Deviations from land use regulations or requirements related to accessibility, affordability, fire ingress or egress, safety, local tree codes, hazardous or contaminated site

clean-up, wildlife protection, or statewide land use planning goals relating to natural resources, natural hazards, the Willamette River Greenway, estuarine resources, coastal shorelands, beaches and dunes or ocean resources;

(C) A complete waiver of land use regulations or any changes beyond the explicitly requested and allowed adjustments; or

(D) Deviations to requirements related to the implementation of fire or building codes, federal or state air, water quality or surface, ground or stormwater requirements, or requirements of any federal, state or local law other than a land use regulation.

(2) Except as provided in section 39 of this 2024 Act, a local government shall grant a request for an adjustment in an application to develop housing as provided in this section. An application qualifies for an adjustment under this section only if the following conditions are met:

(a) The application is for a building permit or a quasi-judicial, limited or ministerial land use decision;

(b) The development is on lands zoned to allow for residential uses, including mixed-use residential;

(c) The residential development is for densities not less than those required under section 55 (3)(a)(C) of this 2024 Act;

(d) The development is within an urban growth boundary, not including lands that have not been annexed by a city;

(e) The development is of net new housing units in new construction projects, including:

(A) Single-family or multifamily;

(B) Mixed-use residential where at least 75 percent of the developed floor area will be used for residential uses;

(C) Manufactured dwelling parks;

(D) Accessory dwelling units; or

(E) Middle housing as defined in ORS 197A.420;

(f) The application requests not more than 10 distinct adjustments to development standards as provided in this section. A "distinct adjustment" means:

(A) An adjustment to one of the development standards listed in subsection (4) of this section where each discrete adjustment to a listed development standard that includes multiple component standards must be counted as an individual adjustment; or

(B) An adjustment to one of the development standards listed in subsection (5) of this section where each discrete adjustment to a listed development standard that includes multiple component standards must be counted as an individual adjustment; and

(g) The application states how at least one of the following criteria apply:

(A) The adjustments will enable development of housing that is not otherwise feasible due to cost or delay resulting from the unadjusted land use regulations;

(B) The adjustments will enable development of housing that reduces the sale or rental prices per residential unit;

(C) The adjustments will increase the number of housing units within the application;

(D) All of the units in the application are subject to an affordable housing covenant as described in ORS 456.270 to 456.295, making them affordable to moderate income households as defined in ORS 456.270 for a minimum of 30 years;

(E) At least 20 percent of the units in the application are subject to an affordable housing covenant as described in ORS 456.270 to 456.295, making them affordable to low income households as defined in ORS 456.270 for a minimum of 60 years;

(F) The adjustments will enable the provision of accessibility or visitability features in housing units that are not otherwise feasible due to cost or delay resulting from the unadjusted land use regulations; or

(G) All of the units in the application are subject to a zero equity, limited equity, or shared equity ownership model including resident-owned cooperatives and community land

trusts making them affordable to moderate income households as described in ORS 456.270 to 456.295 for a period of 90 years.

(3) A decision on an application for an adjustment made under this section is a limited land use decision. Only the applicant may appeal the decision. No notice of the decision is required if the application is denied, other than notice to the applicant. In implementing this subsection, a local government may:

(a) Use an existing process, or develop and apply a new process, that complies with the requirements of this subsection; or

(b) Directly apply the process set forth in this subsection.

(4) A local government shall grant an adjustment to the following development standards:

(a) Side or rear setbacks, for an adjustment of not more than 10 percent.

(b) For an individual development project, the common area, open space or area that must be landscaped on the same lot or parcel as the proposed housing, for a reduction of not more than 25 percent.

(c) Parking minimums.

(d) Minimum lot sizes, not more than a 10 percent adjustment, and including not more than a 10 percent adjustment to lot widths or depths.

(e) Maximum lot sizes, not more than a 10 percent adjustment, including not more than a 10 percent adjustment to lot width or depths and only if the adjustment results in:

(A) More dwelling units than would be allowed without the adjustment; and

(B) No reduction in density below the minimum applicable density.

(f) Building lot coverage requirements for up to a 10 percent adjustment.

(g) For manufactured dwelling parks, middle housing as defined in ORS 197A.420, multi-family housing and mixed-use residential housing:

(A) Requirements for bicycle parking that establish:

(i) The minimum number of spaces for use by the residents of the project, provided the application includes at least one-half space per residential unit; or

(ii) The location of the spaces, provided that lockable, covered bicycle parking spaces are within or adjacent to the residential development;

(B) For uses other than cottage clusters, as defined in ORS 197A.420 (1)(c)(D), building height maximums that:

(i) Are in addition to existing applicable height bonuses, if any; and

(ii) Are not more than an increase of the greater of:

(I) One story; or

(II) A 20 percent increase to base zone height with rounding consistent with methodology outlined in city code, if any;

(C) Unit density maximums, not more than an amount necessary to account for other adjustments under this section; and

(D) Prohibitions, for the ground floor of a mixed-use building, against:

(i) Residential uses except for one face of the building that faces the street and is within 20 feet of the street; and

(ii) Nonresidential active uses that support the residential uses of the building, including lobbies, day care, passenger loading, community rooms, exercise facilities, offices, activity spaces or live-work spaces, except for active uses in specifically and clearly defined mixed use areas or commercial corridors designated by local governments.

(5) A local government shall grant an adjustment to design standards that regulate:

(a) Facade materials, color or pattern.

(b) Facade articulation.

(c) Roof forms and materials.

(d) Entry and garage door materials.

(e) Garage door orientation, unless the building is adjacent to or across from a school or public park.

(f) Window materials, except for bird-safe glazing requirements.

(g) Total window area, for up to a 30 percent adjustment, provided the application includes at least 12 percent of the total facade as window area.

(h) For manufactured dwelling parks, middle housing as defined in ORS 197A.420, multifamily housing and mixed-use residential:

(A) Building orientation requirements, not including transit street orientation requirements.

(B) Building height transition requirements, not more than a 50 percent adjustment from the base zone.

(C) Requirements for balconies and porches.

(D) Requirements for recesses and offsets.

SECTION 39. Mandatory adjustments exemption process. (1) A local government may apply to the Housing Accountability and Production Office for an exemption to section 38 of this 2024 Act only as provided in this section. After the application is made, section 38 of this 2024 Act does not apply to the applicant until the office denies the application or revokes the exemption.

(2) To qualify for an exemption under this section, the local government must demonstrate that:

(a) The local government reviews requested design and development adjustments for all applications for the development of housing that are under the jurisdiction of that local government;

(b) All listed development and design adjustments under section 38 (4) and (5) of this 2024 Act are eligible for an adjustment under the local government's process; and

(c)(A) Within the previous 5 years the city has approved 90 percent of received adjustment requests; or

(B) The adjustment process is flexible and accommodates project needs as demonstrated by testimonials of housing developers who have utilized the adjustment process within the previous five years.

(3) Upon receipt of an application under this section, the office shall allow for public comment on the application for a period of no less than 45 days. The office shall enter a final order on the adjustment exemption within 120 days of receiving the application. The approval of an application may not be appealed.

(4) In approving an exemption, the office may establish conditions of approval requiring that the city demonstrate that it continues to meet the criteria under subsection (2) of this section.

(5) Local governments with an approved or pending exemption under this section shall clearly and consistently notify applicants, including prospective applicants seeking to request an adjustment, that are engaged in housing development:

(a) That the local government is employing a local process in lieu of section 38 of this 2024 Act;

(b) Of the development and design standards for which an applicant may request an adjustment in a housing development application; and

(c) Of the applicable criteria for the adjustment application.

(6) In response to a complaint and following an investigation, the office may issue an order revoking an exemption issued under this section if the office determines that the local government is:

(a) Not approving adjustments as required by the local process or the terms of the exemption;

(b) Engaging in a pattern or practice of violating housing-related statutes or implementing policies that create unreasonable cost or delays to housing production under ORS 197.320 (13)(a); or

(c) Failing to comply with conditions of approval adopted under subsection (4) of this section.

SECTION 40. Temporary exemption authority. Before January 1, 2025, notwithstanding section 39 of this 2024 Act:

(1) Cities may deliver applications for exemption under section 39 of this 2024 Act to the Department of Land Conservation and Development; and

(2) The Department of Land Conservation and Development may perform any action that the Housing Accountability and Production Office may take under section 39 of this 2024 Act. Decisions and actions of the department under this section are binding on the office.

SECTION 41. Reporting. (1) A city required to provide a report under ORS 197A.110 shall include as part of that report information reasonably requested from the Department of Land Conservation and Development on residential development produced through approvals of adjustments granted under section 38 of this 2024 Act. The department may not develop a separate process for collecting this data or otherwise place an undue burden on local governments.

(2) On or before September 15 of each even-numbered year, the department shall provide a report to an interim committee of the Legislative Assembly related to housing in the manner provided in ORS 192.245 on the data collected under subsection (1) of this section. The committee shall invite the League of Oregon Cities to provide feedback on the report and the efficacy of section 38 of this 2024 Act.

SECTION 42. Operative date. Sections 38 to 41 of this 2024 Act become operative on January 1, 2025.

SECTION 43. Sunset. Sections 38 to 41 of this 2024 Act are repealed on January 2, 2032.

LIMITED LAND USE DECISIONS

SECTION 44. ORS 197.015 is amended to read:

197.015. As used in ORS chapters 195, 196, 197 and 197A, unless the context requires otherwise:

(1) "Acknowledgment" means a commission order that certifies that a comprehensive plan and land use regulations, land use regulation or plan or regulation amendment complies with the goals or certifies that Metro land use planning goals and objectives, Metro regional framework plan, amendments to Metro planning goals and objectives or amendments to the Metro regional framework plan comply with the goals.

(2) "Board" means the Land Use Board of Appeals.

(3) "Carport" means a stationary structure consisting of a roof with its supports and not more than one wall, or storage cabinet substituting for a wall, and used for sheltering a motor vehicle.

(4) "Commission" means the Land Conservation and Development Commission.

(5) "Comprehensive plan" means a generalized, coordinated land use map and policy statement of the governing body of a local government that interrelates all functional and natural systems and activities relating to the use of lands, including but not limited to sewer and water systems, transportation systems, educational facilities, recreational facilities, and natural resources and air and water quality management programs. "Comprehensive" means all-inclusive, both in terms of the geographic area covered and functional and natural activities and systems occurring in the area covered by the plan. "General nature" means a summary of policies and proposals in broad categories and does not necessarily indicate specific locations of any area, activity or use. A plan is "coordinated" when the needs of all levels of governments, semipublic and private agencies and the citizens of Oregon have been considered and accommodated as much as possible. "Land" includes water, both surface and subsurface, and the air.

(6) "Department" means the Department of Land Conservation and Development.

(7) "Director" means the Director of the Department of Land Conservation and Development.

(8) "Goals" means the mandatory statewide land use planning standards adopted by the commission pursuant to ORS chapters 195, 196, 197 and 197A.

(9) "Guidelines" means suggested approaches designed to aid cities and counties in preparation, adoption and implementation of comprehensive plans in compliance with goals and to aid state agencies and special districts in the preparation, adoption and implementation of plans, programs and regulations in compliance with goals. Guidelines are advisory and do not limit state agencies, cities, counties and special districts to a single approach.

(10) "Land use decision":

(a) Includes:

(A) A final decision or determination made by a local government or special district that concerns the adoption, amendment or application of:

(i) The goals;

(ii) A comprehensive plan provision;

(iii) A land use regulation; or

(iv) A new land use regulation;

(B) A final decision or determination of a state agency other than the commission with respect to which the agency is required to apply the goals; or

(C) A decision of a county planning commission made under ORS 433.763;

(b) Does not include a decision of a local government:

(A) That is made under land use standards that do not require interpretation or the exercise of policy or legal judgment;

(B) That approves or denies a building permit issued under clear and objective land use standards;

(C) That is a limited land use decision;

(D) That determines final engineering design, construction, operation, maintenance, repair or preservation of a transportation facility that is otherwise authorized by and consistent with the comprehensive plan and land use regulations;

(E) That is an expedited land division as described in ORS 197.360;

(F) That approves, pursuant to ORS 480.450 (7), the siting, installation, maintenance or removal of a liquefied petroleum gas container or receptacle regulated exclusively by the State Fire Marshal under ORS 480.410 to 480.460;

(G) That approves or denies approval of a final subdivision or partition plat or that determines whether a final subdivision or partition plat substantially conforms to the tentative subdivision or partition plan; or

(H) That a proposed state agency action subject to ORS 197.180 (1) is compatible with the acknowledged comprehensive plan and land use regulations implementing the plan, if:

(i) The local government has already made a land use decision authorizing a use or activity that encompasses the proposed state agency action;

(ii) The use or activity that would be authorized, funded or undertaken by the proposed state agency action is allowed without review under the acknowledged comprehensive plan and land use regulations implementing the plan; or

(iii) The use or activity that would be authorized, funded or undertaken by the proposed state agency action requires a future land use review under the acknowledged comprehensive plan and land use regulations implementing the plan;

(c) Does not include a decision by a school district to close a school;

(d) Does not include, except as provided in ORS 215.213 (13)(c) or 215.283 (6)(c), authorization of an outdoor mass gathering as defined in ORS 433.735, or other gathering of fewer than 3,000 persons that is not anticipated to continue for more than 120 hours in any three-month period; and

(e) Does not include:

(A) A writ of mandamus issued by a circuit court in accordance with ORS 215.429 or 227.179;

(B) Any local decision or action taken on an application subject to ORS 215.427 or 227.178 after a petition for a writ of mandamus has been filed under ORS 215.429 or 227.179; or

(C) A state agency action subject to ORS 197.180 (1), if:

(i) The local government with land use jurisdiction over a use or activity that would be authorized, funded or undertaken by the state agency as a result of the state agency action has already made a land use decision approving the use or activity; or

(ii) A use or activity that would be authorized, funded or undertaken by the state agency as a result of the state agency action is allowed without review under the acknowledged comprehensive plan and land use regulations implementing the plan.

(11) "Land use regulation" means any local government zoning ordinance, land division ordinance adopted under ORS 92.044 or 92.046 or similar general ordinance establishing standards for implementing a comprehensive plan.

(12)**(a)** "Limited land use decision"[*:*]

[*(a)*] means a final decision or determination made by a local government pertaining to a site within an urban growth boundary that concerns:

(A) The approval or denial of a tentative subdivision or partition plan, as described in ORS 92.040 (1).

(B) The approval or denial of an application based on discretionary standards designed to regulate the physical characteristics of a use permitted outright, including but not limited to site review and design review.

(C) The approval or denial of an application for a replat.

(D) The approval or denial of an application for a property line adjustment.

(E) The approval or denial of an application for an extension, alteration or expansion of a nonconforming use.

(b) **"Limited land use decision"** does not mean a final decision made by a local government pertaining to a site within an urban growth boundary that concerns approval or denial of a final subdivision or partition plat or that determines whether a final subdivision or partition plat substantially conforms to the tentative subdivision or partition plan.

(13) "Local government" means any city, county or Metro or an association of local governments performing land use planning functions under ORS 195.025.

(14) "Metro" means a metropolitan service district organized under ORS chapter 268.

(15) "Metro planning goals and objectives" means the land use goals and objectives that Metro may adopt under ORS 268.380 (1)(a). The goals and objectives do not constitute a comprehensive plan.

(16) "Metro regional framework plan" means the regional framework plan required by the 1992 Metro Charter or its separate components. Neither the regional framework plan nor its individual components constitute a comprehensive plan.

(17) "New land use regulation" means a land use regulation other than an amendment to an acknowledged land use regulation adopted by a local government that already has a comprehensive plan and land regulations acknowledged under ORS 197.251.

(18) "Person" means any individual, partnership, corporation, association, governmental subdivision or agency or public or private organization of any kind. The Land Conservation and Development Commission or its designee is considered a person for purposes of appeal under ORS chapters 195, 197 and 197A.

(19) "Special district" means any unit of local government, other than a city, county, Metro or an association of local governments performing land use planning functions under ORS 195.025, authorized and regulated by statute and includes but is not limited to water control districts, domestic water associations and water cooperatives, irrigation districts, port districts, regional air quality control authorities, fire districts, school districts, hospital districts, mass transit districts and sanitary districts.

(20) "Urban growth boundary" means an acknowledged urban growth boundary contained in a city or county comprehensive plan or adopted by Metro under ORS 268.390 (3).

(21) "Urban unincorporated community" means an area designated in a county's acknowledged comprehensive plan as an urban unincorporated community after December 5, 1994.

(22) "Voluntary association of local governments" means a regional planning agency in this state officially designated by the Governor pursuant to the federal Office of Management and Budget Circular A-95 as a regional clearinghouse.

(23) "Wetlands" means those areas that are inundated or saturated by surface or ground water at a frequency and duration that are sufficient to support, and that under normal circumstances do support, a prevalence of vegetation typically adapted for life in saturated soil conditions.

SECTION 45. ORS 197.195 is amended to read:

197.195. (1) A limited land use decision shall be consistent with applicable provisions of city or county comprehensive plans and land use regulations. Such a decision may include conditions authorized by law. Within two years of September 29, 1991, cities and counties shall incorporate all comprehensive plan standards applicable to limited land use decisions into their land use regulations. A decision to incorporate all, some, or none of the applicable comprehensive plan standards into land use regulations shall be undertaken as a post-acknowledgment amendment under ORS 197.610 to 197.625. If a city or county does not incorporate its comprehensive plan provisions into its land use regulations, the comprehensive plan provisions may not be used as a basis for a decision by the city or county or on appeal from that decision.

(2) A limited land use decision is not subject to the requirements of ORS 197.797.

(3) A limited land use decision is subject to the requirements of paragraphs (a) to (c) of this subsection.

(a) In making a limited land use decision, the local government shall follow the applicable procedures contained within its acknowledged comprehensive plan and land use regulations and other applicable legal requirements.

(b) For limited land use decisions, the local government shall provide written notice to owners of property within 100 feet of the entire contiguous site for which the application is made. The list shall be compiled from the most recent property tax assessment roll. For purposes of review, this requirement shall be deemed met when the local government can provide an affidavit or other certification that such notice was given. Notice shall also be provided to any neighborhood or community organization recognized by the governing body and whose boundaries include the site.

(c) The notice and procedures used by local government shall:

(A) Provide a 14-day period for submission of written comments prior to the decision;

(B) State that issues which may provide the basis for an appeal to the Land Use Board of Appeals shall be raised in writing prior to the expiration of the comment period. Issues shall be raised with sufficient specificity to enable the decision maker to respond to the issue;

(C) List, by commonly used citation, the applicable criteria for the decision;

(D) Set forth the street address or other easily understood geographical reference to the subject property;

(E) State the place, date and time that comments are due;

(F) State that copies of all evidence relied upon by the applicant are available for review, and that copies can be obtained at cost;

(G) Include the name and phone number of a local government contact person;

(H) Provide notice of the decision to the applicant and any person who submits comments under subparagraph (A) of this paragraph. The notice of decision must include an explanation of appeal rights; and

(I) Briefly summarize the local decision making process for the limited land use decision being made.

(4) Approval or denial of a limited land use decision shall be based upon and accompanied by a brief statement that explains the criteria and standards considered relevant to the decision, states the facts relied upon in rendering the decision and explains the justification for the decision based on the criteria, standards and facts set forth.

(5) A local government may provide for a hearing before the local government on appeal of a limited land use decision under this section. The hearing may be limited to the record developed pursuant to the initial hearing under subsection (3) of this section or may allow for the introduction

of additional testimony or evidence. A hearing on appeal that allows the introduction of additional testimony or evidence shall comply with the requirements of ORS 197.797. Written notice of the decision rendered on appeal shall be given to all parties who appeared, either orally or in writing, before the hearing. The notice of decision shall include an explanation of the rights of each party to appeal the decision.

(6) A city shall apply the procedures in this section, and only the procedures in this section, to a limited land use decision, even if the city has not incorporated limited land use decisions into land use regulations, as required by ORS 197.646 (3), except that a limited land use decision that is made under land use standards that do not require interpretation or the exercise of policy or legal judgment may be made by city staff using a ministerial process.

SECTION 45a. Section 46 of this 2024 Act is added to and made a part of ORS chapter 197.

SECTION 46. Applicability of limited land use decision to housing development. (1) The Housing Accountability and Production Office may approve a hardship exemption or time extension to ORS 197.195 (6), during which time ORS 197.195 (6) does not apply to decisions by a local government.

(2) The office may grant an exemption or time extension only if the local government demonstrates that a substantial hardship would result from the increased costs or staff capacity needed to implement procedures as required under ORS 197.195 (6).

(3) The office shall review exemption or time extension requests under the deadlines provided in section 39 (3) of this 2024 Act.

SECTION 47. Sunset. Section 46 of this 2024 Act is repealed on January 2, 2032.

SECTION 47a. Operative date. Section 46 of this 2024 Act and the amendments to ORS 197.015 and 197.195 by sections 44 and 45 of this 2024 Act become operative on January 1, 2025.

ONE-TIME SITE ADDITIONS TO URBAN GROWTH BOUNDARIES

SECTION 48. Sections 49 to 59 of this 2024 Act are added to and made a part of ORS chapter 197A.

SECTION 49. Definitions. As used in sections 49 to 59 of this 2024 Act:

(1) "Net residential acre" means an acre of residentially designated buildable land, not including rights of way for streets, roads or utilities or areas not designated for development due to natural resource protections or environmental constraints.

(2) "Site" means a lot or parcel or contiguous lots or parcels, or both, with or without common ownership.

SECTION 50. City addition of sites outside of Metro. (1) Notwithstanding any other provision of ORS chapter 197A, a city outside of Metro may add a site to the city's urban growth boundary under sections 49 to 59 of this 2024 Act, if:

(a) The site is adjacent to the existing urban growth boundary of the city or is separated from the existing urban growth boundary by only a street or road;

(b) The site is:

(A) Designated as an urban reserve under ORS 197A.230 to 197A.250, including a site whose designation is adopted under ORS 197.652 to 197.658;

(B) Designated as nonresource land; or

(C) Subject to an acknowledged exception to a statewide land use planning goal relating to farmland or forestland;

(c) The city has not previously adopted an urban growth boundary amendment or exchange under sections 49 to 59 of this 2024 Act;

(d) The city has demonstrated a need for the addition under section 52 of this 2024 Act;

(e) The city has requested and received an application as required under sections 53 and 54 of this 2024 Act;

(f) The total acreage of the site:

(A) For a city with a population of 25,000 or greater, does not exceed 100 net residential acres; or

(B) For a city with a population of less than 25,000, does not exceed 50 net residential acres; and

(g)(A) The city has adopted a binding conceptual plan for the site that satisfies the requirements of section 55 of this 2024 Act; or

(B) The added site does not exceed 15 net residential acres and satisfies the requirements of section 56 of this 2024 Act.

(2) A county shall approve an amendment to an urban growth boundary made under this section that complies with sections 49 to 59 of this 2024 Act and shall cooperate with a city to facilitate the coordination of functions under ORS 195.020 to facilitate the city's annexation and the development of the site. The county's decision is not a land use decision.

(3) Notwithstanding ORS 197.626, an action by a local government under sections 49 to 59 of this 2024 Act is not a land use decision as defined in ORS 197.015.

SECTION 51. Petition for additions of sites to Metro urban growth boundary. (1) A city within Metro may petition Metro to add a site within the Metro urban growth boundary if the site:

(a) Satisfies the requirements of section 50 (1) of this 2024 Act; and

(b) Is designated as an urban reserve.

(2)(a) Within 120 days of receiving a petition under this section, Metro shall determine whether the site would substantially comply with the applicable provisions of sections 49 to 59 of this 2024 Act.

(b) If Metro determines that a petition does not substantially comply, Metro shall:

(A) Notify the city of deficiencies in the petition, specifying sufficient detail to allow the city to remedy any deficiency in a subsequent resubmittal; and

(B) Allow the city to amend its conceptual plan and resubmit it as a petition to Metro under this section.

(c) If Metro determines that a petition does comply, notwithstanding any other provision of ORS chapter 197A, Metro shall adopt amendments to its urban growth boundary to include the site in the petition, unless the amendment would result in more than 300 total net residential acres added under this subsection.

(3) If the net residential acres included in petitions that Metro determines are in compliance on or before July 1, 2025, total less than 300 net residential acres, Metro shall adopt amendments to its urban growth boundary under subsection (2)(c) of this section:

(a) On or before November 1, 2025, for all petitions deemed compliant on or before July 1, 2025; or

(b) Within 120 days after a petition is deemed compliant after July 1, 2025, in the order in which the petitions are received.

(4) If the net residential acres included in petitions that Metro determines are in compliance on or before July 1, 2025, total 300 or more net residential acres, on or before January 1, 2027, Metro shall adopt amendments to its urban growth boundary under subsection (2)(c) of this section to include the sites in those petitions that Metro determines will:

(a) Best comply with the provisions of section 55 of this 2024 Act; and

(b) Maximize the development of needed housing.

(5) Metro may not conduct a hearing to review or select petitions or adopt amendments to its urban growth boundary under this section.

SECTION 52. City demonstration of need. A city may not add, or petition to add, a site under sections 49 to 59 of this 2024 Act, unless:

(1) The city has demonstrated a need for additional land based on the following factors:

(a)(A) In the previous 20 years there have been no urban growth boundary expansions for residential use adopted by a city or by Metro in a location adjacent to the city; and

(B) The city does not have within the existing urban growth boundary an undeveloped, contiguous tract that is zoned for residential use that is larger than 20 net residential acres; or

(b) Within urban growth boundary expansion areas for residential use adopted by the city over the previous 20 years, or by Metro in locations adjacent to the city, 75 percent of the lands either:

(A) Are developed; or

(B) Have an acknowledged comprehensive plan with land use designations in preparation for annexation and have a public facilities plan and associated financing plan.

(2) The city has demonstrated a need for affordable housing, based on:

(a) Having a greater percentage of severely cost-burdened households than the average for this state based on the Comprehensive Housing Affordability Strategy data from the United States Department of Housing and Urban Development; or

(b) At least 25 percent of the renter households in the city being severely rent burdened as indicated under the most recent housing equity indicator data under ORS 456.602 (2)(g).

SECTION 53. City solicitation of site applications. (1) Before a city may select a site for inclusion within the city's or Metro's urban growth boundary under sections 49 to 59 of this 2024 Act, a city must provide public notice that includes:

(a) The city's intention to select a site for inclusion within the city's urban growth boundary.

(b) Each basis under which the city has determined that it qualifies to include a site under section 52 of this section.

(c) A deadline for submission of applications under this section that is at least 45 days following the date of the notice.

(d) A description of the information, form and format required of an application, including the requirements of section 55 (2) of this 2024 Act.

(2) A copy of the notice of intent under this section must be provided to:

(a) Each county in which the city resides;

(b) Each special district providing urban services within the city's urban growth boundary;

(c) The Department of Land Conservation and Development; and

(d) Metro, if the city is within Metro.

SECTION 54. City review of site applications. (1) After the deadline for submission of applications established under section 55 of this 2024 Act, the city shall:

(a) Review applications filed for compliance with sections 49 to 59 of this 2024 Act.

(b) For each completed application that complies with sections 49 to 59 of this 2024 Act, provide notice to the residents of the proposed site area who were not signatories to the application.

(c) Provide opportunities for public participation in selecting a site, including, at least:

(A) One public comment period;

(B)(i) One meeting of the city's planning commission at which public testimony is considered;

(ii) One meeting of the city's council at which public testimony is considered; or

(iii) One public open house; and

(C) Notice on the city's website or published in a paper of record at least 14 days before:

(i) A meeting under subparagraph (B) of this paragraph; and

(ii) The beginning of a comment period under subparagraph (A) of this paragraph.

(d) Consult with, request necessary information from and provide the opportunity for written comment from:

(A) The owners of each lot or parcel within the site;

(B) If the city does not currently exercise land use jurisdiction over the entire site, the governing body of each county with land use jurisdiction over the site;

(C) Any special district that provides urban services to the site; and

(D) Any public or private utility that provides utilities to the site.

(2) An application filed under this section must:

(a) Be completed for each property owner or group of property owners that are proposing an urban growth boundary amendment under sections 49 to 59 of this 2024 Act;

(b) Be in writing in a form and format as required by the city;

(c) Specify the lots or parcels that are the subject of the application;

(d) Be signed by all owners of lots or parcels included within the application; and

(e) Include each owner's signed consent to annexation of the properties if the site is added to the urban growth boundary.

(3) If the city has received approval from all property owners of such lands, in writing in a form and format specified by the city, the governing body of the city may select an application and the city shall adopt a conceptual plan as described in section 55 of this 2024 Act for all or a portion of the lands contained within the application.

(4) A conceptual plan adopted under subsection (3) of this section must include findings identifying reasons for inclusion of lands within the conceptual plan and reasons why lands, if any, submitted as part of an application that was partially approved were not included within the conceptual plan.

SECTION 55. Conceptual plan for added sites. (1) As used in this section:

(a) "Affordable units" means residential units described in subsection (3)(f)(A) or (4) of this section.

(b) "Market rate units" means residential units other than affordable units.

(2) Before adopting an urban growth boundary amendment under section 50 of this 2024 Act or petitioning Metro under section 51 of this 2024 Act, for a site larger than 15 net residential acres, a city shall adopt a binding conceptual plan as an amendment to its comprehensive plan.

(3) The conceptual plan must:

(a) Establish the total net residential acres within the site and must require for those residential areas:

(A) A diversity of housing types and sizes, including middle housing, accessible housing and other needed housing;

(B) That the development will be on lands zoned for residential or mixed-use residential uses; and

(C) The development will be built at net residential densities not less than:

(i) Seventeen dwelling units per net residential acre if sited within the Metro urban growth boundary;

(ii) Ten units per net residential acre if sited in a city with a population of 30,000 or greater;

(iii) Six units per net residential acre if sited in a city with a population of 2,500 or greater and less than 30,000; or

(iv) Five units per net residential acre if sited in a city with a population less than 2,500;

(b) Designate within the site:

(A) Recreation and open space lands; and

(B) Lands for commercial uses, either separate or as a mixed use, that:

(i) Primarily serve the immediate surrounding housing;

(ii) Provide goods and services at a smaller scale than provided on typical lands zoned for commercial use; and

(iii) Are provided at the minimum amount necessary to support and integrate viable commercial and residential uses;

(c) If the city has a population of 5,000 or greater, include a transportation network for the site that provides diverse transportation options, including walking, bicycling and transit use if public transit services are available, as well as sufficient connectivity to existing and

planned transportation network facilities as shown in the local government's transportation system plan as defined in Land Conservation and Development Commission rules;

(d) Demonstrate that protective measures will be applied to the site consistent with the statewide land use planning goals for:

(A) Open spaces, scenic and historic areas or natural resources;

(B) Air, water and land resources quality;

(C) Areas subject to natural hazards;

(D) The Willamette River Greenway;

(E) Estuarine resources;

(F) Coast shorelands; or

(G) Beaches and dunes;

(e) Include a binding agreement among the city, each owner within the site and any other necessary public or private utility provider, local government or district, as defined in ORS 195.060, or combination of local governments and districts that the site will be served with all necessary urban services as defined in ORS 195.065, or an equivalent assurance; and

(f) Include requirements that ensure that:

(A) At least 30 percent of the residential units are subject to affordability restrictions, including but not limited to affordable housing covenants, as described in ORS 456.270 to 456.295, that require for a period of not less than 60 years that the units be:

(i) Available for rent, with or without government assistance, by households with an income of 80 percent or less of the area median income as defined in ORS 456.270; or

(ii) Available for purchase, with or without government assistance, by households with an income of 130 percent or less of the area median income;

(B) The construction of all affordable units has commenced before the city issues certificates of occupancy to the last 15 percent of market rate units;

(C) All common areas and amenities are equally available to residents of affordable units and of market rate units and properties designated for affordable units are dispersed throughout the site; and

(D) The requirement for affordable housing units is recorded before the building permits are issued for any property within the site, and the requirements contain financial penalties for noncompliance.

(4) A city may require greater affordability requirements for residential units than are required under subsection (3)(f)(A) of this section, provided that the city significantly and proportionally offsets development costs related to:

(a) Permits or fees;

(b) System development charges;

(c) Property taxes; or

(d) Land acquisition and predevelopment costs.

SECTION 56. Alternative for small additions. (1) A city that intends to add 15 net residential acres or less is not required to adopt a conceptual plan under section 55 of this 2024 Act if the city has entered into:

(a) Enforceable and recordable agreements with each landowner of a property within the site to ensure that the site will comply with the affordability requirements described in section 55 (3)(f) of this 2024 Act; and

(b) A binding agreement with each owner within the site and any other necessary public or private utility provider, local government or district, as defined in ORS 195.060, or combination of local governments and districts to ensure that the site will be served with all necessary urban services as defined in ORS 195.065.

(2) This section does not apply to a city within Metro.

SECTION 57. Department approval of site additions. (1) Within 21 days after the adoption of an amendment to an urban growth boundary or the adoption or amendment of a conceptual plan under sections 49 to 59 of this 2024 Act, and the approval by a county if required

under section 50 (2) of this 2024 Act, the conceptual plan or amendment must be submitted to the Department of Land Conservation and Development for review. The submission must be made by:

(a) The city, for an amendment under section 50 or 58 of this 2024 Act; or

(b) Metro, for an amendment under section 51 or 58 of this 2024 Act.

(2) Within 60 days after receiving a submittal under subsection (1) of this section, the department shall:

(a) Review the submittal for compliance with the provisions of sections 49 to 59 of this 2024 Act.

(b)(A) If the submittal substantially complies with the provisions of sections 49 to 59 of this 2024 Act, issue an order approving the submittal; or

(B) If the submittal does not substantially comply with the provisions of sections 49 to 59 of this 2024 Act, issue an order remanding the submittal to the city or to Metro with a specific determination of deficiencies in the submittal and with sufficient detail to identify a specific remedy for any deficiency in a subsequent resubmittal.

(3) If a conceptual plan is remanded to Metro under subsection (2)(b) of this section:

(a) The department shall notify the city; and

(b) The city may amend its conceptual plan and resubmit a petition to Metro under section 51 of this 2024 Act.

(4) Judicial review of the department's order:

(a) Must be as a review of orders other than a contested case under ORS 183.484; and

(b) May be initiated only by the city or an owner of a proposed site.

(5) Following the approval of a submittal under this section, a local government must include the added lands in any future inventory of buildable lands or determination of housing capacity under ORS 197A.270, 197A.280, 197A.335 or 197A.350.

SECTION 58. Alternative urban growth boundary land exchange. (1) In lieu of amending its urban growth boundary under any other process provided by sections 49 to 59 of this 2024 Act, Metro or a city outside of Metro may amend its urban growth boundary to add one or more sites described in section 51 (1)(a) and (b) of this 2024 Act to the urban growth boundary and to remove one or more tracts of land from the urban growth boundary as provided in this section.

(2) The acreage of the added site and removed lands must be roughly equivalent.

(3) The removed lands must have been zoned for residential uses.

(4) The added site must be zoned for residential uses at the same or greater density than the removed lands.

(5)(a) Except as provided in paragraph (b) of this subsection, land may be removed from an urban growth boundary under this section without landowner consent.

(b) A landowner may not appeal the removal of the landowner's land from an urban growth boundary under this section unless the landowner agrees to enter into a recorded agreement with Metro or the city in which the landowner would consent to annexation and development of the land within 20 years if the land remains in the urban growth boundary.

(6) Review of an exchange of lands made under this section may only be made by:

(a) For cities outside of Metro, the county as provided in section 50 (2) of this 2024 Act and by the Department of Land Conservation and Development, subject to judicial review, as provided in section 57 of this 2024 Act; or

(b) For Metro, the Department of Land Conservation and Development, subject to judicial review, as provided in section 57 of this 2024 Act.

(7) Sections 50 (1)(d) to (g), 52, 53, 54, 55 and 56 of this 2024 Act do not apply to a site addition made under this section.

SECTION 59. Reporting on added sites. A city for which an amendment was made to an urban growth boundary and approved under sections 49 to 59 of this 2024 Act shall submit a

report describing the status of development within the included area to the Department of Land Conservation and Development every two years until:

(1) January 2, 2033; or

(2) The city determines that development consistent with the acknowledged conceptual plan is deemed complete.

SECTION 60. Sunset. Sections 49 to 59 of this 2024 Act are repealed on January 2, 2033.

APPROPRIATIONS

SECTION 61. Appropriation and expenditure limitation to Department of Land Conservation and Development. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Department of Land Conservation and Development, for the biennium ending June 30, 2025, out of the General Fund, the amount of $5,629,017, for deposit into the Housing Accountability and Production Office Fund, established under section 4 of this 2024 Act, to take any action to implement sections 1 to 5, 16, 38 to 41, 46 and 49 to 59 of this 2024 Act and the amendments to ORS 183.471, 197.015, 197.195, 197.335, 215.427 and 227.178 by sections 8, 9, 44, 45, 64 and 65 of this 2024 Act.

(2) In addition to and not in lieu of any other appropriation, there is appropriated to the Department of Land Conservation and Development, for the biennium ending June 30, 2025, out of the General Fund, the amount of $5,000,000, for deposit into the Housing Accountability and Production Office Fund, established under section 4 of this 2024 Act, for the Housing Accountability and Production Office, established under section 1 of this 2024 Act, to provide technical assistance, including grants, under section 1 (2) of this 2024 Act and to provide required studies under section 5 of this 2024 Act.

(3) Notwithstanding any other law limiting expenditures, the amount of $10,629,017 is established for the biennium ending June 30, 2025, as the maximum amount for payment of expenses by the Department of Land Conservation and Development from the Housing Accountability and Production Office Fund established under section 4 of this 2024 Act.

SECTION 62. Appropriation and expenditure limitation to Housing and Community Services Department. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Housing and Community Services Department, for the biennium ending June 30, 2025, out of the General Fund, the amount of $75,000,000, for deposit into the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

(2) Notwithstanding any other provision of law, the General Fund appropriation made to the Housing and Community Services Department by section 1, chapter 390, Oregon Laws 2023, for the biennium ending June 30, 2025, is increased by $878,071 for administrative expenses related to the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

(3) Notwithstanding any other law limiting expenditures, the amount of $24,750,000 is established for the biennium ending June 30, 2025, as the maximum amount for payment of expenses by the Housing and Community Services Department from the Housing Project Revolving Loan Fund established under section 35 of this 2024 Act.

SECTION 63. Appropriation and expenditure limitation to Oregon Business Development Department. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Oregon Business Development Department, for the biennium ending June 30, 2025, out of the General Fund, the amount of $3,000,000, for deposit into the Housing Infrastructure Support Fund established under section 14 of this 2024 Act.

(2) Notwithstanding any other law limiting expenditures, the amount of $3,000,000 is established for the biennium ending June 30, 2025, as the maximum amount for payment of expenses by the Oregon Business Development Department from the Housing Infrastructure Support Fund established under section 14 of this 2024 Act.

SECTION 63a. Expenditure limitation to Department of Consumer and Business Services. Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 1 (6), chapter 354, Oregon Laws 2023, for the biennium ending June 30, 2025, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Department of Consumer and Business Services, for Building Codes Division, is increased by $296,944, to support operations of the Housing Accountability and Production Office established under section 1 of this 2024 Act.

CONFORMING AMENDMENTS

SECTION 64. ORS 197.335, as amended by section 17, chapter 13, Oregon Laws 2023, is amended to read:

197.335. (1) [*An order issued under ORS 197.328 and the copy of the order mailed*] **The Land Conservation and Development Commission shall mail a copy of an enforcement order** to the local government, state agency or special district**. An order** must set forth:

(a) The nature of the noncompliance, including, but not limited to, the contents of the comprehensive plan or land use regulation, if any, of a local government that do not comply with the goals or the contents of a plan, program or regulation affecting land use adopted by a state agency or special district that do not comply with the goals. In the case of a pattern or practice of decision-making, the order must specify the decision-making that constitutes the pattern or practice, including specific provisions the [*Land Conservation and Development*] commission believes are being misapplied.

(b) The specific lands, if any, within a local government for which the existing plan or land use regulation, if any, does not comply with the goals.

(c) The corrective action decided upon by the commission, including the specific requirements, with which the local government, state agency or special district must comply. In the case of a pattern or practice of decision-making, the commission may require revisions to the comprehensive plan, land use regulations or local procedures which the commission believes are necessary to correct the pattern or practice. Notwithstanding the provisions of this section, except as provided in subsection (3)(c) of this section, an enforcement order does not affect:

(A) Land use applications filed with a local government prior to the date of adoption of the enforcement order unless specifically identified by the order;

(B) Land use approvals issued by a local government prior to the date of adoption of the enforcement order; or

(C) The time limit for exercising land use approvals issued by a local government prior to the date of adoption of the enforcement order.

(2) Judicial review of a final order of the commission is governed by the provisions of ORS chapter 183 applicable to contested cases except as otherwise stated in this section. The commission's final order must include a clear statement of findings which set forth the basis for the order. Where a petition to review the order has been filed in the Court of Appeals, the commission shall transmit to the court the entire administrative record of the proceeding under review. Notwithstanding ORS 183.482 (3) relating to a stay of enforcement of an agency order, an appellate court, before it may stay an order of the commission, shall give due consideration to the public interest in the continued enforcement of the commission's order and may consider testimony or affidavits thereon. Upon review, an appellate court may affirm, reverse, modify or remand the order. The court shall reverse, modify or remand the order only if it finds:

(a) The order to be unlawful in substance or procedure, but an error in procedure is not cause for reversal, modification or remand unless the court finds that substantial rights of any party were prejudiced thereby;

(b) The order to be unconstitutional;

(c) The order is invalid because it exceeds the statutory authority of the agency; or

(d) The order is not supported by substantial evidence in the whole record.

(3)(a) If the commission finds that in the interim period during which a local government, state agency or special district would be bringing itself into compliance with the commission's order [*under ORS 197.320 or subsection (2) of this section*] it would be contrary to the public interest in the conservation or sound development of land to allow the continuation of some or all categories of land use decisions or limited land use decisions, it shall, as part of its order, limit, prohibit or require the approval by the local government of applications for subdivisions, partitions, building permits, limited land use decisions or land use decisions until the plan, land use regulation or subsequent land use decisions and limited land use decisions are brought into compliance. The commission may issue an order that requires review of local decisions by a hearings officer or the Department of Land Conservation and Development before the local decision becomes final.

(b) Any requirement under this subsection may be imposed only if the commission finds that the activity, if continued, aggravates the goal, comprehensive plan or land use regulation violation and that the requirement is necessary to correct the violation.

(c) The limitations on enforcement orders under subsection (1)(c)(B) of this section do not affect the commission's authority to limit, prohibit or require application of specified criteria to subsequent land use decisions involving land use approvals issued by a local government prior to the date of adoption of the enforcement order.

(4) As part of its order [*under ORS 197.320 or subsection (2) of this section*], the commission may withhold grant funds from the local government to which the order is directed. As part of an order issued under this section, the commission may notify the officer responsible for disbursing state-shared revenues to withhold that portion of state-shared revenues to which the local government is entitled under ORS 221.770, 323.455, 366.762 and 366.800 and ORS chapter 471 which represents the amount of state planning grant moneys previously provided the local government by the commission. The officer responsible for disbursing state-shared revenues shall withhold state-shared revenues as outlined in this section and shall release funds to the local government or department when notified to so do by the commission or its designee. The commission may retain a portion of the withheld revenues to cover costs of providing services incurred under the order, including use of a hearings officer or staff resources to monitor land use decisions and limited land use decisions or conduct hearings. The remainder of the funds withheld under this provision shall be released to the local government upon completion of requirements of the [*commission*] **enforcement** order.

(5)(a) As part of its order under this section, the commission may notify the officer responsible for disbursing funds from any grant or loan made by a state agency to withhold such funds from a special district to which the order is directed. The officer responsible for disbursing funds shall withhold funds as outlined in this section and shall release funds to the special district or department when notified to do so by the commission.

(b) The commission may retain a portion of the funds withheld to cover costs of providing services incurred under the order, including use of a hearings officer or staff resources to monitor land use decisions and limited land use decisions or conduct hearings. The remainder of the funds withheld under this provision shall be released to the special district upon completion of the requirements of the commission order.

(6) As part of its order under this section, upon finding a city failed to comply with ORS 197.320 (13), the commission may, consistent with the principles in ORS 197A.130 (1), require the city to:

(a) Comply with the housing acceleration agreement under ORS 197A.130 (6).

(b) Take specific actions that are part of the city's housing production strategy under ORS 197A.100.

(c) Impose appropriate models that have been developed by department, including model ordinances, procedures, actions or anti-displacement measures.

(d) Reduce maximum timelines for review of needed housing or specific types of housing or affordability levels, [*including*] through ministerial approval or any other expedited existing approval process.

(e) Take specific actions to waive or amend local ordinances.

(f) Forfeit grant funds under subsection (4) of this section.

(7) The commission may institute actions or proceedings for legal or equitable remedies in the Circuit Court for Marion County or in the circuit court for the county to which the [*commission's*] order is directed or within which all or a portion of the applicable city is located to enforce compliance with the provisions of any order issued under this section or to restrain violations thereof. Such actions or proceedings may be instituted without the necessity of prior agency notice, hearing [*and*] **or** order on an alleged violation.

(8) As used in this section, "enforcement order" or "order" means an order issued under ORS 197.320 or section 3 of this 2024 Act as may be modified on appeal under subsection (2) of this section.

SECTION 65. ORS 183.471 is amended to read:

183.471. (1) When an agency issues a final order in a contested case, the agency shall maintain the final order in a digital format that:

(a) Identifies the final order by the date it was issued;

(b) Is suitable for indexing and searching; and

(c) Preserves the textual attributes of the document, including the manner in which the document is paginated and any boldfaced, italicized or underlined writing in the document.

(2) The Oregon State Bar may request that an agency provide the Oregon State Bar, or its designee, with electronic copies of final orders issued by the agency in contested cases. The request must be in writing. No later than 30 days after receiving the request, the agency, subject to ORS 192.338, 192.345 and 192.355, shall provide the Oregon State Bar, or its designee, with an electronic copy of all final orders identified in the request.

(3) Notwithstanding ORS 192.324, an agency may not charge a fee for the first two requests submitted under this section in a calendar year. For any subsequent request, an agency may impose a fee in accordance with ORS 192.324 to reimburse the agency for the actual costs of complying with the request.

(4) For purposes of this section, a final order entered in a contested case by an administrative law judge under ORS 183.625 (3) is a final order issued by the agency that authorized the administrative law judge to conduct the hearing.

(5) This section does not apply to final orders by default issued under ORS 183.417 (3) or to final orders issued in contested cases by:

(a) The Department of Revenue;

(b) The State Board of Parole and Post-Prison Supervision;

(c) The Department of Corrections;

(d) The Employment Relations Board;

(e) The Public Utility Commission of Oregon;

(f) The Oregon Health Authority;

(g) The Land Conservation and Development Commission**, except for enforcement orders under section 3 of this 2024 Act**;

(h) The Land Use Board of Appeals;

(i) The Division of Child Support of the Department of Justice;

(j) The Department of Transportation, if the final order relates to the suspension, revocation or cancellation of identification cards, vehicle registrations, vehicle titles or driving privileges or to the assessment of taxes or stipulated settlements in the regulation of vehicle related businesses;

(k) The Employment Department or the Employment Appeals Board, if the final order relates to benefits as defined in ORS 657.010;

(L) The Employment Department, if the final order relates to an assessment of unemployment tax for which a hearing was not held;

(m) The Employment Department, if the final order relates to:

(A) Benefits, as defined in ORS 657B.010;

(B) Employer and employee contributions under ORS 657B.150 for which a hearing was not held;

(C) Employer-offered benefit plans approved under ORS 657B.210 or terminated under ORS 657B.220; or

(D) Employer assistance grants under ORS 657B.200; or

(n) The Department of Human Services, if the final order was not related to licensing or certification.

SECTION 66. ORS 455.770 is amended to read:

455.770. (1) In addition to any other authority and power granted to the Director of the Department of Consumer and Business Services under ORS 446.003 to 446.200, 446.225 to 446.285, 446.395 to 446.420, 479.510 to 479.945, 479.995 and 480.510 to 480.670 and this chapter and ORS chapters 447, 460 and 693 **and sections 1 to 5 of this 2024 Act**, with respect to municipalities, building officials and inspectors, if the director has reason to believe that there is a failure to enforce or a violation of any provision of the state building code or ORS 446.003 to 446.200, 446.225 to 446.285, 446.395 to 446.420, 479.510 to 479.945, 479.995 or 480.510 to 480.670 or this chapter or ORS chapter 447, 460 or 693 or any rule adopted under those statutes, the director may:

(a) Examine building code activities of the municipality;

(b) Take sworn testimony; and

(c) With the authorization of the Office of the Attorney General, subpoena persons and records to obtain testimony on official actions that were taken or omitted or to obtain documents otherwise subject to public inspection under ORS 192.311 to 192.478.

(2) The investigative authority authorized in subsection (1) of this section covers the violation or omission by a municipality related to enforcement of codes or administrative rules, certification of inspectors or financial transactions dealing with permit fees and surcharges under any of the following circumstances when:

(a) The duties are clearly established by law, rule or agreement;

(b) The duty involves procedures for which the means and methods are clearly established by law, rule or agreement; or

(c) The duty is described by clear performance standards.

(3) Prior to starting an investigation under subsection (1) of this section, the director shall notify the municipality in writing setting forth the allegation and the rules or statutes pertaining to the allegation and give the municipality 30 days to respond to the allegation. If the municipality does not satisfy the director's concerns, the director may then commence an investigation.

(4) If the Department of Consumer and Business Services or the director directs corrective action[*, the following shall be done*]:

(a) The corrective action [*shall*] **must** be in writing and served on the building official and the chief executive officers of all municipalities affected;

(b) The corrective action [*shall*] **must** identify the facts and law relied upon for the required action; and

(c) A reasonable time [*shall*] **must** be provided to the municipality for compliance.

(5) The director may revoke any authority of the municipality to administer any part of the state building code or ORS 446.003 to 446.200, 446.225 to 446.285, 446.395 to 446.420, 479.510 to 479.945, 479.995 or 480.510 to 480.670 or this chapter or ORS chapter 447, 460 or 693 or any rule adopted under those statutes if the director determines after a hearing conducted under ORS 183.413 to 183.497 that:

(a) All of the requirements of this section and ORS 455.775 and 455.895 were met; and

(b) The municipality did not comply with the corrective action required.

CAPTIONS

SECTION 67. The unit and section captions used in this 2024 Act are provided only for the convenience of the reader and do not become part of the statutory law of this state or express any legislative intent in the enactment of this 2024 Act.

EFFECTIVE DATE

SECTION 68. This 2024 Act takes effect on the 91st day after the date on which the 2024 regular session of the Eighty-second Legislative Assembly adjourns sine die.

Passed by Senate February 29, 2024

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Obadiah Rutledge, Secretary of Senate

.....
Rob Wagner, President of Senate

Passed by House March 4, 2024

.....
Dan Rayfield, Speaker of House

Received by Governor:

.....M.,....., 2024

Approved:

.....M.,....., 2024

.....
Tina Kotek, Governor

Filed in Office of Secretary of State:

.....M.,....., 2024

.....
LaVonne Griffin-Valade, Secretary of State