



# MUPTE Application

The Multi-Unit Property Tax Exemption (MUPTE) is an incentive program to encourage high quality downtown housing. This ten-year exemption is enabled by state law; each project must be approved by the Eugene City Council. Both rental housing and multi-unit housing for home ownership are eligible; student housing is ineligible. The commercial portion of a project is eligible for an exemption if deemed a public benefit by City Council. Projects must be within an area generally bounded by Charnelton Street, 11<sup>th</sup> Avenue, Hilyard Street, the Willamette River, and Shelton McMurphy Boulevard. (See the map in the Program Guide page 4.)

## RELATED CITY DOCUMENTS

City Council most recently revised the program with Ordinance 20556, adopted on 7/13/2015. Administrative Rule 53-15-12-F sets out additional program guidelines. A Program Guide is attached to this application and includes a summary of the program with ordinance and administrative rule citations.

## GENERAL APPLICATION PROCESS

Prior to completing the application, you need to arrange for and attend one public engagement opportunity with residents in the neighborhood, including the board of any City-recognized affected neighborhood association. At least one of the owners/principals needs to attend the meeting. (The Program Guide contains information on post-approval required neighborhood engagement.)

The non-financial materials included with the application will be reviewed by staff and a 30-day written comment period will start. The financial information will be reviewed by an independent professional consultant. The City Manager will then convene the Project Review Panel to review the application's conformance with program criteria and the consultant's financial conclusions. The Project Review Panel will make a recommendation to the City Manager on the application; the City Manager will provide the City Council with a recommendation on the application for Council consideration.

Complete the information requested below. A checklist of the required attachments is on page 9. Please call or email Amanda Nobel Flannery, if you have questions at 541-682-5535 or [amanda.nobel@ci.eugene.or.us](mailto:amanda.nobel@ci.eugene.or.us).

- Submit three paper copies of the completed application to:  
City of Eugene  
ATTN: Amanda Nobel Flannery  
99 West 10th Avenue  
Eugene, OR 97401
- Email a digital copy to: [amanda.nobel@ci.eugene.or.us](mailto:amanda.nobel@ci.eugene.or.us)

# MUPTE Application



## Applicant Information

Applicant's Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zipcode: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_  
Housing Project Name: \_\_\_\_\_

## Site Location

Assessor's Property Acct No.: \_\_\_\_\_  
Map / Tax Lot No. \_\_\_\_\_  
Site Location Address: \_\_\_\_\_  
*(if no address available, give a written description)*

\*Attach legal description of the property.

## Current Use & Site Information

Current Zoning: \_\_\_\_\_  
Parcel Size: \_\_\_\_\_  
Minimum Density Allowed: \_\_\_\_\_  
Maximum Density Allowed: \_\_\_\_\_  
Number of Parking Spaces Required: \_\_\_\_\_  
Assessed Value of Land : \_\_\_\_\_  
Assessed Value of Improvements: \_\_\_\_\_  
Current Property Taxes: \_\_\_\_\_

Attach a written description of the existing use of the property.

Is existing sound housing or housing that can be rehabilitated on the property?      Yes      No  
If yes, attach a plan for relocation or a justification for elimination.

## Proposed Project Information

Density of Proposed Project: \_\_\_\_\_ units per net acre  
Proposed No. of Parking Spaces: \_\_\_\_\_  
Proposed Lot Coverage: \_\_\_\_\_ %  
Building Footprint: \_\_\_\_\_ square feet  
Building Square Footage: \_\_\_\_\_ square feet  
Commercial Square Footage: \_\_\_\_\_ square feet

The commercial portion of a project is eligible for an exemption, if it is deemed a public benefit by City Council. Do you want City Council to consider exempting the commercial portion of the project also?      Yes      No

Total Number of Dwelling Units: \_\_\_\_\_ (All projects must have 5 or more units)

Total Number of Bedrooms: \_\_\_\_\_

No. of Floors: \_\_\_\_\_

Student housing and transient uses are not eligible for the MUPTE program. <sup>1</sup>

\_\_\_\_ Initial here to indicate that student housing and transient uses will not be part of the proposed project.

Attach two schematic drawings drawn to a minimum scale of one inch equals 16 feet (1" = 16'):

1. Site plan and major features and dimensions of the proposed development.
2. Side and front elevations of the proposed development.

Identify on both drawings public and private access, parking and circulation plans, and proposed landscaping design. If Council approves the exemption, these schematic drawings will be attached to the approval resolution.

Attach a written description of the exterior finishes, public and private access, parking and circulation plans, and proposed landscaping design.

**UNIT MIX**

Unit Size	#	Avg. Square Feet Per Unit	Proposed Avg. Rental Rate
Studio / efficiency			
One bedroom			
Two bedroom			
Three bedroom			
Four bedroom			
Five bedroom			
Commercial/retail			
ADA Accessible			
Parking – onsite			
Parking – offsite			

<sup>1</sup> “Student housing” is housing specifically built for living space for undergraduate and graduate students where the leasing unit is by room or bed (not an entire residential unit), and unit configurations take the form of several bedrooms with individual bathrooms and sparse common space. Project amenities and location are selected to appeal only to students and offer limited viability as potential housing for the general population, particularly families.

**COMPLIANCE WITH LOCAL LAW**

The proposed project must, at all relevant times, be in conformance with:

- a) All local plans and planning regulations, including special or district-wide plans developed and adopted pursuant to ORS chapters 195, 196, 197, 215 and 227, that are applicable at the time the application is approved
- b) Licensing laws.

\_\_\_\_\_ Initial to indicate your understanding of this requirement and commitment to adhere to it.

**NEIGHBORHOOD ENGAGEMENT** Provide the following to document your neighborhood engagement:

Neighborhood Association: \_\_\_\_\_

Date of Meeting: \_\_\_\_\_

Name(s) of Principal(s)/Owner(s) in Attendance: \_\_\_\_\_

Attach minutes from meeting.

Attach comments received at meeting or since meeting.

If the event was not an official neighborhood association event, attach evidence of advertising method(s) and an explanation for why it was not an official event. The Program Guide contains information on post-approval required neighborhood engagement.

**Required Public Benefits**

Use this section to address each of the following required public benefits related to the proposed project, one or more of which must extend beyond the period of the tax exemption.

**1. COMPACT URBAN DEVELOPMENT**

The MUPTE program is designed to encourage higher density housing and redevelopment in the City’s downtown area.

- a) Put a check next to the zone category of the property:
  - \_\_\_ *Residential zones*: at least 175% of minimum density for the zone.  
(e.g. R-4 High Density Residential)
  - \_\_\_ *Form-based zones with height limit of three or four stories*: at least 30 units per net acre.  
(e.g. S-DR Downtown Riverfront Special Area)
  - \_\_\_ *Mixed-use development*<sup>2</sup>: at least the minimum density in the zone.  
(e.g. C-2 Community Commercial, C-3 Major Commercial)
  - \_\_\_ *All other areas, including residential-only development in commercial or mixed use zones*:  
at least 50 units per net acre.  
(e.g. S-W Whiteaker Special Area, S-F Fifth Avenue Special Area, S-H Historic, C-2 Community Commercial, C-3 Major Commercial)
- b) Density for proposed project: \_\_\_\_\_ units per net acre

<sup>2</sup> Mixed-use development incorporates both commercial and residential use in the same building.

**2. GREEN BUILDING FEATURES**

The green building requirement is that projects perform at least 10% more efficiently than the performance established in the Oregon Energy Efficiency Specialty Code (OEEESC). Only the residential occupancy and common areas associated with residential areas are considered (e.g., hallways, stairwells, centralized HVAC or hot water heating, laundry facilities). It does not apply to the commercial areas or ancillary amenities (e.g., parking garage, swimming pools, recreation centers). Pathways for complying with the requirement are based on the number of floors for the project: 1-3 story projects and 4 or more story projects.

Pathway	Building Size	
	1-3 Stories	>3 Stories
<b>LEED v4 for Homes</b>	Low-Rise: Certified + modeled at 10% above Oregon code	Mid-Rise: Certified + modeled at 10% above Oregon code
<b>Earth Advantage</b>	Multifamily: Certified + commissioning report	N/A
<b>City of Eugene BPS</b>	N/A	Modeled at 10% above Oregon code + commissioning report

- a) The pathway applicable to the proposed project is \_\_\_\_\_.
- b) Use the table below to identify any additional items to include with your application based on the pathway identified above.

Pathway	Submit with Application
<i>LEED v4 for Homes</i>	<ul style="list-style-type: none"> <li>• LEED Registration Number</li> <li>• Project Checklist</li> </ul>
<i>Earth Advantage</i>	Earth Advantage Points Worksheet
<i>City of Eugene BPS</i>	n/a

- c) See the Green Building Fact Sheet (page 14) for the required documentation that will need to be provided to the City should your project be awarded the MUPTE and other useful information.  
 \_\_\_ Initial here to indicate your understanding that you will need to demonstrate building energy performance 10% above current OEEESC performance by submitting the items listed on p. 14 at permit application and after construction.
- d) Will onsite parking be provided: \_\_\_ Yes \_\_\_ No  
 If yes, all projects that provide on-site parking must install conduit for future electric vehicle charging stations.  
 \_\_\_ Initial here to indicate your understanding of this requirement and agreement to include conduit should MUPTE be awarded.

**3. LOCAL ECONOMIC IMPACT PLAN**

Complete the attached Local Economic Impact Plan Worksheet (page 11).

#### 4. MODERATE-INCOME HOUSING CONTRIBUTION

Each owner must either a) pay a fee to be dedicated to moderate-income housing or b) include not less than 30% of the total units as moderate-income housing units. Check next to the manner in which this proposed project will contribute to moderate-income housing.

- Pay the moderate-income housing fee of 10% of the total exemption benefit for the 10-year benefit.
  - Paid upfront with a 5% discount
  - Paid annually in years 3 through 10
- Include moderate-income housing units. Complete the Moderate-Income Housing Worksheet (page 13).

#### 5. PROJECT DESIGN AND COMPATIBILITY

Attach a written narrative, with supporting graphics, renderings, or elevations of the proposed development that describes how the project will address the basic design concepts listed below. For guidance, refer to the Community Design Handbook, which can be found at [www.eugene-or.gov/designhandbook](http://www.eugene-or.gov/designhandbook) or in hard copy at the Planning and Development Department.

- *Scale, form and quality of the building(s).* Buildings are designed for the human scale, appropriate to local climate and natural resiliency, to engage the street, promote transparency, help define a sense of place, fit the neighborhood, and employ high-quality and contextually appropriate materials and colors.
- *Mixture of project elements.* The proposal employs a mixture of project elements that contribute to a walkable downtown, encourage biking and transit use, enrich the streetscape, and support community comfort and safety at all hours.
- *Relationship to the street and surrounding uses.* The proposal is designed to engage and enrich the streetscape, as well as respect and enhance the existing surrounding uses.
- *Parking and circulation.* Parking is designed to provide, to the greatest extent possible, locations for car sharing, integrated shared-parking strategies, electric car charging stations, and safe and attractive pedestrian/bicycle connections between parking and adjacent buildings and streets.

#### 6. HISTORIC & EXISTING HOUSING SENSITIVITY

- a) Any application for a project that is immediately adjacent or contiguous to a historic locale shall include a plan to mitigate impacts to the historic locale.<sup>3</sup> The project shall preserve and enhance an existing historic locale, as evidenced by a concept plan that has been reviewed by a Planning & Development Department staff person with expertise in design and historic preservation. No exemption shall be granted for any property where a historic structure or potential historic structure has been demolished or removed from the property within the two years immediately preceding the MUPTE application date. This

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<sup>3</sup> As defined in the Administrative Rule, an historic locale is a building that has historic, cultural and/or architectural significance, locally, regionally, or nationally. A historic locale can also include a building acknowledged by the Eugene Historic Review Board as strongly or possibly eligible for City Landmark or National Register listing.

restriction shall be waived if the owner of the property gave notice of the intent to demolish or move the structure to Planning staff responsible for historic review issues at least 60 days before the owner's application for a demolition or moving permit from the City.

i. Is the project immediately adjacent or contiguous to an historic locale?<sup>4</sup>

Yes No

If yes, [attach](#) the confirmation letter from Planning staff that states the concept plan review is complete and accepted.

ii. Was an historic structure or potential historic structure demolished or removed from the property within the two years immediately preceding the date of application for the exemption?

Yes No

If yes, [attach](#) the letter from Planning staff that states proper notification was provided before removing any structures and that historic structures were appropriately addressed.

b) No exemption shall be granted for any property on which any housing unit has been demolished or removed from the property within the last two years. This restriction can be waived if the proposed project increases the number of dwelling units by 50% from what previously existed or if it replaces the old units by significantly larger units that will accommodate families.

Was housing demolished or removed from the property within the prior two years?

Yes No

If yes, Number of units: \_\_\_\_\_

Number of houses: \_\_\_\_\_

Number of bedrooms per house: \_\_\_\_\_

## 7. PROJECT WOULD NOT BE BUILT WITHOUT EXEMPTION

The applicant must demonstrate that the project as proposed could not be built but for the benefit of the tax exemption. Attach the following documentation:

- ten-year pro-forma with MUPTE,
- ten year pro-forma without MUPTE,
- analysis of the projected ten-year cash-on-cash rate of return for the proposed project,
- list of assumptions made to create the pro-formas, including a description of how property taxes were estimated for the without MUPTE pro-forma, and the moderate-income housing fee or rent levels,
- development budget, and
- sources and uses of financing.

Be sure to include the moderate-income housing fee or rent levels in the pro-formas and list of assumptions. This information will be reviewed by an independent professional consultant to determine the financial feasibility, at the applicant's expense to be paid to the City with the

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<sup>4</sup> Contact Rodney Bohner with the City of Eugene's Planning Department to determine whether the project is adjacent or contiguous to a historic locale. ([Rodney.t.bohner@ci.eugene.or.us](mailto:Rodney.t.bohner@ci.eugene.or.us), 541-682-5437)

application fee. The consultant will make a recommendation on the application for the Project Review Panel and the City Manager.

**Application Fee Information**

Application fee \$2,400\* made payable to City of Eugene. This is comprised of the \$400 base fee plus \$2,000 for the independent financial consultant. (Payment of other reasonable costs may be required, if incurred by the City or County in processing this application. Such costs must be paid prior to the granting of final approval.)

**Property Owner Authorization**

If the applicant is not the current property owner, the applicant must either have the property owner sign on the application below OR include documentation authorizing the applicant to apply for the tax exemption on the owner’s behalf.<sup>5</sup>

By: \_\_\_\_\_ Date: \_\_\_\_\_  
Property Owner’s Signature

**Application Verification**

I swear or affirm that all information contained in this application is accurate and all statements are true.

By: \_\_\_\_\_ Date: \_\_\_\_\_  
Applicant Signature

State of OREGON

County of \_\_\_\_\_

Signed and sworn to (or affirmed) before me on \_\_\_\_\_20\_\_\_\_\_, by \_\_\_\_\_

\_\_\_\_\_  
Notary Public for Oregon

<sup>5</sup> Administrative Order 53-18-03-F



## Required Attachments Checklist

### PROPERTY & SCHEMATIC INFORMATION

- Legal description of the property
- Written description of the existing use of the property
- If** the property includes sound housing or housing that can be rehabilitated, attach a plan for its relocation or a justification for its elimination
- Schematic drawing that shows the site plan and major features and dimensions of the proposed development\*
- Schematic drawing that shows side and front elevations of the proposed development\*
- Written description of the exterior finishes, public and private access, parking and circulation plans, and proposed landscaping design

\* Drawn to a minimum scale of one inch equals 16 feet (1" = 16')

### NEIGHBORHOOD ENGAGEMENT

- Minutes from meeting
- Comments received at meeting or since meeting
- If** not an official neighborhood association event, attach evidence of advertising method(s) and explanation for why it was not an official event

### GREEN BUILDING

- Materials based on pathway selected

Pathway	Submit with Application
<b>LEED v4 for Homes</b>	<ul style="list-style-type: none"> <li>• LEED Registration Number</li> <li>• Project Checklist</li> </ul>
<b>Earth Advantage</b>	Earth Advantage Points Worksheet
<b>City of Eugene BPS</b>	n/a

### MODERATE-INCOME HOUSING CONTRIBUTION

- If** the project will include moderate-income units, attach the completed the worksheet (page 13)

### LOCAL ECONOMIC IMPACT

- Completed worksheet
- Narrative as described in the worksheet

### PROJECT DESIGN & COMPATIBILITY

- Written and graphic description of how the project will address the basic design principles

**HISTORIC & EXISTING HOUSING SENSITIVITY**

- \_\_\_ **If** project is immediately adjacent or contiguous to a historic locale, attach the confirmation letter from Planning staff
- \_\_\_ **If** an historic structure or potential historic structure was demolished or removed from the property within two years immediately preceding the MUPTE application date, attach the letter from Planning staff that states proper notification was provided before removing any structures and that historic structures were appropriately addressed.

**FINANCIAL INFORMATION**

- \_\_\_ Ten-year pro-forma with MUPTE
- \_\_\_ Ten-year pro-forma without MUPTE
- \_\_\_ Analysis of the projected ten-year cash-on-cash rate of return for the proposed project
- \_\_\_ List of assumptions made to create the pro-formas, including a description of how property taxes were estimated for the without MUPTE pro-forma and the moderate-income housing fee or rent levels
- \_\_\_ Development budget
- \_\_\_ Sources and uses of financing

## Local Economic Impact Plan Worksheet

In order to ensure that a substantial portion of the local tax benefit yields a benefit to the local community, each applicant needs to include a Local Economic Impact Plan. Complete the following worksheet and attach the required written material. Instructions for what to include in your written material are indicated with an asterisk (\*).

### **A. LOCAL CONTRACTS**

Projects must have a plan for ensuring that more than 50% of the dollar volume of the combined professional services and construction contracts are or will be from a business organization or individual residing or doing business primarily in Lane County. Materials are excluded from the dollar volume calculation. If an applicant can provide evidence that a trade is not available locally, payment for services attributed to that trade may be excluded from the dollar volume calculation. Should a MUPTE be granted and at the end of construction, the developer will need to submit a report of the home city or zip code of all of the construction labor workers.

	Total Estimated Professional Services and Construction Contracts
	Local to Lane County
	% of Total that is Estimated to be Local
	Not Local to Lane County

- \* Attach narrative on how this will be achieved. Identify the likely general contractor. Also include information on trades not available locally, if applicable.

### **B. MINORITY & WOMEN BUSINESS ENTERPRISES**

MUPTE recipients need to ensure that qualified minority and women business enterprises have an equitable opportunity to compete for development related contracts. Initial next to the following three minimum steps to indicate your understanding and commitment to comply:

- \_\_\_\_\_ Developer will access lists of certified minority, women, emerging small business or disadvantaged business enterprises from the Oregon State Office of Minority, Women and Emerging Small Business (<http://www4.cbs.state.or.us/ex/dir/omwesb/>).
- \_\_\_\_\_ Developer will search for Qualified Rehabilitation Facilities from whom to procure products and services via the Oregon State Qualified Rehabilitation Facilities Program website (<http://dasapp.oregon.gov/qrf/index.aspx>).
- \_\_\_\_\_ Developer will advertise in general circulation, trade association, and minority focused media about prime subcontracting opportunities.

- \* Attach narrative on any other steps you plan to take so that minority and women business enterprises have an equitable opportunity to compete.

### C. COMPLIANCE WITH LAWS

The developer needs to ensure that all parties involved, including contractors and subcontractors, comply with wage, tax, and licensing laws. Initial next to the following four requirements to indicate your understanding and commitment to comply:

\_\_\_\_\_ Methods are in place to ensure all contractors performing work are licensed and performing in compliance with ORS 701 (Construction Contractors and Contracts).

\* *Describe the methods in the narrative that you attach to this worksheet.*

\_\_\_\_\_ Developer will provide the City with a list of all contractors performing work on the project. Before a contractor performs any work on the project, the contractor must be included on the list on file with the City. Owner will confirm that each contractor has valid, current licensing, insurance, bonding, and workers compensation coverage.

\_\_\_\_\_ Developer will require that each contractor provide an affidavit attesting to the fact that (1) the contractor, owner, or responsible managing individual for the contractor does not have any unpaid judgments for construction debt, including unpaid wages; and (2) the contractor is in compliance with Oregon tax laws described in ORS 305.620 (local taxes) and ORS Chapters 316, 317 and 318 (state income taxes). City staff can provide a template of an affidavit for this purpose, if needed.

\_\_\_\_\_ Developer will post information about the City's Rights Assistance Program in English and Spanish on the job site during construction of the project.

## Moderate-Income Housing Worksheet

Complete this worksheet for proposed projects that will include moderate-income housing units in the development.

- \* A moderate-income housing unit has rent that is affordable to a household earning the area median income (AMI). This means that the monthly rent is equal to or less than 30% of the AMI divided by 12 months:  $AMI \times 0.3 \div 12 = \text{maximum rent per month}$ .
- \* The relevant AMI is determined by the U.S. Department of Housing and Urban Development (HUD). AMI is the income which divides the income distribution of an area into two groups of equal size, half with incomes above the median and half with incomes below the median, as published on an annual basis by HUD for the Eugene-Springfield metropolitan statistical area and used interchangeably by HUD as Median Family Income and HUD Area Median Family Income.

For **application purposes**, the maximum rental rates for the moderate-income housing units are listed below. In the table below, fill in the number of moderate-income units by size (second column from the left) and the proposed rents for the moderate-income units (right-hand column). These rents should also be in the pro-formas submitted with the application.

Total Dwelling Units in Project: \_\_\_\_\_

Total Moderate-Income Units: \_\_\_\_\_

Moderate-Income Units as Percentage of Total Units: \_\_\_\_\_ % (must be at least 30%)

Unit Size	#	Maximum Rental Rate *	Proposed Rental Rate
Studio		\$1,123	\$
1 bedroom		\$1,283	\$
2 bedroom		\$1,443	\$
3 bedroom		\$1,603	\$
4 bedroom		\$1,733	\$
5 bedroom		\$1,860	\$

For **setting moderate-income rental rates after construction**: The AMI is likely to change each year and along with it the maximum rental rates. During the tax exemption, the moderate-income units will need to conform with the AMI in effect at the time each unit is leased and have rents at or below the maximum rates. Each year, City staff will make the maximum rental rates available. Owners will need to review the maximum rental rates before a lease is signed on the moderate-income units.

*\* Calculated from HUD FY18 data. Staff will update this column each year when HUD releases new AMI data.*

## Green Building Fact Sheet

	<b>Submit with Building Permit Application</b>	<b>Submit after Construction<sup>6</sup></b>
<i>LEED v4 for Homes</i>	Energy model	Within 18 months after receiving a Certificate of Occupancy, documentation of LEED certification (copy of USGBC Rating Certificate and final LEED review).
<i>Earth Advantage</i>	n/a	Within 18 months after receiving a Certificate of Occupancy: <ul style="list-style-type: none"> <li>• Documentation of Earth Advantage certification, and</li> <li>• Commissioning report.</li> </ul>
<i>City of Eugene BPS</i>	<ul style="list-style-type: none"> <li>• Signed Energy Release to enable the City to access multi-family occupancy energy use data for the life of the MUPTE</li> <li>• Energy model</li> </ul>	<ul style="list-style-type: none"> <li>• List the project features to achieve the 10% above code requirement.</li> <li>• Within 18 months after receiving a Certificate of Occupancy, commissioning report.</li> <li>• Annually during exemption if Energy Release not signed, multi-family occupancy energy use data.</li> </ul>

An improvement of at least 10% shall be demonstrated in the proposed building energy performance as compared to a similar baseline building designed in compliance with the prescriptive requirements of the Oregon Energy Efficiency Specialty Code. The proposed building performance and the baseline building performance shall be calculated in accordance with ANSI/ASHRAE/IESNA Standard 90.1–2010, Appendix G, with errata, using a simulation model. Projects must meet the minimum percentage savings before taking credit for renewable energy systems. The proposed design must include all energy consumption and costs within and associated with the building project.

Document the energy modeling input assumptions for unregulated loads. Unregulated loads should be modeled accurately to reflect the actual expected energy consumption of the building. If unregulated loads are not identical for both the baseline and the proposed building performance rating, and the simulation program cannot accurately model the savings, follow the exceptional calculation method (ANSI/ASHRAE/IESNA Standard 90.1–2010, G2.5). Alternatively, use the COMNET Modeling Guidelines and Procedures to document measures that reduce unregulated loads.

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<sup>6</sup> If this documentation is not timely submitted, MUPTE may be revoked.

## **INTENT**

To support the design, construction, and eventual operation of a project that meets the owner's and City of Eugene project requirements for energy and durability.

## **REQUIREMENTS**

*Commissioning Process Scope:* Complete the following commissioning (Cx) process activities for mechanical, electrical, and renewable energy systems and assemblies, in accordance with ASHRAE Guideline 0-2005 and ASHRAE Guideline 1.1-2007 for HVAC&R Systems, as they relate to energy, water, indoor environmental quality, and durability. The commissioning authority (CxA) must do the following:

- Review the OPR, BOD, and project design.
- Develop and implement a Cx plan.
- Confirm incorporation of Cx requirements into the construction documents.
- Develop construction checklists.
- Develop a system test procedure.
- Verify system test execution.
- Maintain an issues and benefits log throughout the Cx process.
- Prepare a final Cx process report.
- Document all findings and recommendations and report directly to the owner throughout the process.
- Provide a Final Report based on findings to the owner for delivery to the City of Eugene. At a minimum the report shall include: CxA qualifications, scope of commissioning activities, a list of systems commissioned (and by whom), a summary of issues corrected, and a list of major outstanding/unresolved issues.

Complete the following commissioning process (CxP) activities for the building's thermal envelope in accordance with ASHRAE Guideline 0-2005 and the National Institute of Building Sciences (NIBS) Guideline 3-2012, Exterior Enclosure Technical Requirements for the Commissioning Process, as they relate to energy, and durability. Commissioning authority must complete the following:

- Review contractor submittals.
- Verify inclusion of systems manual requirements in construction documents.
- Verify inclusion of operator and occupant training requirements in construction documents.
- Verify systems manual updates and delivery.
- Verify operator and occupant training delivery and effectiveness.
- Verify seasonal testing.
- Review building operations 10 months after substantial completion.
- Develop an on-going commissioning plan.
- Incorporate all findings into the Final Report provided to the owner for delivery to the City of Eugene.

*Commissioning Authority:* By the end of the design development phase, engage a commissioning authority with the following qualifications.

- The CxA must have documented commissioning process experience on at least two building projects with a similar scope of work. The experience must extend from early design phase through at least 10 months of occupancy;
- The CxA may be a qualified employee of the owner, an independent consultant, or an employee of the design or construction firm who is not part of the project's design or construction team, or a disinterested subcontractor of the design or construction team. For projects smaller than 20,000 square feet (1 860 square meters), the CxA may be a qualified member of the design or construction team. In all cases, the CxA must report his or her findings directly to the owner.



## **Contact Information**

AMANDA NOBEL FLANNERY  
ECONOMIC PROSPERITY PROGRAMS MANAGER

**Tel** 541-682-5535

**Fax** 541-682-5572

[amanda.nobelflannery@ci.eugene.or.us](mailto:amanda.nobelflannery@ci.eugene.or.us)

City of Eugene

Planning and Development Department

99 West 10<sup>th</sup> Avenue, Eugene, OR 97401

**Tel** 541-682-5086

**Fax** 541-682-5572

[www.eugene-or.gov/downtown](http://www.eugene-or.gov/downtown)

