



A VISION FOR SENIOR HOUSING AT SOUTHERN OREGON UNIVERSITY

credit: Southern Oregon University

DEVELOPMENT TEAM QUALIFICATIONS

Significant Senior Housing Experience: McCormack Baron Salazar's (MBS) roots in senior housing development has been a cornerstone of our practice since the founding of the company half a century ago. To date the company has developed 27 senior housing public private projects in nine states, Puerto Rico, and the US Virgin Islands, totaling more than 2,700 units serving seniors with quality affordable housing and services to support independent, healthy living.

Our housing developments reflect the desire amongst our older residents to "age in place" in the least restrictive environment. This includes a safe, attractive residence that supports and encourages autonomy. Merging well-designed supportive physical environments with staff that are professionally trained to work with the elderly is the keystone of our operations.

As the project architect, the Lawrence Group is a full-service design firm with over 20 years of design expertise in senior living. We have developed a thorough understanding of the needs, safety considerations, and ever-changing lifestyle preferences of senior residents. Our team is experienced in designing spaces that promote comfort, well-being, and experience, while meeting accessibility guidelines and other regulatory requirements.

History of Strong Partnerships and Collaboration: In the last five years alone, MBS has worked alongside 30+ anchor institutions—including housing and transportation authorities, municipalities, hospital systems, and foundations—to develop large-scale, housing projects. With every project, we work closely with community partners, community members, and future residents from planning and design to ongoing management of senior communities. Our goal is an environment that serves the needs of both the community and the residents who will be living there.

Unmatched Experience in Financing Large-Sale

Housing: MBS is a pioneer in large-scale, multifamily and senior housing rental finance for five decades. MBS has frequently employed innovative financing strategies, public/private partnerships, and blended finance structures that leverage and layer both public and private financing in order to turn our partners' vision for their community into a reality. Our work has resulted in 26,700 units and \$5.9 billion in total development costs. The financing for these projects includes \$984 million in private debt, \$2.3 billion in equity, \$956 million in federal grants, \$1.3 billion in state and local government support, and \$229 million from private foundations and corporations.

Commitment to Sustainability: MBS has extensive experience in building Green and Sustainable urban neighborhoods in cities across the United States. In total, MBS has developed over 11,300 units that has incorporated sustainable features, including 35 LEED-certified developments with over 3,300 units.

Flexibility: Our team is ready to listen, collaborate with SOU as our partner, and make needed changes to the proposed development. We understand the preliminary nature of the RFP and the need to adapt the project based on funding constraints, opportunities, community feedback, and the needs and capacity of our partner.



credit: prostock-studio



credit: Getty Images

PROPOSED DEVELOPMENT SUMMARY

Over the course of the past century, advancements in medicine, public health, and genetics observed worldwide have led to significant increases in average life expectancy, resulting in a so-called ‘**third age**’ that presents new opportunities and renewed purposes for modern elders. Seniors may have retired from various lines of work, but they remain seeking **engagement, creativity, and meaningful connection** as part of their lifestyle.

We propose to begin with an examination of the following guiding themes: **dynamic social connection spaces, independent living efficiency modules, mind and body wellness amenities, and environmentally sustainable building systems.** This overall vision and guiding themes

are informed by a neighborhood analysis of existing amenities within five minutes of the site, a survey of independent living facilities in the region, a view corridor study, the RFQ and addenda, and an assessment of SOU’s master plan and expressed mission and goals. Our proposal is also shaped by our own expertise in developing, designing, and financing high-quality independent living communities in the West Coast region and across the country in the past 50 years.

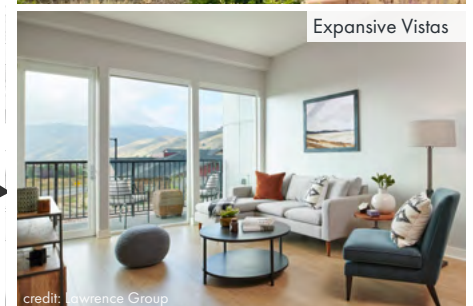
The proposed development includes a two- to four-story, elevator-served building consisting of 90 one-bedroom units at an average of 800 square feet each and 10 two-bedroom units at an average square feet of 1,050 square feet each. This preliminary scheme shows 24,000 square feet of amenities and services for a wellness and fitness centers, an OLLI Satellite (learning center), dining venues, active and passive common areas, conveniences, concierge facilities, and third-party rental opportunities.

Our team understand the preliminary nature of the RFP and **the importance of flexibility.** The unit breakdown is subject to change. We would work with SOU and the campus and surrounding Ashland communities to determine the appropriate number of units and density. Services and amenities will also shift depending on a careful study of the market, SOU’s goals, and financing resources available.

Preliminary Neighborhood Analysis



Indigenous Planting



Expansive Vistas



Framed Views

credit: Lawrence Group

Precedent Imagery

OPERATING TYPE

Independent Senior Living
Rental Community for Ages 55 and Up

UNIT MIX

90 one-bedroom units at 800 SF
10 two-bedroom units at 1,050 SF

POTENTIAL FINANCING STRUCTURES

- > Mortgage debt, equity, & soft sources
- > 501(c)3 structure
- > Low-Income Housing Tax Credit structure (62 and up)

Dynamic Social Connection Spaces



Passive Commons



credit: Architectural Digest

Low-Impact and Sustainable



credit: Thinkstock

Fitness/Wellness Center



Common Dining Areas



credit: Ximena Natera, Berkeley/ Catchlight

OLLI Satellite (Learning Center)



Conceptual Site Plan

