

Methodology Report

Draft Parks System Development Charges

March 19, 2025



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Abbreviations and Acronyms

ACS	American Community Survey
ADU	Accessory Dwelling Unit
BPRD	Bend Park and Recreation District
ENR	Engineering News Record
LOS	Level of Service
OHAS	Oregon Household Activity Survey
ORS	Oregon Revised Statute
PUMS	Public Use Microdata Sample
RLIS	Regional Land Information System
SDC	System Development Charge
SE	Southeast
SQ FT	Square Feet

SECTION 1

1 Introduction

1.1 Authorization

In August 2024, the Bend Park & Recreation District (District or BPRD) contracted with Galardi Rothstein Group to update its System Development Charge (SDC) methodology. This report presents the updated methodology that was developed in conformance with Oregon legal requirements, standard industry practice, and the District's policy objectives and comprehensive plan.

1.2 Report Organization

This section presents information on the District's SDC project objectives, and the policy and legal framework for the methodology. Subsequent sections of this report present the SDC methodology, including:

- **Section 2 – SDC Cost Basis** – Presents the current and future levels of service used to determine growth capacity needs, and the growth-related costs in aggregate based on the updated SDC project list.
- **Section 3 – SDC Assessment** – Provides information on system-wide unit costs per person, assumptions of number of persons per dwelling unit, and the process for determining future inflationary adjustments.

Separate from the methodology, the District will adopt by resolution the following items which are included in the appendix of this report:

- **Appendix A – SDC Project List** – Provides the list of projects needed to increase park, trails, and recreation system capacity for future growth, which are to be funded with SDC revenue. The list includes the project description, and the estimated cost, timing, and portion of cost eligible for SDC funding.
- **Appendix B – SDC Schedule** – Provides the results of the regression analysis used to estimate persons per dwelling for different sizes of single-family residential homes, which forms the basis for a tiered SDC fee structure. Also lists SDCs by development type, based on the methodology and project list presented in this report. Consistent with Oregon law and the District's SDC ordinance, the fees presented in Appendix B may be adjusted periodically for changes in costs or changes in the project list.

Note: The calculations contained in this report were produced by computer spreadsheets where numbers extend beyond the decimal places shown in the tables presented, so slight variations exist due to rounding. However, these variations are not material.

1.3 Background

System development charges are an important funding source for parks, trails, and recreation facility capital improvement projects. The District last updated its SDC methodology in 2019. In November 2024, the District adopted the *Bend Park & Recreation District Comprehensive Plan: 2024 Midterm Update* (comprehensive plan) and subsequently embarked on an effort to update the parks SDC methodology. The primary objective of the SDC update is to revise the project list and SDC calculations to reflect the new comprehensive plan project priorities and levels of service.

1.4 Policy Framework

Oregon legislation (Oregon Revised Statutes 223.297-314) establishes guidelines for the calculation and administration of SDCs. Within these guidelines, local governments have latitude in selecting approaches that best align with local policy objectives.

The updated methodology presented in this report reflects prior feedback from stakeholders (obtained during the 2019 SDC update) through a combination of facilitated stakeholder group meetings, written comments, and discussions with individual stakeholders and the District Board of Directors. Key elements of the 2025 methodology are summarized in Table 1-1 below and generally align with the 2019 SDC methodology.¹ The 2025 SDC methodology does reflect some modification to the way residential SDCs are assessed, to align with recent changes made by the City of Bend (City) for its water, sewer, and transportation SDCs. The City assesses the parks SDC on behalf of the District for new development within the City limits. Greater consistency between the City and District methodologies streamlines administration and improves customer understanding.

Table 1-1. Key Elements of the Methodology

Methodology Element	Recommendations	Considerations
Growth Cost Allocation	Allocate costs to residents plus overnight visitors.	A 2019 stakeholder process showed a lack of support for assessment of SDCs on commercial development due to concerns related to administrative complexity and other factors.
Residential SDC Assessment	Scale SDCs based on dwelling size for single-family residential based on six (6) living area size tiers. Charge multifamily and other housing and visitor accommodation units based on a flat rate per unit.	Statistical analysis of local data shows average occupancy increases with size of single-family homes. The six-tier structure is consistent with the City of Bend's SDC structures. Implementation issues differ between single-family and other units; The City of Bend uses a uniform rate per unit for multifamily housing.

¹ The 2019 SDC Methodology is documented in the "Methodology Report Parks System Development Charges", Adopted June 4, 2019 (Galardi Rothstein Group, Clifton-Currans, LLC, and Kearns & West).

1.5 Legal Framework

Oregon Revised Statutes (ORS) 223.297 through 223.316 authorize local governments to assess SDCs for the following types of capital improvements:

- Drainage and flood control (i.e., storm water)
- Water supply, treatment, and distribution
- Wastewater collection, transmission, treatment, and disposal
- Transportation
- Parks and recreation

In addition to specifying the infrastructure systems for which SDCs may be assessed, the SDC legislation provides guidelines on the calculation and modification of SDCs, accounting requirements to track SDC revenues, and adoption of administrative review procedures. Key elements of provisions that pertain to the methodology and project list are summarized below.

1.5.1 SDC Structure

An SDC may include a reimbursement fee, an improvement fee, or a combination of the two.

1.5.1.1 Reimbursement Fee

The reimbursement fee is based on the value of available capacity associated with capital improvements already constructed or under construction. The methodology used to calculate the reimbursement fee must consider the cost of existing facilities, prior contributions by existing users, the value of unused capacity, grants, and other relevant factors. The objective of the reimbursement fee methodology is to require new users to contribute an equitable share of the capital costs of existing facilities.

1.5.1.2 Improvement Fee

The improvement fee is designed to recover the costs of planned capital improvements that add system capacity to serve future users. An increase in system capacity may be established if a capital improvement increases the level of performance or service provided by existing facilities or provides new facilities. The portion of the improvements funded by improvement fees must be related to the need for increased capacity to provide service for future users.

1.5.2 Project List

Local governments are required to prepare a capital improvement program or comparable plan, prior to establishment of an SDC, that includes a list of the improvements that the jurisdiction intends to fund with improvement fee revenues and the estimated timing, cost, and eligible portion of each improvement. The project list may be updated at any time. If an SDC is to be increased by a proposed modification to the list, then required action includes: (1) written notice provided to interested parties at least 30 days prior to adoption of the proposed modification and (2) hold a public hearing on the proposed modification if a request is received in writing up to seven days before the date of the planned adoption.

1.5.3 Credits

A credit must be provided against the improvement fee for the construction of “qualified public improvements.” Qualified public improvements are improvements required as a condition of development approval, identified in the system’s capital improvement program, and either (1) not located on or contiguous to the property being developed or (2) located in whole or in part,

on or contiguous to, property that is the subject of development approval and required to be built larger or with greater capacity than is necessary for the particular development project to which the improvement fee is related.

1.5.4 Methodology Review and Notification Requirements

The methodology for establishing or modifying improvement or reimbursement fees must be available for public review prior to adoption. The local government must maintain a list of people who have made a written request for notification prior to the adoption or amendment of such fees that are resultant of a methodology amendment. The requirements for any changes to the fees that represent a modification to the methodology are: (1) 90-day written notice prior to the first public hearing, and (2) SDC methodology made available for review 60 days prior to the public hearing.

Application of one or more cost indices periodically is allowable and is not considered a change in the methodology and is therefore not subject to the above review and notification procedures, provided that the index is published by a recognized agency, independent from the methodology, and incorporated into the methodology or adopted separately by ordinance or resolution. Furthermore, “a change in the costs of materials, labor, or real property as applied to projects or project capacity”² in the adopted project list is not considered a modification to the SDC methodology. As such, the local government is not required to adhere to the methodology notification provisions.

1.5.5 Other Provisions

Other provisions of the legislation include:

- Deposit of SDC revenues into dedicated accounts and annual accounting of revenues and expenditures, including a list of the amount spent on each project funded, in whole or in part, by SDC revenues.
- Expenditure of SDCs may include costs of complying with the provisions of the law, including costs of developing SDC methodologies and providing an annual accounting of SDC expenditures.
- Creation of an administrative appeals procedure, in accordance with the legislation, whereby a citizen or other interested party may challenge an expenditure of SDC revenues. Furthermore, in the event a written objection to the calculation of an SDC is received, the local government must provide information on the right to petition for review pursuant to ORS 34.010, and about any locally adopted administrative review procedures.

² 2017 Oregon Revised Statutes 223.304 (8)(b)(A)

SECTION 2

2 SDC Cost Basis

2.1 Introduction

The methodology used to calculate parks SDCs begins with the determination of growth costs (the costs in aggregate associated with meeting the capacity needs of future growth).

This section presents the projected future growth needs and the basis for determining the costs that will be recovered from growth through the SDCs (growth share).

2.2 Level of Service

The District – through adoption of the comprehensive plan – is planning for acquisition and development of the park system consistent with the community’s desired level of service (LOS). As identified in the comprehensive plan, LOS targets include both access goals (neighborhood/community parks within ½ mile walking distance of all residences) and park quantity goals (e.g., acres per thousand population). Both goals are considered in the development of the specific projects included on the SDC project list. However, for purposes of determining growth’s share of project list costs, the SDC methodology focuses on the planned LOS for a particular park or facility as defined by the equation below:

$$\frac{\text{Existing } Q + \text{Planned } Q}{\text{Future Population Served}} = \text{Planned LOS}$$

Where:

Q = quantity (acres of parks, miles of trails, or area of facilities) and

Future Population Served = projected 2034 resident population + overnight visitors

2.2.1 Population

Park capacity is measured in terms of people served; in the case of the SDC methodology this includes service area resident population and nonresident overnight visitors.

Table 2-1 provides resident and overnight visitor population data derived from recent planning documents and other data sources.

Table 2-1. Service Area Population Estimates

Item	2024	2034	Growth
Population ¹	106,395	139,440	33,045
Overnight Visitors ²	6,827	8,948	2,120
Total Population	113,222	148,388	35,165

¹ From BPRD

² Current accommodations from Visit Bend; visitors based on 2.63 average people per unit and 71.2% 6 mos. Average occupancy (Dean Runyan Associates)

For purposes of the SDC analysis, the overnight visitor population is calculated as the number of traveler accommodation units multiplied by an average of 1.87 occupants per room (2.63 people per room adjusted for an average occupancy rate of 71.2 percent).³ Consistent with the current methodology and other Oregon communities, overnight visitors, while visiting the District, are assumed to equal residents in terms of potential for park use.

2.2.2 Current and Future LOS

The comprehensive plan identifies the following park classifications that are included in the SDC analysis:

- Neighborhood & Community Parks
- Regional Parks
- Trails
- Indoor Recreation Facilities

Table 2-2 summarizes existing and planned future park quantities for each classification in order to calculate the existing and future LOS and SDCs.

The comprehensive plan identifies planned projects designed to generally maintain the future LOS for all existing and future park users. Table 2-2 shows the planned additional quantities resulting from the projects included on the SDC project list shown in Appendix A.

Table 2-2. Summary of Existing and Planned Parks, Trails, and Facilities¹

Type	Unit Type	Existing Developed Units	Planned Development Units		Total Future Developed Units
			Acquired Units ¹	Existing Undeveloped Units ²	
Parks					
Neighborhood & Community	Acres	809.8	128.0	13.8	951.6
Regional	Acres	1,148.3	0.0	226.5	1,374.8
Trails	Miles	88.3	22.4	0.0	110.7
Indoor Recreation Facilities	SQ FT	190,544	54,800	0.0	245,344

¹ Based on new parks from SDC project list (Table A-1)

² Owned by the District and planned for development within the planning period. Regional park based on 50 percent of the total existing undeveloped acreage for SE Bend Regional Park.

Table 2-3 shows the existing and future LOS (developed units per 1,000) by park type. The future LOS is marginally lower than the existing LOS due to the significant population growth projected through 2034. The District may acquire and develop additional parks and trails beyond those included in the SDC project list with other non-SDC funding sources, to maintain the LOS targets established in the comprehensive plan.

³ Average people per unit represents an average of hotel/motel accommodations and other overnight accommodation types (including camping), weighted based on traveler days by unit type. The average occupancy rate is based on a 6-month average (April-September).

Table 2-3. Existing and Planned Levels of Service (Units per 1,000)

Type	Unit Type	Developed Units/1,000 Population ¹	
		Existing	Future ²
Parks			
Neighborhood & Community	Acres	7.15	6.41
Regional	Acres	10.14	9.26
Trails	Miles	0.78	0.75
Indoor Recreation Facilities	SQ FT	1,683	1,653

¹ Existing and total future park quantities (Table 2-2) divided by 2024 and 2034 total population per 1,000 (from Table 2-1)

²Based on improvements from SDC project list only (Table A-1)

2.2.3 Implications for SDC Cost Basis

The LOS analysis provides a basis for determining the capacity needs of growth by park type in order to determine an equitable share of project list costs (for purposes of development of the improvement fee cost basis) and capacity available in the existing system to meet growth's needs (for purposes of the reimbursement fee cost basis).

Table 2-4 provides a summary of the capacity analysis. It begins with determination of park units needed by 2034 based on the planned LOS (Table 2-3) and the 2034 population (Table 2-1). Then, the source of the units – existing system inventory and planned improvements from the project list – is identified for each park classification. In the current planning period, existing development needs are fully met by the existing inventory of parks and facilities since the planned LOS is lower than the existing LOS.

Table 2-4. Capacity Needs – Developed Acreage, Trails and Recreation Facilities

Type	Unit Type	Total Units Needed ¹	Units From Existing Inventory ²	Units From Project List ³	Project List Allocation (%) ⁴
Parks			Future Growth Units		
Neighborhood & Community	Acres	225.5	83.7	141.8	100.0%
Regional	Acres	325.8	99.3	226.5	100.0%
Trails	Miles	26.2	3.8	22.4	100.0%
Indoor Recreation Facilities	SQ FT	58,143	3,343	54,800	100.0%
Parks			Existing Development Units		
Neighborhood & Community	Acres	726.1	726.1	0.0	0.0%
Regional	Acres	1,049.0	1,049.0	0.0	0.0%
Trails	Miles	84.5	84.5	0.0	0.0%
Indoor Recreation Facilities	SQ FT	187,201	187,201	0.0	0.0%
Parks			Total Units		
Neighborhood & Community	Acres	951.6	809.8	141.8	100%
Regional	Acres	1,374.8	1,148.3	226.5	100%
Trails	Miles	110.7	88.3	22.4	100%
Indoor Recreation Facilities	SQ FT	245,344	190,544	54,800	100%

¹ Future LOS (Table 2-3) x Population/1,000 (Table 2-1)

² Existing inventory (from Table 2-2 Existing Developed Units) first meets needs of existing development; any excess capacity available to meet growth needs

³ Total need, less units from existing inventory

⁴Equal to number of units needed from project list divided by total project list additional units (Table 2-2)

Growth's needs will be met by a combination of future planned improvements, and the available capacity in existing developed park acreage and facilities.

2.3 Improvement Fee Cost Basis

The project list allocation percentages by park type shown in Table 2-4 are applied to the planned project improvement costs from the project list (shown in Table A-1) to determine the total costs to be recovered from growth through the improvement SDC.

The improvement fee cost basis is limited to the costs of new parks, trails and facilities that are needed to meet the needs of future development (Table A-1). Existing available SDC funds (collected from what is now existing development) will be used to fund capacity improvements at existing parks; these improvements are shown in Appendix A, Table A-2, and are excluded from improvement fee costs shown in Table 2-5. The improvement fee cost basis is reduced by existing remaining SDC fund balance committed to projects on the A-1 project list.

Table 2-5 shows the development of the improvement fee cost basis for new parks and facilities based on the total costs by park type from the project list (Table A-1). The SDC share by park type is based on the project cost allocations shown in Table 2-4. The total improvement fee cost basis for the new SDCs is about \$101.3 million.

Table 2-5. Improvement Fee Cost Basis

Project Types	Total Project Costs ¹	New SDC %	New SDC \$	Existing SDC \$
New Park/Facilities				
Community Parks	\$252,512	100%	\$252,512	\$0
Neighborhood Park	\$46,533,064	100%	\$46,533,064	\$0
Regional Park ²	\$10,716,756	100%	\$10,716,756	\$0
Recreation Facilities ³	\$46,388,032	100%	\$46,388,032	\$0
Trails	\$9,837,478	100%	\$9,837,478	\$0
Less Existing SDC Fund Balance			-\$12,416,585	\$12,416,585
Subtotal	\$113,727,843		\$101,311,258	\$12,416,585
Capacity Imp - Existing Parks				
New or expanded amenities & access	\$1,352,457			\$1,352,457
Improved level of performance/development	\$9,030,959			\$9,030,959
Subtotal	\$10,383,415		\$0	\$10,383,415
Total	\$124,111,258		\$101,311,258	\$22,800,000

¹ Costs from SDC project list (Appendix A, Table A-1).

² Includes 50% of Rose Property Development (other 50% serves future growth beyond 2034)

³ Includes Westside Recreation Center and Arts Center.

2.4 Reimbursement Fee Cost Basis

As shown in Table 2-4, growth's capacity needs will be met in part by existing parks and facilities, including: 1) prior acquisition of parkland that will be developed by the District during the 10-year planning period, and (2) prior development of parks and facilities that will meet capacity need for growth through existing available capacity. The reimbursement fee cost basis is summarized in Table 2-6 and totals \$67.3 million.

Table 2-6. Reimbursement Fee Cost Basis

Park Type	Growth Units from Existing Inventory		Unit Costs (\$/Unit)		Growth Costs		
	Exist Acres ¹	Dev. Acres	Aquis. (\$/acre) ²	Devel. (\$/unit) ²	Acquis. \$ ³	Devel. \$	Total \$
Neigh & Com - Land	97		\$221,902		\$19,520,607	--	\$19,520,607
Neigh & Com - Dev		84		\$459,938		\$38,492,856	\$38,492,856
Regional - Land	326		\$8,638		\$1,012,039	--	\$1,012,039
Regional - Dev		99		\$45,495		\$4,517,328	\$4,517,328
Trail Development		4		\$231,892		\$886,131	\$886,131
Indoor Rec Facilities		3,343		\$846		\$2,829,430	\$2,829,430
Total					\$20,532,647	\$46,725,745	\$67,258,392

¹ Includes existing undeveloped acreage (N&C =Manzanita Ridge, Hansen, Coulter; Regional = Rose Property)

² Based on recent purchases & development \$/acre for Rose (Regional) and Alpenglowl, Little Fawn, Northpoint, and Fieldstone and Goodrich (N&C); trail \$/mile and recreation facilities (\$/SQ FT) based on project list.

³ Excludes outstanding bond principle associated with 2012 purchases of community and regional park land.

2.5 SDC Compliance Costs

Local governments may spend SDCs on the costs of complying with the SDC statutes. Compliance costs include costs related to developing the SDC methodology and project list, as well as annual accounting, budgeting, and legal costs.

Table 2-7 shows the calculation of the estimated compliance costs based on a 10-year planning period. As shown in Table 2-7, the estimated compliance costs include 50 percent of the comprehensive plan costs (associated with development of the project list and other information needed for the SDC methodology).

Table 2-7. SDC Compliance Costs

Component	Total Costs ¹	Growth	
		%	\$
Comprehensive Plan	\$195,000	50%	\$97,500
Accounting, Budgeting, Legal	92,891	100%	\$92,891
SDC Methodology Update	159,500	100%	\$159,500
Total	\$447,391		\$349,891

¹10-year planning period

Other compliance costs include District administration costs associated with accounting, budgeting, legal, external costs for SDC consulting, and auditing. Total compliance costs over the 10-year planning period are estimated to be approximately \$350,000.

SECTION 3

3 SDC Assessment

3.1 Introduction

Once the aggregate growth costs have been determined, the next step in the methodology is to determine how the SDCs will be assessed to individual developments.

The SDC for an individual development is based on the system-wide unit cost per person and the number of people attributable to a particular development. This section presents the system-wide unit costs, and the assumptions related to estimated people per dwelling unit for different residential development types.

3.2 System-wide Unit Costs (\$/Person)

The growth in total population (35,165) is divided into the growth costs described in Section 2 to determine the costs per unit, as shown in Table 3-1.

Table 3-1. System-wide Unit Costs/Person

Component	Cost Basis ¹	\$/Person	% of Total
Improvement SDC Cost Basis	\$101,311,258	\$2,881	60%
Reimbursement SDC Cost Basis	67,258,392	1,913	40%
SDC Compliance Costs	349,891	10	<1%
Bond Credit ²		-40	-1%
Total	\$168,919,541	\$4,763	100%

¹From Tables 2-5, 2-6, and 2-7

²Present value of future annual debt payments per person associated with recreation facilities

3.2.1 Bond Credit

The District issued a general obligation bond in 2012 to pay for a limited number of park improvements. The portion of outstanding bond funds associated with community and regional parks was deducted directly from the reimbursement fee cost basis.

The District also funded a portion of existing indoor recreation facilities (The Pavilion) with bond funds. Since the SDC project list includes indoor facility costs associated with future growth, a credit is provided against the total SDCs for the portion of outstanding bond principal associated with existing indoor recreation facility investments⁴. The credit is calculated as the present value of future bond principal costs per person and equals \$40, as shown in Table 3-1.

⁴ As of the end of fiscal year 2025, the District will have paid \$12.9 million (42%) of the total \$30.6 million in bond principal owed. Recreation facility costs represent about 38% (\$11.6 million) of total bond costs; therefore, the credit is based on a present value of 38% of future bond principal payments (about \$6.0 million to be paid over 8 years).

3.2.2 Total Costs per Person

The total growth cost to be recovered through SDCs is about \$169.0 million as shown in Table 3-1. Each component of the growth cost is divided by the total growth in population during the planning period (35,165 as shown in Table 2-1) to determine the SDC cost per person. The combined cost per person, net of the bond credit, is \$4,763, shown in Table 3-1.

3.2.3 Administrative Costs

Separate from the compliance and infrastructure costs discussed in Section 2, the District incurs other costs associated with administration of the SDC program. These costs include both internal administration as well as payments to the City of Bend and Deschutes County for assessment and collection of the SDCs. The administrative costs are established by each entity and are in addition to the costs per person shown in Table 3-1. Administrative costs are reviewed periodically by each entity separate from the SDC methodology update process, and as such are adopted and modified by resolution.

3.3 Development Occupancy Assumptions

SDCs are assessed to different development types based on average dwelling and visitor unit occupancy. Local, regional, and national data were analyzed, and the results show that the typical household size (i.e., people per dwelling unit) varies by the size of the housing unit (as measured by quantity of living space) and the type of unit (single family, multifamily, and mobile or manufactured homes).

For this analysis, “local” data refers to information for the City of Bend, Oregon, and/or Deschutes County, depending on the data set. The “single family” analysis was conducted specifically on data for single-family detached units, while multifamily reflects analysis for structures with two or more attached units.

3.3.1 Single-Family Residential

For the 2019 SDC Methodology, U.S. Census data, specifically, from the American Community Survey (ACS) Public Use Microdata Sample (PUMS) for Deschutes County were used to estimate occupancy for all single-family residential dwelling units, which as shown in Table 3-2, averages 2.5 persons per dwelling unit.

Table 3-2. Single-Family Dwelling Unit Occupancy

Category	Avg. People per Dwelling Unit ¹
<i>Single-Family (Avg.)</i>	2.50
<=600 SQ FT	1.75
601 - 1,200 SQ FT	2.01
1,201 - 1,600 SQ FT	2.22
1,601 - 2,200 SQ FT	2.37
2,201 - 3,000 SQ FT	2.51
>3,000 SQ FT	2.74

¹From 2019 SDC Methodology regression analysis

In addition, Oregon Household Activity Survey (OHAS) data collected within the BPRD Tax District in 2011, the most recent survey available, were used to develop a tiered SDC structure, based on dwelling unit size, as measured by square footage. The OHAS data were spatially

linked to tax lot and improvement information for a similar year (2012) from the Regional Land Information System (RLIS), allowing for locally derived estimates of people per dwelling unit to be calculated for different square footage categories⁵.

Initially, a four-tier structure was adopted by the District based on feedback from stakeholders. More recently, the City of Bend adopted SDC methodologies based on the six-tier structure shown in Table 3-2. The development of the six-tier structure reflects more recent stakeholder feedback and changes to the City's development code and housing types. The occupancy assumptions shown in Table 3-2 are based on the linear-logarithmic regression analysis⁶ developed as part of the 2019 SDC Methodology and shown in Table B-1 in Appendix B. The averages within each tier were used to develop the occupancy estimates by tier shown in Table 3-2.

3.3.2 Multifamily Residential

As with single-family residential, U.S. Census data were used to estimate occupancy for all multifamily residential dwelling units, which as shown in Table 3-3, averages 1.78 persons per dwelling unit.

Table 3-3. Multifamily Dwelling Unit Occupancy

Category	Avg. People per Dwelling Unit
All Multifamily Dwelling Sizes ¹	1.78

¹ 2020 ACS PUMS for Deschutes County, weighted average for all multifamily households

3.3.3 Other Housing

Table 3-4 presents occupancy assumptions for other types of housing. Occupancy for mobile homes is based on 2017 ACS data for Deschutes County. Accessory Dwelling Units (ADUs) will be assessed based on the same occupancy as the smallest multifamily residential category (0 bedrooms).

Table 3-4. Occupancy Assumptions - Other Housing

Category	Avg. People per Unit
Mobile homes (per home) ¹	2.26
Accessory Dwelling Units (per unit) ²	1.08

¹ 2017 ACS for Deschutes County

² Based on Multifamily 0 bedrooms (2019 SDC Methodology)

Residential occupancy for dormitories will be estimated on the per person cost basis for each individual development at the time of permitting. Developments that provide housing for

⁵ Based on square footage of the home (excluding garages or structures outside the living area of the home). As defined by the Deschutes County Assessor's Office, household living area also includes basement and attic area.

⁶ A linear-logarithmic relationship assumes that the rate of change (or number of people) increases initially but then levels off once the dwelling reaches a certain size.

those wholly dependent upon care by others, such as memory care facilities, will be exempt from paying an SDC.

3.3.4 Overnight Visitors

Occupancy assumptions for overnight visitor accommodations are based on estimated persons per guest unit of 2.63⁷, adjusted for an average April-September lodging occupancy rate of 71.2 percent, based on a 2-year historical average (2023-2024) from Visit Bend Lodging Occupancy Report. The resulting persons per guest unit is 1.87.

3.4 SDC Schedule

The SDC for each development type is determined by multiplying the net cost per person from Table 3-1 by the average number of people per unit for each development type.

Table B-2 in Appendix B includes the updated SDCs and occupancy assumptions for each residential category. As discussed previously, administration charges adopted by Board resolution are added to the SDCs; Table B-2 also shows the SDCs inclusive of the District and other agency (City of Bend and Deschutes County) administration costs of about 1.3 percent, combined.

3.4.1 Inflationary Adjustments

As allowed by Oregon law, the District will annually update the SDCs by resolution based on application of cost indices. The SDC project list includes a combination of land acquisition and development costs; therefore, the District will use information published by the Deschutes County Assessor's Office and the Engineering News Record (ENR) U.S. 20-City Average Construction Cost index to determine the annual inflationary adjustment.

The inflationary adjustment will be based on the following formula:

Annual percent change in ENR Construction Cost index x percent of project list costs for development +
Annual percent change in land value within the District x percent of project list costs for land acquisition

The specific percentages attributable to land and development will change as the SDC project list changes; therefore, the District may implement modifications to the inflationary adjustment formula through adoption of separate future resolution(s). The cost components of the current project list are development (85%) and land acquisition (15%).

The District intends to base the adjustment on the ENR index published for December of each year. Land costs will be based on the market value of all real property, adjusted for the estimated value of improvements added, as reported by the Assessor's Office annually in the fall.

The District may make future changes to the inflationary adjustment process, assumptions and cost indices through adoption of a separate Board resolution.

⁷ Average people per guest unit represents an average of hotel/motel accommodations and other overnight accommodation types (including all types of camping), weighted based on traveler days by unit type. Source: *The Economic Impact of Travel in Bend*, prepared by Dean Runyan Associates (2022 and 2023).

APPENDIX A

Appendix A - SDC Project List

Table A-1. SDC Project List - New Parks, Facilities and Trails (2024-2034)¹

Project Name	Project Description	Timeline	Quantity	Unit	Improvement SDC	
		(Years)			Cost (\$)	%
NEIGHBORHOOD PARKS						
Manzanita Ridge	New park development	1-5	4	acres	\$1,287,076	100%
Coulter	New park development	1-5	4	acres	\$1,803,300	100%
Talline	New park land acquisition & development	1-5	4	acres	\$1,563,719	100%
Parkside Place	New park land acquisition & development	1-5	4	acres	\$2,242,687	100%
Easton	New park land acquisition & development	1-5	4	acres	\$2,193,599	100%
Stevens Ranch	New park land acquisition & development	1-5	4	acres	\$1,735,474	100%
Discovery West	New park land acquisition & development	1-5	4	acres	\$2,872,967	100%
Fields Farm	New park land acquisition & development	1-5	4	acres	\$2,473,098	100%
Pinebrook	New park land acquisition & development	1-5	3	acres	\$1,545,686	100%
Murphy Crossing	New park land acquisition & development	1-5	4	acres	\$1,777,539	100%
Constellation Crest	New park land acquisition & development	1-5	4	acres	\$2,975,961	100%
Caraway	New park land acquisition & development	1-5	4	acres	\$103,046	100%
Park Search Area 21 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$1,030,457	100%

Table A-1. SDC Project List - New Parks, Facilities and Trails (2024-2034)¹

Project Name	Project Description	Timeline	Quantity	Unit	Improvement SDC	
		(Years)			Cost (\$)	%
Park Search Area 6 - Neighborhood Park	New park land acquisition & development	1-5	4	acres	\$3,091,372	100%
Park Search Area 29 - Neighborhood Park	New park land acquisition & development	1-5	4	acres	\$2,721,242	100%
Park Search Area 13 - Neighborhood Park	New park land acquisition & development	1-5	4	acres	\$2,721,242	100%
Park Search Area 16 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$2,721,242	100%
Park Search Area 17 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$2,721,242	100%
Park Search Area 19 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$2,721,242	100%
Park Search Area 31 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$2,721,242	100%
Park Search Area 33 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$2,721,242	100%
Park Search Area 34 - Neighborhood Park	New park land acquisition & development	1-5	4	acres	\$2,721,242	100%
Park Search Area 36 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$2,721,242	100%
Park Search Area 37 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$2,721,242	100%
Park Search Area 38 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$2,721,242	100%
Park Search Area 41 - Neighborhood Park	New park land acquisition & development	1-5	4	acres	\$2,721,242	100%
Park Search Area 8 - Neighborhood Park	New park land acquisition & development	6-10	4	acres	\$2,721,242	100%
Subtotal			107.0		\$46,533,064	
COMMUNITY PARKS						

Table A-1. SDC Project List - New Parks, Facilities and Trails (2024-2034)¹

Project Name	Project Description	Timeline		Unit	Improvement SDC	
		(Years)	Quantity		Cost (\$)	%
Park Search Area 35 - Community Park (Future UGB)	New park development	6-10	29	acres	\$252,512	100%
Subtotal			29		\$252,512	
RECREATION FACILITIES						
Westside Recreation Center Planning and Infrastructure	Infrastructure contribution & preliminary planning	1-5	NA		\$749,076	100.0%
Westside Recreation Center	New Recreation Center (Construction)	6-10	50,000	SQ FT	\$41,218,294	100.0%
Art Station	Construction (expanding capacity of Art program on larkspur site)	1-5	4,800	SQ FT	\$4,420,662	100.0%
Subtotal			54,800		\$46,388,032	
REGIONAL PARKS						
Rose Property Concept Planning	Concept planning for park development	2-3			\$412,183	100%
Rose Property Development	50% of park development	6-10	226.6	Acres	\$10,304,574	100%
Subtotal			226.6		\$10,716,756	
TRAILS						
2- Bend Lava Trail (Formerly Arnold Canal Trail)	New trail development	6-10	2.30	miles	\$496,845	100.0%
1- 12th Street Crossing	Road Crossing	6-10	-	miles	\$77,284	100.0%
11- Discovery Trail	New trail development	6-10	0.82	miles	\$401,532	100.0%
13- High Desert Trail	New trail development	1-5	1.30	miles	\$636,575	100.0%
15- High Desert Trail Undercrossing at Knott Rd/27th Street	Under crossing	1-5	-	miles	\$1,545,686	100.0%
17- North Unit Canal Trail	New trail development	1-5	3.10	miles	\$252,998	100.0%

Table A-1. SDC Project List - New Parks, Facilities and Trails (2024-2034)¹

Project Name	Project Description	Timeline	Quantity	Unit	Improvement SDC	
		(Years)			Cost (\$)	%
20- Pilot Butte Canal Trail	New trail development	1-5	1.00	miles	\$81,612	100.0%
23- Riley Ranch Nature Reserve Bike/Pedestrian Bridge	Bridge	1-5	-	miles	\$1,030,457	100.0%
24- Shevlin Park North - Tumalo Creek Bike/Pedestrian Bridge	Bridge	1-5	-	miles	\$128,807	100.0%
25- Simpson Avenue Crossing	Road Crossing	1-5	-	miles	\$77,284	100.0%
26- Skyliners Road at NW Crossing Drive	Road Crossing	1-5	-	miles	\$77,284	100.0%
27- TransCanada Trail	New trail development	1-5	0.92	miles	\$300,333	100.0%
4- Big Sky Trail	New trail development	1-5	0.20	miles	\$175,219	100.0%
5- Big Sky Trail Undercrossing at Hwy 20	Under Crossing	1-5	-	miles	\$1,545,686	100.0%
6B-Central Oregon Historic Canal Trail - Reed Market Rd to Hansen Park	New trail development	1-5	1.32	miles	\$107,728	100.0%
6C- Central Oregon Historic Canal Trail - Hansen Park to Eastgate Park	New trail development	6-10	3.61	miles	\$371,904	100.0%
9A- DRT Connector to Shevlin Park	New trail development	6-10	0.85	miles	\$27,748	100.0%
9B- DRT Kirkaldy Court to Putnam Road	New trail development	1-5	0.14	miles	\$4,570	100.0%
9C- Deschutes River Trail (DRT) Putnam to Riley Ranch Nature Reserve	New trail development	1-5	1.34	miles	\$43,744	100.0%
9D- DRT Galveston to Miller's Landing	New trail development	1-5	0.31	miles	\$725,030	100.0%
9E- DRT from COHCT to River Canyon Natural Area	New trail development	1-5	1.20	miles	\$123,696	100.0%
Deschutes River Trail Alternatives	Analysis & Prelim Feasibility	1-5	-	miles	\$254,781	100.0%
Trail Acquisition, Safety and Crossings	New trail development	1-5	4.00	Miles	\$1,350,672	100.0%
Subtotal			18.4		\$9,837,478	
GRAND TOTAL					\$113,727,843	

Deschutes River Trail (DRT)

¹ Total costs reflect park development costs = 85% and land acquisition costs = 15%.

Table A-2. SDC Project List - Capacity Improvements to Existing Parks; New Recreation Facilities and Trails (2024-2034)

Project Name	Project Description	Timeline (Years)	SDC Eligible ¹ \$
IMPROVED LEVEL OF PERFORMANCE / DEVELOPMENT			
Big Sky Park Expansion Phase 2	Bike park and amenities	1-5	\$864,396
Hansen Park Trailhead	New trailhead development	6-10	82,505
Park Search Area 3 - DRT North Trailhead	New trailhead development	1-5	342,435
Pine Nursery Park Phase 4 (Pending Partnership)	New fields	1-5	51,523
Pine Nursery Park Phase 5	Development of existing acreage	1-5	7,963,954
NEW OR EXPANDED AMENITIES OR ACCESS			
Hollinshead Park Master Plan and Renovation	Renovation	1-5	267,527
Park Search Area--Neff and Hamby Rd. Crossings	New pedestrian street crossing	6-10	10,701
Ponderosa Master Plan and Renovation	Park redevelopment	1-5	374,538
River Access at Riverbend Park	Refine and Improve access for river users	1-5	249,371
Farewell Bend Park - North Beach Enhancements	Refine and Improve access for river users	6-10	145,294
Farewell Bend Park (North)	Improve access and boat launch at the north end of park	6-10	31,171
GRAND TOTAL			\$10,383,415

¹ From existing SDC fund balance.

APPENDIX B

Appendix B - SDC Schedule

Table B-1. Estimated People Per Household – Single Family Residential

Square Feet	Est. People per Household LIN-LOG Regression	6-Tier Structure
500	1.71	1.75
600	1.79	
700	1.87	
800	1.93	2.01
900	1.99	
1000	2.04	
1100	2.09	
1200	2.13	
1300	2.17	2.22
1400	2.21	
1500	2.24	
1600	2.27	
1700	2.30	2.37
1800	2.33	
1900	2.35	
2000	2.38	
2100	2.40	
2200	2.43	2.51
2300	2.45	
2400	2.47	
2500	2.49	
2600	2.51	
2700	2.52	
2800	2.54	
2900	2.56	2.74
3000	2.58	
3100	2.59	
3200	2.61	
3300	2.62	
3400	2.64	
3500	2.65	
3600	2.66	
3700	2.68	
3800	2.69	
3900	2.70	
4000	2.72	
4100	2.73	
4200	2.74	
4300	2.75	
4400	2.76	
4500	2.77	
4600	2.78	
4700	2.79	
4800	2.80	
4900	2.81	
5000	2.82	
5100	2.83	
5200	2.84	
5300	2.85	
5400	2.86	
5500	2.87	

Table B-2. SDC Schedule

Development Type	Avg. People per Unit	SDC ¹	SDC w/Admin Charges ²
Single Family ³ Avg. (\$/dwelling unit)	2.50	\$11,908	\$12,063
SQ FT Tiers (\$/dwelling unit)			
<=600 SQ FT	1.75	\$8,335	\$8,444
601-1,200 SQ FT	2.01	\$9,574	\$9,699
1,201 - 1,600 SQ FT	2.22	\$10,574	\$10,712
1,601 - 2,200 SQ FT	2.37	\$11,288	\$11,436
2,201 - 3,000 SQ FT	2.51	\$11,955	\$12,111
>3,000 SQ T	2.74	\$13,051	\$13,221
Multifamily ⁴ Avg. (\$/dwelling unit)	1.78	\$8,478	\$8,589
Other Housing			
Mobile Homes (\$/unit)	2.26	\$10,764	\$10,905
Accessory Dwelling Units (\$/unit)	1.08	\$5,144	\$5,211
Dormitories (\$/person)	1.00	\$4,763	\$4,825
Overnight Visitor Accommodation (\$/unit)	1.87	\$8,907	\$9,023

¹ Cost per person (\$4,763) X people per unit

²Includes Deschutes County and City of Bend Administration Charges (1.3% combined)

³Single family includes tiny homes

⁴Multifamily includes housing with 2 or more units, including senior housing (independent living) and assisted living.