

Summary of PRS's proposal for a Life Plan Community at SOU

Southern Oregon University requested proposals from qualified senior housing providers to develop and operate a facility where the Cascade Complex of dormitories used to be. PRS's proposed project is intended to generate long-term revenue for the University while furthering SOU's vision, mission, and goals and supporting its commitment to lifelong learning.

About Pacific Retirement Services

PRS is a Medford-based nonprofit company with over 60 years of experience in senior communities, including university-based retirement living. Our family includes:

- Rogue Valley Manor, which has been serving seniors in Medford since 1961.
- Mirabella at ASU, an innovative university-based community located on Arizona State University's Tempe campus.
- A total of 14 Life Plan Communities serving 7,000 older adults supported by 3,300 employees. We provide a full continuum of care, from independent living to assisted living to skilled nursing and memory support.
- 25 affordable housing communities, including Donald E. Lewis in Ashland.
- Community Volunteer Network, serving 1,200 older adults in Jackson, Josephine, Lane, and Klamath counties. CVN encompasses the Retired Senior Volunteer Program, Call-A-Ride, and Foster Grandparents, among other programs.

Our mission is to **empower people to lead meaningful lives as they age**. The PRS project at SOU will empower older adults to learn, share their wisdom and experience, and collaborate with younger generations to enhance the University and broader community.

Our Vision for a Life Plan Community at SOU

We envision a community at SOU that fosters intergenerational learning, community engagement, and healthy aging while supporting SOU's educational mission and financial sustainability. We recommend a Life Plan Community model where residents pay an initial entrance fee in exchange for lifetime residency and care. Residents of the SOU-based community will also pay ongoing monthly fees to cover the cost of community operations, including dining, housekeeping, wellness classes, and other services.

Our proposal describes two possible options for the nonprofit housing project:

Option A: A satellite campus of Rogue Valley Manor. This model leverages RVM's established brand, healthcare infrastructure, and regional reputation for excellence. It provides SOU with immediate access to a large lead base, proven operational infrastructure, reduced development risk, and shared operational costs. And for RVM, such a partnership offers more opportunities for residents who already enjoy Ashland's theaters, restaurants, art scene, and Osher Lifelong Learning Institute programs.

Option B: A new standalone community brand. This model reflects Ashland's artistic spirit, academic vitality, and connection to nature to inspire new possibilities for living well. The community's design incorporates elements that reflect Ashland's biodiversity, energy-efficient systems, and spaces that blur the line between indoors and outdoors.

As with PRS's Mirabella at ASU community, residents of either model will be deeply embedded in academic and campus life. They will:

- Participate in research, classroom activities, and campus events.
- Support arts and cultural programs with their knowledge, skills, and resources.
- Volunteer in university and community initiatives.
- Mentor and advise students.

Benefits to SOU

The benefits of our proposed community to SOU are numerous. They include:

Financial—Long-term ground lease payments, philanthropic gifts, and research funding.

Academic—New programs, research opportunities, and enhanced curriculum that will accommodate a previously underserved but growing contingent of non-traditional students.

Cultural—Promotion of age diversity on campus and the opportunity to create powerful support systems for first-generation and exchange students.

Reputation—National recognition as a pioneer in university-based retirement communities.

Benefits to Students

- Mentorship and career guidance from accomplished residents.
- Internships and jobs in healthcare, hospitality, and research.
- Exposure to aging-related fields and intergenerational collaboration.
- Access to residents for use in longevity or age-related research and projects.

Benefits to Ashland

- Shared amenities that serve both residents and community members, such as classrooms, art studios, wellness centers, community gardens, public cafés, or childcare with resident volunteers.
- Opportunities to partner with downtown businesses and arts organizations.
- Support of local businesses through resident spending and collaboration.
- Advancement of the city's goals through engagement with the project's residents, including new opportunities for high-impact volunteerism and philanthropy.

Project Overview and Features

Sustainable, Community-Oriented Design

Central to the design of our Life Plan Community at SOU is sustainability. It features:

- 165–185 independent living residences.
- Nature-inspired and energy-efficient architecture.
- Underground parking and walkable access to downtown Ashland.
- LED lighting, smart irrigation, and low-flow fixtures.
- Eco-friendly materials and green building practices.

Establishment of a Center for Vital Aging and Intergenerational Exchange

We recommend establishing a new academic center at SOU focused on aging, wellness, and intergenerational learning. This center will:

- Attract research funding and philanthropic support.

- Offer new academic and career pathways for students.
- Position SOU as a national leader in innovative aging studies.

From a research perspective, the center could examine how place, culture, and community shape the aging experience. This approach would create value for students, the project, and the broader community, while allowing SOU to contribute meaningful insights to one of society's most pressing challenges, a rapidly aging population.

We see the center as being a second phase of the project, funded through donations from residents of the Life Plan Community and major donors. It could enhance lifelong learning opportunities for Ashland residents and provide additional space for student activities.

A Collaborative Development Process

As we do with all major development, we emphasize a phased, stakeholder-driven process:

Feasibility and Planning—Engage SOU, city officials, and community members to refine the project vision and define requirements.

Design and Market Testing—Host community meetings and sales events to gather feedback and gauge interest. Continue refining the project based on feedback.

Presales and Construction—Market the project to local and out-of-market older adults. After pre-sales goals are met, work with local contractors to deliver a completed project to the operations team.

Operations and Ongoing Integration—Hire team members from Ashland and the surrounding community. After opening, maintain strong ties with SOU and Ashland through shared programming, resident engagement, and local leaders serving in governance roles.

Next Steps

If selected, PRS will:

- Determine which of our two proposed project options is the best fit for the site, University, and Ashland community.
- Meet with University stakeholders to understand program needs and how the project could support students and faculty.
- Engage with City of Ashland officials to understand how the project can advance municipal goals.
- Begin community outreach to identify opportunities for public spaces and programs that benefit both residents and neighbors. We will also explore partnerships and other opportunities with local businesses, arts organizations, and nonprofits.
- Launch early marketing and resident engagement to gauge market demand.

We will remain flexible and continue to hone the project based on market research and feasibility studies. We welcome ideas, feedback, and collaboration from all stakeholders.

We estimate the entire process—pre-development research, planning, permitting, financing, construction, and opening—will take three to four years.

We look forward to working with SOU to create a successful, sustainable, university-based Life Plan Community that benefits the University, students, older adults, and generations to come.