



Bend Metro Park & Recreation District

June 3, 2025

Board of Directors

Agenda and Reports

www.bendparksandrec.org



play for life



Our Vision

To be a leader in building a community connected to nature, active lifestyles and one another.

Our Mission

To strengthen community vitality and foster healthy, enriched lifestyles through parks, trails and recreation.

Our Community Pledge

To reflect our community, welcome and serve equitably, and operate with transparency and accountability.

We Value

COMMUNITY by interacting in a responsive, considerate and efficient manner to create positive patron experiences and impact in the community.

INCLUSION by reducing physical, social and financial barriers to our programs, facilities and services, and making them more equitable for all.

SAFETY by promoting a safe and healthy environment for all who work and play in our parks, trails, facilities and programs.

STAFF by honoring the diverse contributions of each employee and volunteer, and recognizing them as essential to accomplishing our mission.

SUSTAINABILITY by fostering a balanced approach to fiscal, environmental and social assets to support the health and longevity of the district, the environment and our community.



District Office

799 SW Columbia St., Bend, Oregon 97702 | www.bendparksandrec.org | (541) 389-7275

BUSINESS SESSION

1. Second Reading and Adoption of Ordinance No. 13 – System Development Charges (SDC) – *Kristin Toney/Paul Taylor (10 min)*
2. Adopt Resolutions Relating to System Development Charges – *Kristin Toney and Deb Galardi (30 min)*
 - a. Resolution No. 2025-04 – Adopting an Updated Methodology for Calculating System Development Charges
 - b. Resolution No. 2025-05 – Adopting Updated SDC Capital Projects List
 - c. Resolution No. 2025-06 – Adopting a Fee Schedule for System Development Charges
 - d. Resolution No. 2025-07 – SDC adopting deferrals fees and interest.
 - e. Resolution No 2025-08 – Adopting Procedures for Entering into Developer Agreements
3. Hold Public Hearing and Adopt Resolution No. 2025-09 – Adopting the Budget and Making Appropriations for Fiscal Year 2025-26 and Adopt Resolution No. 2025-10 – Imposing and Categorizing Taxes for Fiscal Year 2025-26 – *Kristin Toney (10 min)*
4. Adopt Resolution No. 2025-11 – Adopting the FY 2026-2030 Capital Improvement Plan – *Brian Hudspeth (5 min)*
5. Award Progressive Design-Build Contract for the JSFC Pool Cover and Renovation Project – *Brian Hudspeth (10 min)*

EXECUTIVE DIRECTOR’S REPORT

MEETING SUMMARY – 05/20/2025

REPORTS – Project Update, Park Services Report

BOARD MEETINGS CALENDAR

GOOD OF THE ORDER

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Accessible Meeting/Alternate Format Notification

This meeting location is accessible. Sign and other language interpreter services, assistive listening devices, materials in alternate format or other accommodations are available upon advance request. Please contact the Executive Assistant no later than 24 hours in advance of the meeting at sheilar@bendparksandrec.org or 541-706-6151. Providing at least 2 business days’ notice prior to the meeting will help ensure availability.

BOARD AGENDA COMMUNICATION

AGENDA DATE:	June 3, 2025
SUBJECT:	Employee Engagement Survey Results
STAFF RESOURCE:	Sheila Reed, Assistant to the Executive Director
GUEST PRESENTER:	Janelle Callahan, CPS HR Consulting
PREVIOUS BOARD ACTION:	None
ACTION PROPOSED:	None
STRATEGIC PLAN:	
Pillar:	Team
Outcome:	A workforce that is heard, informed, involved and valued
Strategy:	Continue to develop a collaborative and welcoming work culture across departments and between all levels of the organization

BACKGROUND

The district partnered with the Institute for Public Sector Employee Engagement, a division of CPS HR Consulting, to administer its first employee engagement survey in 2022. A second survey was conducted in February 2025. CPS HR specializes in helping public agencies measure and improve employee engagement through confidential surveys. All responses are anonymous and managed exclusively by CPS HR. In addition to survey administration, CPS HR conducts research and provides benchmark data across local, state, and national government agencies, as well as private industry. The 2025 survey results reflect current staff feedback and include a comparison to the 2022 survey findings.

The survey was conducted from February 3 – February 28, 2025. The survey response rate was 50%, an average rate of participation. The survey was comprised of 94 questions, most of the questions were standard questions on the survey to allow for benchmarking with other agencies and some were district specific questions.

Janelle Callahan will present the survey results during the board meeting, discuss outcomes and benchmark comparisons of other agencies. Overall, the survey's responses were positive, and staff are pleased with the results.

BUDGETARY IMPACT

The funding to conduct the survey was part of the Administration Department's FY 2025 budget. The results of the survey provide one metric to help inform future decisions related to employee compensation, benefits, professional development and other employee initiatives.

STAFF RECOMMENDATION

None

MOTION

For informational purposes only

ATTACHMENT

None

BOARD AGENDA COMMUNICATION

AGENDA DATE:	June 3, 2025
SUBJECT:	Recreation Programming Plan
STAFF RESOURCE:	Matt Mercer, Recreation Services Director
PREVIOUS BOARD ACTION:	April 1, 2025 – Received board input on priorities
ACTION PROPOSED:	Receive board input and feedback for final Plan
STRATEGIC PLAN:	
Priority:	Service
Goal:	Support the recreational needs of an evolving community through programming, parks, trails and facilities
Strategy:	Monitor and adapt programming to meet community needs

BACKGROUND

The Recreation Programming Plan (“Plan”) is an overarching planning document that guides district recreation programming priorities over the next five years. It is complementary document to the district Comprehensive Plan which focuses on infrastructure needs. The Plan also complements and supports the district Strategic Plan which is more internally focused and district-wide in scope. The Plan is also a best practice and is required for CAPRA accreditation.

The existing Recreation Programming Plan covered the period 2020-25 and therefore was due for updating or replacing. Conditions have changed considerable since the existing plan was written so staff elected to do a full re-write for a new plan covering 2025-2030. The new Plan is informed by a variety of inputs and sources including:

- Community recreation survey conducted in January and February of 2025 and qualitative community input and feedback received through evaluations, comments, etc.
- Other district planning efforts including the Comprehensive and Strategic Plans
- Community demographics and trends
- Participant use data, demographics and trends
- District financial condition and reports including financial forecast
- Staff input and Board feedback

The Overview and Key Priorities and Considerations sections of the new Plan are attached and serve as an executive summary. The full plan is available for view in the following link:

<https://www.bendparksandrec.org/wp-content/uploads/2025/05/Recreation-Programming-Plan-2025-2030.pdf>

Staff will provide a brief summary of the Plan focusing on the key priorities and final board input and feedback before finalizing the Plan. The Plan is scheduled for board approval as part of the consent agenda at the June 17, 2025 board meeting.

BUDGETARY IMPACT

The district invested \$25,000 in the Community Recreation Programming Survey which was included in the adopted Fiscal Year 24-25 budget. There are no other direct costs associated with plan as it was developed and produced in-house.

STAFF RECOMMENDATION

None

MOTION

None

ATTACHMENTS

- A. Recreation Programming Plan summary - Overview and Key Priorities and Considerations Sections of 2025-2030 Recreation Programming Plan
- B. Recreation Plan: <https://www.bendparksandrec.org/wp-content/uploads/2025/05/Recreation-Programming-Plan-2025-2030.pdf>

Recreation Programming Plan

2025-2030



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1. OVERVIEW

Purpose

The Recreation Programming Plan provides overarching guidance and direction on the development and delivery of recreation programs and services for the five-year period: 2025-2030. It does this by identifying community desires and trends and specific initiatives and goals that will drive the prioritization of available resources. Because recreation preferences and market conditions are dynamic and ever-changing, especially in a growing community such as Bend, the plan takes a broad approach to recreation programming and is adaptable.

Relationship To District-Wide Planning Efforts

The Recreation Programming Plan complements and supports two primary district-wide planning efforts: the Comprehensive Plan and the Strategic Plan. The Recreation Programming Plan focuses on the delivery of recreation programs and services, whereas the Comprehensive Plan addresses system infrastructure needs and the Strategic Plan drives district-wide initiatives.

Key Input and Sources

The Recreation Programming Plan is based on and informed by input from a variety of sources, including:

- 2025 Community Recreation Survey
- Qualitative community input
- Demographic analysis and trends
- Participation analysis and trends
- General recreation trends
- District financial considerations
- Staff and Board of Directors input and feedback



1. OVERVIEW (cont.)

Community Survey

The district conducted a Community Recreation Survey (Recreation Survey) in January and February of 2025 to receive community-wide input on recreation programming and priorities. A consultant administered the survey that included a statistically valid sample and an open link opportunity for anyone to participate. Nearly 2,200 surveys were received, including almost 700 for the statistically valid sample and nearly 1,500 for the open link option. The Recreation Survey results inform the Plan and are referenced in several sections. The statistically valid results are the primary results referred to in this Plan, with open link survey results occasionally represented.

How The Plan Is Used

The Recreation Programming Plan is intended to be a living document that is frequently referenced and updated as needed. The Plan establishes the key priorities and goals for the Recreation Department for the next several years, ensuring that staff, facility and financial resources are focused on meeting community needs and priorities. The priorities identified in this Plan will be carried out through service delivery plans in each major program area. These annual plans include specific goals, strategies and tactics that support the priorities in this plan as well as the district Strategic Plan.

Progress And Updates

Progress will be monitored and reported as follows:

- Participation trends in all program areas will be collected and analyzed at least quarterly
- Key Performance Indicators will be updated annually (See Chapter 14 for information on KPIs)
- A review of progress on key priorities will be conducted annually, and a written summary will be prepared
- Priorities and goals will be updated if there are significant changes in direction, priorities or resources



2. FUTURE COSIDERATIONS

Current Status

The district recreation program is in a strong position with high participations levels, an excellent reputation for offering quality services and a stable financial position. The district rebounded rapidly from the COVID pandemic and with the addition of Larkspur Community Center and other expanded programs is serving more people than ever. The success is not without challenges. Recreation facilities are operating at or near capacity during peak times, and many programs fill quickly and have waiting lists. Outreach efforts have been so successful that they have outpaced the ability to fund scholarship and inclusion demands. These are good problem, but problems nonetheless. The overall challenge over the next five years will be maintain the current high level of service as demand continues to grow and financial resources become more limited.

Future Considerations

There are many factors that may impact the district's delivery of recreation services over the next 5-years. The following opportunities and challenges are anticipated to be the most impactful considerations when planning for future recreation programming.

- **Increasing Demand** – Continued growth in population combined with the strong reputation and market position the district enjoys will likely result in continued increase in demand for many programs and activities unless there is significant economic downturn or recession.
- **Demographic Opportunities** – The district currently serves approximately 80% of all youth ages 5-14., just under 40% of seniors ages 65+ and around 20% of adults 20-64. Yet youth ages 5-14 make up only 12% of the population, while seniors ages 65+ represent 18% of the population and adults the remaining 70%. With youth population growth slowing and the already high participation rates, growth potential in youth programs will likely be limited. Meanwhile, there are significant opportunities for growth in the larger and faster growing adult population, including the older adult segments where the district has a relatively strong market position.
- **Capacity Limitations** – Recreation facilities are currently operating at or near capacity during peak times and many popular recreation programs fill quickly with waitlists. However, there are also opportunities to serve additional residents during non-peak times at recreation facilities, through recreation contractors, and with the addition of the Art Station. With limited opportunities to increase capacity over the next several years, staff will need to be creative and resourceful about how to expand capacity.

2. FUTURE CONSIDERATIONS (Cont.)

- **Staffing Challenges**– Front line staffing continues to be a challenge including having sufficient numbers of staff and consistency, commitment and quality. The labor market will likely continue to be competitive due to relatively low unemployment and the high cost of living in the area., Additionally, the recreation department has experienced significant turnover in leadership staff over the past several years which will result in some loss of continuity and institutional knowledge.
- **Cost Increases** – The cost of providing programs and operating facilities is likely to increase at a greater pace than tax revenues due to increasing personnel costs and aging assets. This will make it particularly challenging to maintain affordability.
- **Financial Limitations** – The district General Fund, which subsidizes recreation services, is becoming more limited due to slowing tax revenue growth, increasing operating costs and the need to take care of aging assets. This will limit the growth in tax subsidy that can support recreation services more than in the past.



3. MAJOR PRIORITIES AND GOALS

Based on the considerations described in the previous section and the overall finding in this Plan, the following major priorities and goals should be the focus of district recreation department and programming efforts and resources. Additional program specific priorities and goals are included in subsequent sections of the Plan.

Maintain high community and customer satisfaction with recreation facilities and programs.

The district currently enjoys strong satisfaction ratings as demonstrated by several statistically valid surveys and thousands of customer evaluations. This reputation for quality leads to strong demand for district services and contributes greatly to the support and trust the community has for the district as a whole. Maintaining strong program quality and customer satisfaction should not be taken for granted and remain a high priority.

Maintain affordability for a broad range of the community.

Affordability is the number one reason for people using district services and keeping price increases to a minimum is the top priority for future actions according to the recent recreation programming survey results. Conversely, fees are one of the top barriers for 14% of the community. Keeping fees affordable for a majority of the community is also central to the district's goal of providing access to all and can reduce the demand for scholarships. This will be a challenge with increasing costs making it more critical than ever that staff seek efficiency in the delivery of programs and consider the value to the user of additions that increase costs.



3. MAJOR PRIORITIES AND GOALS (Cont.)

Increase capacity in existing facilities and programs while managing patron experience during peak times.

Overcrowding at facilities and full programs are the largest barriers to participation. Meanwhile, expanding capacity in existing programs is one the community's highest priorities for future actions. These apparently conflicting messages will require careful staff consideration and planning. There are opportunities to add programming during non-peak times at facilities that can expand capacity, serve new people and reduce overcrowding during peak times. There are also opportunities to expand non-recreation facility-based programs in some areas, including through the use of alternate locations, times and contractors.

Expand art and enrichment programming with addition of the Art Station facility.

Based on the Recreation Survey's needs analysis, art and enrichment programming have some of the strongest growth potential based on relatively high unmet demand. The opening of the Art Station in 2026 will provide the opportunity to substantially increase the number and capacity of art and enrichment offerings. This will also require careful planning and budgeting to ensure it operates within cost recovery guidelines and does not require significant tax subsidy.

Consider additional activities that engage adults, older adults and newer residents.

Growth in adults and especially older adult age groups will continue to outpace youth, and there is considerably more untapped market for adults compared to youth which the district is already serving strongly. Developing activities that appeal to adults not only provides the potential for growth but can engage new residents who are more likely to be adults. The district should also consider additional marketing efforts targeted to new residents.

Ensure sustainable way of providing financial assistance and inclusion support.

Scholarship use and inclusion support services are both critical to ensuring access for all including underserved and vulnerable community members. Over the last several years, the demand and funding for these services has grown at an exponential rate that cannot be sustained. Modifications to both programs is currently in progress but will need to be monitored and adjusted to best meet the community need with available funding.



3. MAJOR PRIORITIES AND GOALS (Cont.)



Continue to focus outreach efforts to underserved and under resourced residents.

There is strong community support for continuing district outreach efforts to facilitate participation in programs and access to services for historically underserved and under-resourced communities. At the same time, demographic changes in the community will unlikely result in significant growth in the number of residents targeted by outreach effort. Without additional funding, staff will need to be increasingly strategic in outreach efforts.

Maintain or improve current cost recovery levels.

The financial sustainability of recreation services will require maintaining or improving current cost recovery levels as the district has limited additional tax resources to subsidize recreation services. This will require maintaining a delicate balance between affordability and financial sustainability, especially if costs continue to increase as anticipated.

Complete preliminary feasible analysis for indoor recreation facilities.

Existing facilities, including Juniper, Larkspur and The Pavilion are currently operating at or near capacity at peak times. As mentioned earlier, overcrowding of facilities is the top barrier to participation and the top complaint received at facilities. While there is still ample capacity at non-peak times, additional facility capacity will be necessary to maintain the level of service that the community currently enjoys as the population grows. Completing a preliminary feasible analysis is an important first step as it will inform future decision making by providing both capital and operational requirements.

3. MAJOR PRIORITIES AND GOALS (Cont.)

Ensure staffing needs are met.

To meet many of the priorities and goals in this plan, it will be critical that staffing needs are addressed at all levels. First, front-line staffing needs must be sufficiently met to deliver current and expanded services to the community. This will remain challenging due to the dependence on part-time, non-living wage positions and the competitive labor market. Second, leadership and supervisory staff workloads must be realistic. This will require finding efficiencies and prioritizing work as the ability to add new staff will be limited. Finally, the department will need to maintain continuity and institutional knowledge with the recent retirements and departures. All of these will require thoughtful strategy and organizational resources, many of which are included in the district Strategic Plan.

Lean into partnerships.

Recreation has always looked to community collaborations, both formal and informal, as a way to better serve the community. This will become even more important in the future as facility, staff and financial resources approach capacity. The most important partnership to maintain is with Bend-La Pine Schools. The current IGA expires in 2028. Renewing and updating this agreement is critical to maintaining current levels of service. The district should continue to look to community partners to help support scholarship and inclusion needs. The district should also continue to partner with others to deliver recreation programs, including the use of other recreation providers and independent contractors.



BOARD AGENDA COMMUNICATION

AGENDA DATE:	June 3, 2025
SUBJECT:	Second Reading and Adoption of Ordinance No. 13 – System Development Charges (SDC)
STAFF RESOURCE:	Kristin Toney, Administrative Services Director Sara Anselment, Planner Brian Hudspeth, Planning & Development Director
GUEST PRESENTERS:	Paul Taylor, Bryant, Lovlien & Jarvis
PREVIOUS BOARD ACTION:	Resolution No. 421 – Adopting a Methodology for Calculating Park System Development Charges, Resolution No. 422 – Adopting an SDC Capital Projects List, and Resolution No. 425 – Adopting a Fee Schedule for System Development Charges Conducted First Reading and Public Hearing of Ordinance No. 13, May 20, 2025
ACTION PROPOSED:	Conduct second reading and consider adoption of Ordinance No. 13 – System Development Charges
STRATEGIC PLAN:	
Service:	Service
Goal:	Steward fiscal resources, and further environmental and social sustainability.
Strategy:	Use financial modeling and other planning tools to holistically evaluate, plan and forecast necessary expenditures for system expansion, operations, and maintenance.

BACKGROUND

The Board conducted a public hearing and the first reading of Ordinance No. 13 – System Development Charges on May 20, 2025. A final version of Ordinance No. 13 is attached (attachment A). The public hearing was opened and closed on May 20; no members of the public commented during the public hearing. In addition, the district received no public comments on the SDC methodology report during the 60-day review period (March 19 – May 20, 2025).

The Board may consider adopting Ordinance No. 13 at this meeting. If adopted, five resolutions related to the ordinance will also be available for the board to consider for adoption. Adoption of the Ordinance and the five resolutions will allow for the new SDC methodology to be implemented beginning July 1, 2025.

BUDGETARY IMPACT

SDCs are the main source of funding for the development of parks, trails and recreation facilities to serve growth. They support the District's goals of maintaining the same level of service as population increases. The SDC methodology establishes the SDC fees, which influence future revenues for SDC eligible projects in the district's adopted Capital Improvement Plan.

STAFF RECOMMENDATION

Staff recommend that the board conduct the second reading and consider adoption of Ordinance No. 13 – System Development Charges. The board may choose to conduct the second reading of the ordinance by title only.

MOTION

- 1. I move to conduct the second reading of Ordinance No. 13 – System Development Charges by title only.***
- 2. I move to adopt Ordinance No. 13 – System Development Charges, replacing Ordinance No. 12.***

ATTACHMENT

Attachment A – Ordinance No. 13 System Development Charges

BEND PARK & RECREATION DISTRICT ORDINANCE NO. 13

AN ORDINANCE ESTABLISHING SYSTEM DEVELOPMENT CHARGES APPLICABLE TO CERTAIN TYPES OF DEVELOPMENT WITHIN BEND PARK & RECREATION DISTRICT BOUNDARIES; AND REPEALING ORDINANCE NO. 12

WHEREAS, ORS 223.297 - 223.316 authorize local governments, including special districts, to impose System Development Charges for parks and recreation; and

WHEREAS, on June 4, 2019, the Board of Directors (the “**Board**”) for Bend Park & Recreation District (the “**District**”) adopted Ordinance No. 12 – System Development Charges (“**Ordinance No. 12**”), which authorizes District to assess and collect System Development Charges (“**SDCs**”), and Resolution No. 421 – *Methodology Report: Parks System Development Charges*; and

WHEREAS, District finds it necessary and appropriate to modify Ordinance No. 12 to update definitions, align Ordinance No. 12 with City of Bend procedures for imposing, collecting and issuing SDC deferrals, and make certain other modifications to Ordinance No. 12, subject to and in accordance with this Ordinance No. 13 (this “**Ordinance**”).

NOW, THEREFORE, Bend Park & Recreation District ordains as follows:

1. PURPOSE AND SCOPE

- A. Future growth within the District should contribute an equitable share of the cost of capacity-increasing acquisitions and improvements to parks, trails, and recreation facilities needed to accommodate such growth.
- B. System Development Charges will provide a source of revenue to finance the acquisition, construction, improvement, or expansion of District parks, trails, and recreation facilities to accommodate growth.
- C. ORS 223.297 – 223.316 authorize local governments, including special districts, to impose System Development Charges for parks and recreation.

2. DEFINITIONS

- A. “**Accessory Dwelling Unit**” or “**ADU**” means a small Dwelling Unit on a Lot of Record with a Single-Unit Dwelling (including a townhome) as the primary use. An ADU may be created at the same time as, or subsequent to, construction of the Single-Unit Dwelling. An Accessory Dwelling Unit may be attached to or detached from the Single-Unit Dwelling as long as the ADU meets the applicable City or County standards for ADUs at the time the ADU was created.
- B. “**Affordable Housing**” means Deed Restricted Residential Development that is:

1. Rental housing affordable to households with income at or below 60% of the area median income ("AMI");
 2. Owner-occupied or lease-to-own housing affordable to households with income at or below 80% of the AMI; or
 3. Homeless Shelter developments.
- C. **"Applicant"** means the Owner or other Person who applies for a Building Permit from the City or County for Residential Development or Overnight Accommodations within the boundaries of the District.
- D. **"Board"** means the District's duly elected Board of Directors.
- E. **"Building Permit"** means permission or authorization from the City or County to perform work on a property; which may be a permit for construction, electrical, mechanical, plumbing, grading or other work, or a permit authorizing the siting of a Manufactured Dwelling.
- F. **"Capital Improvements"** means public parks, trails, recreation facilities or other amenities used for parks and recreation purposes.
- G. **"Capital Projects List"** means the list of the Capital Improvements, based on the comprehensive plan or capital improvements plan adopted by the Board, that the District intends to fund, in whole or in part, with revenues from an Improvement Fee and the estimated cost, timing and percentage of costs for each Capital Improvement eligible to be funded with Improvement Fee revenues.
- H. **"Citizen or Other Interested Person"** means any person whose legal residence is within the boundaries of the District, as evidenced by registration as a voter within the District or by other proof of residency; or a person who owns, occupies, or otherwise has an interest in real property which is located within District boundaries or is otherwise subject to the imposition of SDCs, as provided in Section 3 of this Ordinance.
- I. **"City"** means the City of Bend, Oregon.
- J. **"County"** means Deschutes County, Oregon.
- K. **"Deed Restricted"** means a Site subject to a covenant, contained in a deed or other instrument recorded in the Deschutes County Official Records, that the Site will be maintained or operated as Affordable Housing for a period of not less than 30 years.
- L. **"District"** means the Bend Park & Recreation District, an Oregon special district.
- M. **"Dormitory"** means a college or university residential housing facility intended or used for occupancy of higher education students.

- N. **“DPD”** means the District’s Director of Planning & Development.
- O. **“Dwelling Unit”** means a single unit providing complete, independent living facilities for one or more persons, including permanent provisions for living, sleeping, eating, cooking and sanitation.
- P. **“Executive Director”** means the District’s executive director or the executive director’s designee, unless expressly provided otherwise.
- Q. **“Final Occupancy”** means when the City or County, as applicable, has issued a certificate of occupancy, or for projects in which no certificate of occupancy will be issued, final inspection has been conducted and approved.
- R. **“Homeless Shelter”** means a location for overnight accommodation of people who lack housing. A shelter may be either a group shelter, outdoor shelter, or multi-room shelter, as defined by the City.
- S. **“Improvement”** means any manmade change to improved or unimproved real estate, including buildings, placement or replacement of manufactured or other structures, parking and loading areas, landscaping, paved or graveled areas, grading, and areas devoted to exterior display, storage, or activities. Improvements include improved open areas such as plazas and walkways, but do not include natural geologic forms or landscapes.
- T. **“Improvement Fee”** means a fee for costs associated with capacity-increasing Capital Improvements to be constructed after the effective date of this Ordinance.
- U. **“Living Space”** means those portions of a Dwelling Unit which permanently provide for living, sleeping, eating, cooking, and sanitation. Living Space does not include spaces such as garages, decks, patios, or detached storage sheds.
- V. **“Lot”** means a unit of land that is created by a subdivision of land.
- W. **“Lot of Record”** means a unit of land held in separate ownership as shown on the records of the Deschutes County Clerk, and which conforms to all applicable zoning and subdivision or partition requirements in effect on the date the unit of land was created.
- X. **“Manufactured Dwelling”** means a Dwelling Unit that is constructed primarily at one location and is then transported to another location for either permanent or temporary siting, including residential trailers, mobile homes, manufactured homes or prefabricated structures. A Manufactured Dwelling shall be assessed the Single-Unit Dwelling SDC rate if sited on its own Lot of Record. If placed in a Manufactured Dwelling Park, a Manufactured Dwelling shall be assessed the Manufactured Dwelling SDC rate.

- Y. **“Manufactured Dwelling Park”** means a place where four or more manufactured dwellings are located, the primary purpose of which is to rent space or keep space for rent to any person for a charge or fee.
- Z. **“Methodology”** means the District’s System Development Charge methodology required by ORS 223.304(1) and (2).
- AA. **“Multi-Unit Dwelling”** means a Dwelling Unit located on a single Lot of Record with at least one other Dwelling Unit (that is not an Accessory Dwelling Unit). The Dwelling Units may be attached or detached and include duplexes, triplexes, apartments, condominiums, senior independent living, and assisted living residences. Townhomes and rowhouses which share a wall, but are located on separate Lots of Record, are not considered Multi-Unit Dwellings.
- BB. **“Overnight Accommodations”** means all or any portion of the Improvements on a Site which are designed or used for occupancy of transient individuals. Overnight Accommodations includes hotels, motels, hostels, inns, bed and breakfasts, guest lodges or ranches, RV parks, cabins, campgrounds or camping spaces, and such other Improvements as may be designated as Overnight Accommodations by separate resolution of the Board.
- CC. **“Overnight Accommodations Unit”** means those individually occupiable units within an Overnight Accommodations development, and include hotel rooms, motel rooms, camping sites, RV pads or spaces, yurts, cabins, bed and breakfast rooms and hostel sleeping quarters.
- DD. **“Owner”** means the owner or owners of record of real property, as shown in the official records of the County, or a person purchasing a piece of property under a contract of sale. For the purposes of violations of this Ordinance and binding agreements between the District and the Owner, “Owner” shall also mean the leaseholder, tenant or other person in possession or control of all or any portion of the property at the time of such violation.
- EE. **“Parcel”** means a unit of land that is created by a partition of land.
- FF. **“Person”** means an individual, corporation, partnership, limited liability company, trustee, or any other legal entity of any type.
- GG. **“Qualified Public Improvement”** means a Capital Improvement that is:
1. Required as a condition of development approval; and
 2. Identified in the Capital Projects List adopted pursuant to Section 5 of this Ordinance; and either is:
 - a. Not located on or contiguous to a Site that is the subject of the development approval; or

- b. Located in whole or in part on or contiguous to a Site that is the subject of development approval and required to be built larger or with greater capacity (over-capacity) than is necessary for the particular development project to which the Improvement Fee is related; and

3. Approved/accepted by the District.

For purposes of this definition, contiguous means property within a public way that abuts the Site.

HH. **“Redevelopment”** means alteration, addition, replacement, or change in use of a Site that has an existing or previously existing use, including conversions of existing Improvements, into new or expanded Residential Development or Overnight Accommodations, or conversions of a portion of existing improvements into additional Living Space.

II. **“Reimbursement Fee”** means a fee for costs associated with Capital Improvements already constructed, or under construction when the fee is established, for which the local government determines that capacity exists.

JJ. **“Residential Development”** means all improvements on a Site, including buildings and other structures, which create Dwelling Units or other residential Living Space. Residential Development includes Single-Unit Dwellings, Multi-Unit Dwellings, Dormitories, Manufactured Dwellings, Accessory Dwelling Units, and such other Improvements as may be designated as Residential Development by separate resolution of the Board.

KK. **“Single-Unit Dwelling”** means a single Dwelling Unit located on a single Lot of Record. Single-Unit Dwellings include attached or detached Improvements (e.g., townhomes or rowhouses), regardless of the designation used by the City, County, or Applicant; provided, however, Single-Unit Dwellings do not include accessory dwelling units. The Single-Unit Dwelling rate applies to the primary Dwelling Unit on a Lot of Record, regardless of the presence of one or more ADUs on such Lot of Record.

LL. **“Site”** means a lot, parcel, block or other tract of land that (or group of adjacent lots, parcels, blocks or other tracts of land, whether or not under the same ownership) that is or may be occupied by Residential Development or Overnight Accommodations.

MM. **“System Development Charge”** or **“SDC”** means a Reimbursement Fee or an Improvement Fee assessed or collected at the time of the issuance of a Building Permit, or at such other time as may be designated by resolution of the Board.

3. **SYSTEM DEVELOPMENT CHARGE FRAMEWORK**

- A. SDCs are imposed upon all new Residential Development and Overnight Accommodations within District boundaries. SDCs are also imposed on all Redevelopment, if such Redevelopment results in: (i) in the case of Residential Development, an increase in the number (or a change in the type) of Dwelling Units, compared to the Dwelling Units

existing on the Site prior to such Redevelopment, or additions or conversions resulting in additional Living Space in a Dwelling Unit; (ii) in the case of Overnight Accommodations, an increase in the number (or a change in the type) of Overnight Accommodations Units, compared to the Overnight Accommodations Units existing on the Site prior to such Redevelopment; or (iii) any Redevelopment of property which converts the existing use into new Residential Development or Overnight Accommodations.

- B. For an increase in the number of Dwelling Units, or the addition of Living Space within an existing Dwelling Unit, or a change in the type of Dwelling Unit, the amount of SDCs to be paid shall be the difference between the rate that would be imposed for the existing development and the new development. For an increase in the number of Overnight Accommodations Units or Redevelopment of a Site into Overnight Accommodations, the amount of SDCs to be paid shall be the difference between the rate that would be imposed for the existing development and the new development.
- C. System Development Charge amounts, as well as the Capital Projects List, administrative review procedures, and other implementing measures related to this Ordinance shall be established, and may be revised from time to time, by separate resolutions of the Board. A change in implementing measures, administrative fees, qualified projects, and similar changes shall not require amendment of this Ordinance or the Methodology.
- D. A resolution may include definitions of categories for determining the amount of SDCs due for certain types of development. If a particular development or type of use is not clearly Residential Development or Overnight Accommodations, the Executive Director may make a case-by-case determination of appropriate category and the amount of SDCs payable for the development using any methodology reasonably calculated to determine impacts on parks and recreation system resulting from the development or use.
- E. The SDCs imposed by this Ordinance are separate from, and in addition to, any applicable tax, assessment, charge or fee otherwise provided by law or imposed as a condition of development.

4. METHODOLOGY

- A. The Methodology used to establish or modify the Reimbursement Fee shall be based upon, when applicable, the cost of existing facilities (including without limitation design, financing and construction costs), prior contributions by then-existing property Owners, gifts or grants from federal, state, municipal or quasi-municipal government or private persons, the value of unused capacity available to future system users, rate-making principles employed to finance publicly-owned capital improvements, and other relevant factors identified by the District Board. The Methodology shall promote the objective that future Residential Development and Overnight Accommodations developed within the District shall contribute no more than an equitable share of the cost of then-existing facilities.

- B. The Methodology used to establish or modify the Improvement Fee shall consider the projected cost of Capital Improvements identified on the Capital Projects list that are needed to increase the capacity of the systems to which the fee is related, and the need for increased system capacity that will be required to serve the demands placed on the system by future users. The Methodology shall be calculated to obtain the cost of Capital Improvements for the projected need for available system capacity for future system users.
- C. The Methodology used to establish or modify the Improvement Fee or the Reimbursement Fee, or both, shall be adopted by separate resolution of the District Board.

5. EXPENDITURES

- A. The District shall establish separate accounts for each type of SDC, i.e., Reimbursement Fees and Improvement Fees, which shall be segregated from all other District accounts. All SDC revenues shall be deposited in the appropriate account immediately upon receipt.
- B. Reimbursement Fees shall be spent only on Capital Improvements, including replacements and major repairs, or expenditures relating to repayment of indebtedness.
- C. Improvement Fees shall be spent only on capacity-increasing Capital Improvements, including expenditures relating to repayment of future debt for such improvements. An increase in system capacity occurs if a Capital Improvement increases the level of performance or service provided by existing facilities or provides new facilities. The portion of the Capital Improvements funded by Improvement Fees shall be related to the need for increased capacity to provide service for future users.
- D. Notwithstanding subsections B and C of this section, SDC revenues may also be expended on the direct costs of complying with the provisions of this Ordinance and related state statutes, including, but not limited to, the costs of developing SDC Methodologies and providing an annual accounting system for SDC expenditures.
- E. The monies deposited in the separate SDC accounts shall be used solely for Capital Improvements allowed by ORS Chapter 223 including, but not limited to:
 - 1. design and construction plan preparation;
 - 2. permitting and fees;
 - 3. land and material acquisition costs, including any costs related to costs of condemnation;
 - 4. construction of Capital Improvements;

5. site preparation and grading and the design and construction of new drainage facilities or off-site improvements required as a condition for the construction of Capital Improvements;
 6. relocating utilities required by the construction of Capital Improvements;
 7. landscaping;
 8. construction management and inspection;
 9. surveying, soils and material testing;
 10. acquisition of capital fixtures and equipment;
 11. payment of principal and interest, necessary reserves and costs of issuance under any bonds or other indebtedness issued by the District to fund adopted Capital Improvements; and
 12. direct costs of complying with the provisions of ORS Chapter 223 including the consulting, legal, and administrative costs required for developing and updating the SDC Methodology report, resolution/ordinance, and Capital Projects List; and the costs of collecting and accounting for SDC expenditures.
- F. Funds on deposit in the separate SDC accounts shall not be used for:
1. any expenditure that would be classified as a maintenance or repair expense; or
 2. costs associated with the construction of administrative office facilities that are more than an incidental part of other Capital Improvements.
- G. Capital Improvements being funded wholly or in part with SDC revenues shall be included in the District's Capital Projects List. The Capital Projects List shall be adopted by resolution of the District Board, and may be modified at any time by separate resolution adopted by the District Board. If the District's SDCs will be increased by a proposed modification of the Capital Projects List, the District shall provide notice, including the proposed adoption date, to persons who have requested notice. If the District receives a written request for a hearing on the proposed modification not less than seven (7) days prior to the proposed adoption date of the modification, the District shall hold a public hearing. If the District does not receive such a request, no hearing is required. The District's decision to increase the SDCs by modification of the Capital Projects List may be judicially reviewed only as provided in ORS 34.010 to 34.100.
- H. Any SDC funds on deposit in the separate SDC accounts that are not immediately necessary for expenditure shall be invested or deposited in an interest-bearing account by the District. All income or interest derived from such investments shall be deposited in the SDC funds accounts and used as provided in this Ordinance.

- I. The District shall prepare an annual accounting report for its SDCs, including the total amount of SDC revenue deposited in the separate SDC accounts, and Capital Improvement projects that were funded with SDC revenues.

6. CALCULATION; COLLECTION

- A. The Methodology establishes the SDC rate applicable to each category of Residential Development and Overnight Accommodations. The SDCs payable for a particular project are calculated by multiplying the applicable rate (as may be adjusted from time to time by Board resolution, as provided in this Ordinance) by the number of Dwelling Units or Overnight Accommodations Units, as applicable, in the Applicant's project.
- B. District SDCs are payable upon the earlier of (1) notification by the City or County that a Building Permit is ready for issuance, or (2) commencement of any development activity for which a Building Permit is required but not obtained. If SDCs are due and payable at the time of issuance of a Building Permit, and if development work commences without an appropriate permit, the SDCs shall be immediately payable, together with interest at an annual rate of 12%, from the earliest date that a Building Permit was required.
- C. Payment of SDCs for Residential Development may be deferred from the time payment is otherwise due until Final Occupancy, subject to the provisions of this section. (Payment of SDCs for Overnight Accommodations may not be deferred.) Deferrals not in compliance with this Ordinance are not permitted.
 1. A deferral application must be submitted by the Applicant, and the deferral approved by the District, before the SDCs become payable under Section 6.B. or before the Building Permit is accepted by the Applicant. A deferral application under this section must be accompanied by the applicable fee amount, if any, established by separate Board resolution to cover all District costs associated with the deferral. District may charge interest on deferred SDCs, to be collected at the time Final Occupancy is certified, at a rate established by separate Board resolution. No additional agreement is necessary to receive a deferral under this section. The District may delegate the approval of deferral applications to the City or County, as applicable, by appropriate intergovernmental agreement.
 2. All deferred SDCs must be paid before the City or County, as applicable, will certify Final Occupancy. Occupancy of the development before payment of the applicable SDCs is prohibited.
 3. Beginning on the effective date of this Ordinance, the amount of SDCs due shall be the total amount calculated by applying the SDC rate in effect on the date the application was submitted to the City or County, as applicable, for the permit or other action for which the SDCs first became payable for the project, regardless of whether the SDC rates have increased by the time payment is due under a deferral under this

Section 6.C. For deferral agreements in place prior to July 1, 2025, the calculation of the amount due shall be as provided in the deferral agreement.

4. The deferral under this Section 6.C. is available for all Residential Development applied for after July 1, 2025.
- D. District may delegate responsibility for calculating and collecting SDCs to the City or County by intergovernmental agreement. In the event of such delegation, the Board shall have the authority to implement, by resolution, an alternative collection time for District SDCs; provided, however, any such alternative time of collection shall be consistent with the time of collection used by the City or County, as applicable.

7. EXEMPTIONS

Notwithstanding Section 3A, the following development is exempt from payment of District SDCs:

- A. Non-residential development, other than Overnight Accommodations.
- B. Through June 30, 2025, alteration, expansion, or replacement of an existing Single-Unit Dwelling where no additional Dwelling Unit is created. Beginning July 1, 2025, alteration, expansion, or replacement of an existing Single-Unit Dwelling that does not increase the square footage of the Dwelling Unit to the next tier of SDCs, as shown in the SDC fee schedule.
- C. The construction of accessory buildings or structures which will not create additional Dwelling Units, and which do not create additional demand on District Capital Improvements.
- D. Hospice care facilities, Alzheimer's care facilities, and end of life residential care facilities, and such other uses as the Executive Director may determine have little or no impact on District Capital Improvements.
- E. Temporary shelters for homeless persons and other uses, such as emergency/rapid response temporary units or camping type shelters (excluding those designated as Overnight Accommodations).

The District may delegate exemption processing to the City or County, as applicable, by appropriate intergovernmental agreement. Exemptions expire upon conversion of the property from the exempted use to another use.

8. CREDITS FOR QUALIFIED PUBLIC IMPROVEMENTS

- A. The District may grant a credit against the Improvement Fee portion of the SDCs imposed pursuant to Section 3 for the contribution of land for, or for the construction of, any Qualified Public Improvements.

- B. Prior to issuance of a Building Permit, the Applicant shall submit to the Executive Director a proposed plan and estimate of the cost for contributions of a Qualified Public Improvement for which a credit may be allowed. The proposed plan and estimate shall include:
1. a designation of the development for which the proposed plan is being submitted;
 2. a legal description of any land proposed to be contributed and a written appraisal prepared in accordance with Section 8.E.1.;
 3. a list of the contemplated Qualified Public Improvements contained within the plan;
 4. an estimate of proposed construction costs certified by a professional architect or engineer; and
 5. a proposed time schedule for completion of the proposed plan.
- C. The Applicant shall have the burden of demonstrating that a particular Qualified Public Improvement qualifies for a credit. The amount of the credit to be applied shall be determined according to the following conditions:
1. When new Residential Development occurs, the SDCs for the existing use, if applicable, shall be calculated and, if less than the SDCs for the proposed use, the difference between the SDCs applicable to the existing use and the SDCs applicable to the proposed use shall be the SDCs payable for the project. If the change in the use results in the SDCs for the proposed use being less than the SDCs for the existing use, then no SDCs shall be charged. No refund or credit shall be given unless provided for elsewhere in this Section 8.
 2. If a Qualified Public Improvement is located in whole or in part on or contiguous to the property that is the subject of the development approval and is required to be built larger or with greater capacity than is necessary for the particular development project, a credit may be given only for the cost of that portion of the improvement that exceeds the District's minimum standard facility size or capacity needed to serve the particular development project or property. The Applicant shall have the burden of demonstrating that a particular improvement qualifies for a credit under this subsection.
- D. If the contribution of land or construction of a Qualified Public Improvement gives rise to a credit amount greater than the amount of the SDCs that would otherwise be levied against the project receiving development approval, the excess credit may be applied against SDCs that accrue in subsequent phases of the original development project. Any excess credit must be used not later than 10 years from the approval date for the credit.
- E. Calculation of credits will be subject to the following standards:

1. The value of contributed lands shall be based upon a written appraisal of fair market value by a qualified professional appraiser based upon comparable sales of similar property between unrelated parties in an arms-length transaction; and
 2. The anticipated construction cost of the Qualified Public Improvements shall be based upon cost estimates certified by a professional architect or engineer.
- F. Upon approval of the District, the decision of the Executive Director, as to whether to accept the proposed contribution plan and the value of such contribution, shall be in writing and issued to the Applicant within 30 days of the date that all data is received for review.
- G. Any Applicant who submits a proposed plan pursuant to this Section 8, and who desires the immediate issuance of a Building Permit, shall pay the applicable SDCs at the time of issuance of such Building Permit. Such payment shall not be construed as a waiver of any credit. Any difference between the amount paid and the amount due, as determined by the Executive Director, shall be refunded to the Applicant. In no event shall refund by the District under this subsection exceed the amount originally paid by the Applicant.
- H. The District may, in its sole discretion, grant a credit for land transferred to the District for park and recreational use, but which does not otherwise meet the requirements of this Section 8.
- I. Credits shall not be transferable from one development to another.
- J. Credits shall be transferable within the same development if all or part of the development is sold, prior to completion of the development, but after completion and dedication of the Qualified Public Improvements.
- K. Credits shall not be transferable from the District's SDCs to any other governmental agency's system development charges.
- L. Credits shall be used within 10 years from the date the credit is given.

9. DEVELOPER REIMBURSEMENT PROCEDURES AND PAYMENTS

- A. Upon approval of the District Board, the District may enter into agreements with developers who propose to expand the park system by dedicating or constructing Capital Improvements. These agreements would allow the District to reimburse the developer for such improvements using a portion of the SDCs collected within a designated recovery area.
- B. The Capital Improvements may serve only the proposed development (a "sole recovery area") or the proposed development and areas beyond it (a "shared recovery area").

- C. The District Board shall adopt, by separate resolution, procedures for entering into such agreements. The resolution shall address:
1. Procedures for entering into such agreements.
 2. Applicable District, City, and County policies, standards, rules and regulations.
 3. Responsibilities for paying the cost of such Capital Improvements.
 4. Eligibility for SDC reimbursement payments.
 5. Procedures for determining the extent of the area served by proposed Capital Improvements.
 6. Procedures for remitting SDC s collected in the sole recovery area or shared recovery area to eligible developers.
 7. Payment schedules and conditions for SDC reimbursement payments.
 8. Procedures for calculating the amount of the reimbursement payments.
 9. Procedures for determining the value of qualified Capital Improvements.

10. REFUNDS AND WAIVERS

A. Refunds.

1. Refunds may be given upon the District's finding that there was a clerical error in the calculation of SDCs.
2. Refunds shall not be allowed for failure to timely claim a credit or for failure to seek an alternative SDC rate calculation in a timely manner, prior to submission of an application for a Building Permit. The District will not issue refunds if the Applicant fails to claim a credit or fails to seek an alternative SDC rate calculation prior to paying an SDC, except for clerical errors, as stated above, or as a result of an objection or review as provided in Section 13.
3. An Applicant or Owner shall be eligible to apply for a refund if:
 - a. The Building Permit has expired, and the development authorized by such permit was not commenced; or
 - b. The District has not expended the SDC revenues prior to the end of the fiscal year immediately following the tenth anniversary of the date upon which such SDCs were paid. For the purposes of this Section 10.A.3., the first funds received shall be deemed to be the first funds expended. If approved, the amount of the refund

shall not exceed the unexpended portion of SDCs collected in connection with the applicable Building Permit.

4. An application for refund shall be filed with the District and contain the following:
 - a. The name and address of the Applicant;
 - b. The location of the property which was the subject of the SDCs;
 - c. A notarized sworn statement that the petitioner is the then-current Owner of the property on behalf of which the SDCs were paid; including proof of ownership, such as a certified copy of the latest recorded deed;
 - d. The date the SDCs were paid;
 - e. A copy of the receipt of payment for the SDCs; and, if appropriate,
 - f. The date the Building Permit was issued, and its expiration date.
5. The application for a refund shall be filed within 90 days of the expiration of the Building Permit, Placement Permit, or within 90 days of the end of the fiscal year following the tenth anniversary of the date upon which the SDCs were paid. Failure to timely apply for a refund of the SDCs shall waive any right to a refund.
6. Within 30 days from the date of receipt of a petition for refund, the District will advise the petitioner of the status of the request for refund, and if such request is valid, the SDCs (or eligible portion of the SDCs) shall be returned to the petitioner.
7. A subsequent Applicant for a Building Permit on property for which a refund was previously issued, shall pay the SDCs required by Section 3.

B. Waivers

1. The Executive Director may grant a waiver of District SDCs upon finding that the subject development places no demand on the District park and recreation system.
2. The District Board may, by separate resolution, designate other types of Residential Development, including, but not limited to, Affordable Housing, for which SDC waivers may be applied.
3. If the property use under which a waiver was granted is modified or discontinued, the waiver will expire and the District's then-current SDCs will be due and payable by the Owner unless otherwise determined by the Executive Director.

11. ADOPTION OR AMENDMENT OF METHODOLOGY

- A. The District Board shall hold a public hearing prior to adopting or amending the methodology on which any SDCs are based. Notice of the public hearing shall be given as provided in Section 12. If changes in the Methodology are undertaken by the District, the District shall coordinate such changes with the City and County prior to adoption pursuant to any intergovernmental agreements between the District and County or the City, as applicable.
- B. A change in the amount of a reimbursement fee or an improvement fee is not a modification of the SDC methodology if the change is based on: (1) a change in project costs, including cost of materials, labor and real property applied to projects or project capacity as shown on the Capital Projects List; or (2) periodic application of one or more specific cost indexes included in the methodology or adopted by separate ordinance or resolution, as provided in ORS 223.304.

12. NOTICE

- A. The District shall maintain a list of persons who have made a written request for notification prior to adoption or modification of a Methodology for any SDCs. Written notice shall be mailed to persons on the list at least 90 days prior to the first hearing to establish or modify any SDCs. The Methodology supporting the SDCs shall be available at least 60 days prior to the first hearing to adopt or amend SDCs. The failure of a person on the list to receive a notice that was mailed shall not invalidate the action of the District. Legal action intended to contest the Methodology may not be filed after 60 days following the District's adoption or modification of the SDC ordinance or resolution.
- B. The District may periodically delete names from the list, but at least 30 days prior to removing a name from the list, the District must notify the person whose name is to be deleted that a new written request for notification is required if the person wishes to remain on the notification list.

13. CHALLENGES, OBJECTIONS, REVIEWS AND APPEALS

- A. Challenge of Expenditures.
 - 1. Any Citizen or Other Interested Person may challenge an expenditure of SDC revenues.
 - a. Such challenge shall be submitted, in writing, to the Executive Director for review within two years following the subject expenditure, and shall include the following information:
 - i. The name and address of the Citizen or Other Interested Person challenging the expenditures;

- ii. The amount of the expenditure; the project, payee, or purpose; and the approximate date on which it was made; and
 - iii. The reason why the expenditure is being challenged.
 - b. If the Executive Director determines that the expenditure was not made in accordance with the provisions of this Ordinance and other applicable laws a reimbursement of SDC revenues shall be made from other revenue sources within one year following the determination that the expenditure was not appropriate.
 - c. The Executive Director shall make written notification of the results of the expenditure review to the person who requested the review within 10 days of completion of the review. The Executive Director's decision may be judicially reviewed only as provided in ORS 34.010 to 34.100.
- B. Review of Methodology.
- 1. Legal action contesting the methodology used for calculating a system development charge must be filed within 60 days following the District's adoption or modification of the SDC ordinance or resolution. A Citizen or Other Interested Person shall request judicial review of the methodology used for calculating a system development charge only as provided in ORS 34.010 to 34.100.
- C. Objection to SDCs Imposed.
- 1. An Applicant who is required to pay SDCs may object to the following:
 - a. The SDC calculation or estimate, or the application of the SDC Methodology to the Applicant's project; provided, however, the SDC Methodology itself may not be reviewed, except as provided in Section 13.B.
 - b. The amount or denial of a proposed credit for contribution of a Qualified Public Improvement pursuant to Section 8.
 - 2. At any time prior to filing a request for formal review of its objection under this Section 13, an Applicant may have informal discussions with District staff designated by the DPD to try to resolve the Applicant's objection. District staff have the authority to work with City or County staff, as applicable, to resolve objections in a manner consistent with this Ordinance.
 - 3. Any Applicant desiring a formal review of its objection shall file a written request with the DPD, accompanied by the applicable objection fee, if any, established by separate Board resolution. The written request shall contain the following information:
 - a. The name and address of the Applicant;

- b. The legal description of the property in question;
 - c. If issued, the date the Building Permit was issued;
 - d. A brief description of the development being undertaken pursuant to the Building Permit;
 - e. If paid, the date the SDCs were paid; and
 - f. An explanation of the Applicant's objection, including the amount in dispute, the reasons why the Applicant believes the amount is incorrect, the amount the Applicant believes is appropriate with an explanation of that amount, and a request for a meeting, if desired.
4. The Applicant's request for review must be filed within 30 days of the date of first receipt of the denial, calculation or estimate. Failure to request a formal review of any objection within the time provided shall be deemed a waiver of such right. It is the Applicant's responsibility to understand the development application system used by the City or County, as applicable, including any online portal or other electronic system. If an online portal or other electronic system is used, an Applicant shall be deemed to have received notice, of the SDC amount estimate or calculation, for the purpose of any protest, appeal or other time period specified in this Ordinance as commencing on receipt of such notice, on the date such notice was uploaded to the online portal or other electronic system. It is the Applicant's responsibility to regularly check any online portal or other electronic system used by the City or County, as applicable. Recalculation of SDC amounts following (i) amendment of a development application by the Applicant, or (ii) an increase in the SDC rates applicable to the Applicant's project, shall not give rise to a new opportunity to object to the calculation or estimate; provided, however, that the Applicant may submit an explanation of any errors in the District's arithmetic used for the calculation or estimate.
5. Following payment by the Applicant of any objection fee required by board resolution, the DPD shall respond to the objection in writing within 10 days unless the Applicant requests a meeting. If a meeting is requested, the DPD shall meet with the Applicant within a reasonable period of time. In the event a meeting is held, the DPD will issue, on behalf of the District, a written response to the objection no later than 10 days after the meeting. The District's response may (i) affirm the original amount, (ii) reduce the original amount, or (iii) request additional information. Notwithstanding the foregoing, a request for additional information is not the District's response. If other information is requested and provided pursuant to parameters established by the District, the District shall provide its response to the objection within 15 days of receiving the additional information.
6. The Applicant may appeal the District's response to the objection by submitting a written appeal to the Executive Director, accompanied by the applicable appeal fee,

if any, established by separate Board resolution. The written appeal, and any required appeal fee, must be received by the Executive Director within 10 days of Applicant's receipt of the District's response to the objection. The appeal must include the Applicant's explanation of why the District's response to the objection was incorrect, and may also include evidence and written argument, and a request for a meeting with the Executive Director. The Applicant may submit additional evidence and written argument within 10 days of the day the appeal is submitted to the Executive Director. The appeal will be determined by the Executive Director. The District shall provide a written decision on the appeal within 30 days of filing the appeal, or within 10 days of any meeting, whichever is later. The District's appeal decision shall be subject to review only in accordance with ORS 34.010 to 34.100.

7. Any Applicant who requests a review or appeal pursuant to this Section 13, and who desires the immediate issuance of a Building Permit, shall pay the SDC amount calculated by the District no later than the time the review or appeal request is filed. Such payment shall not be construed as a waiver of the Applicant's review rights.
8. An Applicant may request review or appeal under this Section 13, without paying the applicable SDCs, if no Building Permit has been issued.

14. INTERPRETATION; SEVERABILITY; CORRECTIONS

All pronouns contained in this Ordinance and any variations of such pronouns will be deemed to refer to the masculine, feminine, or neutral, singular or plural, as the applicable context may require. The singular includes the plural, and the plural includes the singular. The word "or" is not exclusive. The words "include," "includes" and "including" are not limiting. Any reference to a particular law, statute, rule, regulation, code or resolution includes the law, statute, rule, regulation, code or resolution now in force or as later amended. The provisions of this Ordinance are declared to be severable. If any section, subsection, sentence, clause or portion of this Ordinance is for any reason held invalid, unenforceable or unconstitutional, such invalid, unenforceable or unconstitutional section, subsection, sentence, clause or portion will (a) yield to a construction permitting enforcement to the maximum extent permitted by applicable law, and (b) not affect the validity, enforceability, or constitutionality of the remaining portion of this Ordinance. This Ordinance may be corrected at any time by resolution of the Board to cure editorial or clerical errors, or to comply with applicable law.

15. EFFECTIVE DATE

The SDCs authorized by this Ordinance shall be imposed on development applications submitted on or after July 1, 2025.

16. REPEAL

This Ordinance supersedes, replaces and restates Ordinance No.12, in its entirety, and supersedes all ordinances, resolutions or policies in conflict with this Ordinance. Ordinance No. 12 is repealed.

BOARD AGENDA COMMUNICATION

AGENDA DATE:	June 3, 2025
SUBJECT:	Adopt Resolutions No. 2025-04, 2025-05, 2025-06, 2025-07 and 2025-08 relating to System Development Charges (SDC)
STAFF RESOURCE:	Kristin Toney, Administrative Services Director Sara Anselment, Planner Brian Hudspeth, Planning & Development Director
GUEST PRESENTER:	Deb Galardi, Galardi Rothstein Group
PREVIOUS BOARD ACTION:	June 4, 2019 - Resolution No. 421 – Adopting a Methodology for Calculating Park System Development Charges, Resolution No. 422 – Adopting an SDC Projects List, Resolution No. 424 Adopting Procedures for Entering into Developer Recovery Agreements and Resolution No. 425 – Adopting a Fee Schedule for System Development Charges; May 20, 2025 - Public hearing on 2025 Methodology and First Reading of Ordinance 13
ACTION PROPOSED:	Adopt Resolutions No. 2025-04, 2025-05, 2025-06, 2025-07 and 2025-08 relating to System Development Charges starting July 1, 2025
STRATEGIC PLAN:	
Service:	Service
Goal:	Steward fiscal resources, and further environmental and social sustainability.
Strategy:	Use financial modeling and other planning tools to holistically evaluate, plan and forecast necessary expenditures for system expansion, operations, and maintenance.

BACKGROUND

As part of mid-term comprehensive plan update the district is updating its park SDC project list, fees, and ordinance. Galardi Rothstein Group was the consultant used in 2019 to update the district's park SDC methodology, project list and fees, and they most recently prepared an update of the city of Bend's sewer, water, and transportation SDCs. The district is again using Galardi Rothstein Group because of their familiarity with the district and the city SDC programs.

Specific project tasks are as follows:

- SDC Analysis: Existing acreage and facility inventories were updated to reflect acquisitions and improvements since 2018. Future Park acreage, trail mileage, and indoor recreation facility square footage are based on BPRD's revised project list from the 2024 Comprehensive Plan Midterm Update.
- Develop Unit Costs and SDC Schedules: The reimbursement and improvement costs attributable to growth were divided by the total number of people to be served, which includes future residents and nonresident visitors. Updated population and visitor projections reflect the 2024 Comprehensive Plan mid-term update assumptions and other available information.
- Documentation: The updated SDC calculations and project list are documented in the 2025 Park SDC Methodology Report prepared by the Galardi Rothstein Group. The report describes the steps and assumptions used to determine the SDC-eligible project costs and fee schedule. The report also includes the updated project list and maximum allowable fee schedule as appendices.
- Review BPRD's SDC ordinance: The existing ordinance was reviewed for housekeeping and other changes to align with needed clarifications and evolving legal requirements.

These resolutions listed below, along with the new ordinance, are the results of these tasks for the project. These resolutions are necessary to implement the district's updated SDC program.

Resolution No. 2025-04 adopts the 2025 Methodology Report: Parks System Development Charges.

Resolution No. 2025-05 adopts the SDC Capital Projects List.

Resolution No. 2025-06 is the SDC fee schedule and will be updated annually to reflect changes in indexed construction and land acquisition costs, or administrative costs.

Resolution No. 2025-07 identifies the fees and interest for SDC deferrals.

Resolution No. 2025-08 adopts the procedures for entering into developer recovery agreements, which is the same as the prior Resolution No. 424 but is updated to reference Ordinance No. 13. These agreements allow the district to reimburse the developer for dedication or construction of park and recreation facilities using a portion of the SDCs collected within a designated recovery area.

BUDGETARY IMPACT

SDCs are the main source of funding for the development of parks, trails and recreation facilities to serve growth. The ordinance defines the district's SDC program. Depending upon how the ordinance is applied there could be a fiscal impact.

STAFF RECOMMENDATION

Staff recommend adoption of the five resolutions, which together with Ordinance No.13, complete this SDC update project.

MOTIONS

These are five separate motions to be voted on individually.

- 1. I move to adopt Resolution No. 2025-04, Adopting a Methodology for Calculating System Development Charges effective July 1, 2025.**
- 2. I move to adopt Resolution No. 2025-05, Adopting an SDC Capital Projects List effective July 1, 2025.**
- 3. I move to adopt Resolution No. 2025-06, Adopting a Fee Schedule for System Development Charges effective July 1, 2025.**
- 4. I move to adopt Resolution No. 2025-07, Adopting a Fee for System Development Charge Deferrals effective July 1, 2025.**
- 5. I move to adopt Resolution No. 2025-08, Adopting Procedures for Entering into Developer Recovery Agreements effective July 1, 2025.**

ATTACHMENTS

1. Attachment A – Resolution No. 2025-04, Adopting a Methodology for Calculating System Development Charges, Exhibit A Methodology Report: Parks System Development Charges
2. Attachment B – Resolution No. 2025-05, Adopting an SDC Capital Projects List, Appendix A SDC Capital Projects List
3. Attachment C – Resolution No. 2025-06, Adopting a Fee Schedule for System Development Charges
4. Attachment D – Resolution No. 2025-07, Adopting a Fee for System Development Charge Deferrals
5. Attachment E – Resolution No. 2025-08, Adopting Procedures for Entering into Developer Recovery Agreements

BPRD RESOLUTION NO. 2025-04**A RESOLUTION OF THE BEND PARK AND RECREATION DISTRICT BOARD OF DIRECTORS
TO ADOPT A METHODOLOGY FOR CALCULATING SYSTEM DEVELOPMENT CHARGES**

WHEREAS, in October 2024, the Bend Park and Recreation District (the "District") Board of Directors (the "Board") adopted an updated comprehensive plan for the development of capital improvements to meet community needs; and

WHEREAS, to provide the necessary funding for the comprehensive plan capital improvements, the Board began the process of updating the District's System Development Charge ("SDC") program; and

WHEREAS, the Board, after notice and public hearing, adopted Ordinance No. 13 - System Development Charges (the "Ordinance") on June 3, 2025, to be effective July 1, 2025; and

WHEREAS, pursuant to the Ordinance and ORS 223.304, the District must adopt a methodology to establish reimbursement fees and improvement fees for collection and expenditure as part of the District SDC program; and

WHEREAS, In September 2024, the District began the process of developing an update to its SDC methodology and sought input from interested stakeholders through informal meetings; and

WHEREAS, the District published a draft SDC methodology report for public review in March 2025, at least 60 days prior to the first hearing on the draft methodology and received no substantive comments.

NOW, THEREFORE, the Board of Directors hereby resolves as follows:

1. The Board finds that the assumptions and methods for calculating park SDCs described in the attached Exhibit A, Methodology Report: Parks System Development Charges are in the public's interest and necessary to serve future park needs of the residents of the District; and
2. The Methodology Report: Parks System Development Charges, attached as Exhibit A, is hereby adopted; and
3. This Resolution shall take effect on July 1, 2025.
4. Miscellaneous. All pronouns contained in this Resolution, and any variations of such pronouns, will be deemed to refer to the masculine, feminine or neutral, singular or plural, as the applicable context may require. The singular includes the plural, and the plural includes the singular. The word "or" is not exclusive. The words "include," "includes" and "including" are not limiting. Any reference to a particular law, statute, rule, regulation, code or resolution includes the law, statute, rule, regulation, code or resolution now in force or as later amended. The provisions of this Resolution are declared to be severable. If any section, subsection, sentence, clause or portion of this Resolution is for any reason held invalid, unenforceable or unconstitutional, such invalid, unenforceable or unconstitutional section, subsection, sentence, clause or portion will (a) yield to a construction permitting enforcement to the maximum extent permitted by applicable law, and (b) not affect the validity, enforceability or constitutionality of the

remaining portion of this Resolution. This Resolution may be corrected at any time by resolution of the board to cure editorial or clerical errors, or to comply with applicable law.

ADOPTED by the Board of Directors of the District on this 3rd day of June, 2025.

Jodie Schiffman, Board Chair

Attest:

Michelle Healy, Executive Director

Methodology Report

Final Parks System Development Charges

May 15, 2025



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Acknowledgements

This report was prepared with the assistance of the following key individuals.

Bend Park and Recreation Staff

Michelle Healy, Executive Director
Kristin Toney, Administrative Services Director
Brian Hudspeth, Director of Planning & Development
Henry Stroud, Principal Planner
Sara Anselment, Park Planner

Consultant

Deb Galardi, Galardi Rothstein Group

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-unit 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-unit residential based on six (6) living area size tiers. Charge multi-unit and other housing and overnight accommodation units based on a flat rate per unit.	Statistical analysis of local data shows average occupancy increases with size of single-unit homes. The six-tier structure is consistent with the City of Bend's SDC structures. Implementation issues differ between single-unit and other units; The City of Bend uses a uniform rate per unit for multi-unit 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:

$$\frac{\text{Existing}Q + \text{Planned}Q}{\text{FuturePopulationServed}} = \text{PlannedLOS}$$

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 overnight 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 overnight accommodation 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-unit, multi-unit, and manufactured dwellings).

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-unit” analysis was conducted specifically on data for single detached units, while multi-unit reflects analysis for structures with two or more units.

3.3.1 Single-Unit Dwelling

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-unit residential dwelling units, which as shown in Table 3-2, averages 2.5 persons per dwelling unit.

Table 3-2. Single-Unity Dwelling Unit Occupancy

Category	Avg. People per Dwelling Unit ¹
<i>Single-Unit (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 Multi-Unit Dwelling

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

Table 3-3. Multi-Unit Dwelling Unit Occupancy

Category	Avg. People per Dwelling Unit
All Multi-Unit Dwelling Sizes ¹	1.78

¹ 2020 ACS PUMS for Deschutes County, weighted average for all multi-unit households

3.3.3 Other Housing

Table 3-4 presents occupancy assumptions for other types of housing. Occupancy for manufactured dwellings is based on 2017 ACS data for Deschutes County. Accessory Dwelling Units (ADUs) will be assessed based on the same occupancy as a 0 bedroom multi-unit dwelling (based on ACS data).

Table 3-4. Occupancy Assumptions - Other Housing

Category	Avg. People per Unit
Manufactured Dwellings (per dwelling) ¹	2.26
Accessory Dwelling Units (per unit) ¹²	1.08

¹ 2017 ACS for Deschutes County

² Based on Multi-Unit 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 Accommodations

Occupancy assumptions for overnight accommodations are based on estimated persons per 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 overnight accommodation 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	Quantity	Unit	Improvement SDC	
		(Years)			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-Unit Dwellings

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	
2300	2.45	2.51
2400	2.47	
2500	2.49	
2600	2.51	
2700	2.52	
2800	2.54	
2900	2.56	
3000	2.58	
3100	2.59	2.74
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-Unit 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
Multi-Unit ⁴ Avg. (\$/dwelling unit)	1.78	\$8,478	\$8,589
Other Housing			
Manufactured Dwelling (\$/dwelling)	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 Accommodation Unit (\$/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-unit includes tiny homes

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

BPRD RESOLUTION NO. 2025-05**A RESOLUTION OF THE BEND PARK AND RECREATION DISTRICT BOARD OF DIRECTORS ADOPTING AN SDC CAPITAL PROJECTS LIST**

WHEREAS, on June 3, 2025, the Board of Directors (the "Board") for the Bend Park and Recreation District (the "District") adopted Ordinance No. 13 - System Development Charges (the "Ordinance"), which authorizes the District to assess and collect System Development Charges ("SDCs"), and Resolution No. 2025-04 - Adopt a Methodology for Calculating System Development Charges; and,

WHEREAS, pursuant to ORS 223.309 and Ordinance Section 5.G, the Board must adopt a Capital Projects List of the capital improvements to be funded wholly or in part by SDCs; and,

WHEREAS, the Capital Projects List must include the estimated costs, timing and percentage of costs for each improvement that the District intends to fund, in whole or in part, with improvement fee revenues.

NOW, THEREFORE, the Board of Directors hereby resolves as follows:

1. Appendix A, SDC Project List, shall be adopted as the SDC Capital Projects List.
2. Pursuant to the Ordinance, the SDC Capital Projects List may be modified at any time by separate resolution adopted by the District Board.
3. Miscellaneous. All pronouns contained in this Resolution, and any variations of such pronouns, will be deemed to refer to the masculine, feminine or neutral, singular or plural, as the applicable context may require. The singular includes the plural, and the plural includes the singular. The word "or" is not exclusive. The words "include," "includes" and "including" are not limiting. Any reference to a particular law, statute, rule, regulation, code or resolution includes the law, statute, rule, regulation, code or resolution now in force or as later amended. The provisions of this Resolution are declared to be severable. If any section, subsection, sentence, clause or portion of this Resolution is for any reason held invalid, unenforceable or unconstitutional, such invalid, unenforceable or unconstitutional section, subsection, sentence, clause or portion will (a) yield to a construction permitting enforcement to the maximum extent permitted by applicable law, and (b) not affect the validity, enforceability or constitutionality of the remaining portion of this Resolution. This Resolution may be corrected at any time by resolution of the board to cure editorial or clerical errors, or to comply with applicable law.

ADOPTED by the Board of Directors of the District on this 3rd day of June, 2025.

Jodie Schiffman, Board Chair

Attest:

Michelle Healy, Executive Director

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%
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Talline	New park land acquisition & development	1-5	4	acres	\$1,563,719	100%
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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

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		(Years)			Cost (\$)	%
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Park Search Area 29 - Neighborhood Park	New park land acquisition & development	1-5	4	acres	\$2,721,242	100%
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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%
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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		Unit	Improvement SDC	
		(Years)	Quantity		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.

BPRD RESOLUTION NO. 2025-06**A RESOLUTION OF THE BEND PARK AND RECREATION DISTRICT BOARD OF DIRECTORS ADOPTING A FEE SCHEDULE FOR SYSTEM DEVELOPMENT CHARGES**

WHEREAS, June 3, 2025, the Board of Directors (the “Board”) for the Bend Park and Recreation District (the “District”) adopted Ordinance No. 13 - System Development Charges, authorizing the assessment and collection of System Development Charges (“SDCs”) and Resolution No. 2025-04-Adopt a Methodology for Calculating System Development Charges; and

WHEREAS, Ordinance No. 13 allows the District to establish SDC fees necessary to serve future public park needs of the residents of the District; and

WHEREAS, the terms “Single-unit Dwelling,” “Multi-unit Dwelling,” “Manufactured Dwelling,” “Accessory Dwelling Unit,” “Dormitory” and “Overnight Accommodations Unit” are defined in Ordinance No. 13, and

WHEREAS, the District incurs costs associated with administering the SDC program, including internal administration (such as fees related to the District’s formal objection and appeal processes) as well as payments to the City of Bend and Deschutes County to collect the park SDCs on behalf of the District (the “Administrative Costs”)

NOW, THEREFORE, the Board of Directors hereby resolves as follows:

1. The District’s SDCs for the period July 1, 2025 through June 30, 2026 shall be imposed at the full amount allowed under the adopted Methodology, and shall be:

Single-Unit Dwelling - Non-tiered Average Fee (\$12,063)

Single-Unit Dwelling - (< 600 square feet)	\$	8,444
Single-Unit Dwelling - (601 - 1,200 square feet)	\$	9,699
Single-Unit Dwelling - (1,201 - 1,600 square feet)	\$	10,712
Single-Unit Dwelling - (1,601 - 2,200 square feet)	\$	11,436
Single-Unit Dwelling - (2,201 - 3,000 square feet)	\$	12,111
Single-Unit Dwelling - (> 3,000 square feet)	\$	13,221
Multi-Unit Dwelling	\$	8,589
Accessory Dwelling Unit	\$	5,211
Overnight Accommodations Unit	\$	9,023
Manufactured Dwelling	\$	10,905
Dormitory (per person)	\$	4,825

2. Effective on July 1 of each subsequent year, the formula for adjusting the District’s SDC fees annually as set forth in the Methodology, Section 3.4.1 Inflationary Adjustments, shall be applied to the then-current SDC amounts and the resulting fees imposed.
3. The District’s additional fees Costs for the period July 1, 2025 through June 30, 2025 shall be:

- | | |
|-------------------------|------------|
| a. Formal Objection Fee | \$500.00 |
| b. Appeal Fee | \$1,000.00 |
4. Effective on July 1 of each subsequent year, the Administrative Costs will also be adjusted to reflect current costs by the City of Bend, Deschutes County, or the District to collect park SDC fees.
 5. Miscellaneous. All pronouns contained in this Resolution, and any variations of such pronouns, will be deemed to refer to the masculine, feminine or neutral, singular or plural, as the applicable context may require. The singular includes the plural, and the plural includes the singular. The word “or” is not exclusive. The words “include,” “includes” and “including” are not limiting. Any reference to a particular law, statute, rule, regulation, code or resolution includes the law, statute, rule, regulation, code or resolution now in force or as later amended. The provisions of this Resolution are declared to be severable. If any section, subsection, sentence, clause or portion of this Resolution is for any reason held invalid, unenforceable or unconstitutional, such invalid, unenforceable or unconstitutional section, subsection, sentence, clause or portion will (a) yield to a construction permitting enforcement to the maximum extent permitted by applicable law, and (b) not affect the validity, enforceability or constitutionality of the remaining portion of this Resolution. This Resolution may be corrected at any time by resolution of the board to cure editorial or clerical errors, or to comply with applicable law.

ADOPTED by the Board of Directors of the District on this 3rd day of June, 2025.

Jodie Schiffman, Board Chair

Attest:

Michelle Healy, Executive Director

BPRD RESOLUTION NO. 2025-07**A RESOLUTION OF THE BEND METRO PARK AND RECREATION DISTRICT BOARD OF DIRECTORS
ADOPTING A DEFERRAL PROGRAM RECOVERY FEE FOR SYSTEM DEVELOPMENT CHARGES**

WHEREAS, June 3, 2025, the Board of Directors (the “Board”) for the Bend Park and Recreation District (the “District”) adopted Ordinance No. 13 - System Development Charges, authorizing the assessment and collection of System Development Charges (“SDCs”); and

WHEREAS, Ordinance No. 13 allows the District to establish an SDC deferral program and application and recovery fees associated with the SDC deferral program.

NOW, THEREFORE, the Board of Directors hereby resolves as follows:

1. The District’s SDC deferral program fees for the period July 1, 2025 through June 30, 2026 shall be:
 - a) Program Application Fee - \$0
 - b) SDC Deferral Program Recovery Fee -- 2% assessed on total District SDC fees deferred by applicant.
2. Miscellaneous. All pronouns contained in this Resolution, and any variations of such pronouns, will be deemed to refer to the masculine, feminine or neutral, singular or plural, as the applicable context may require. The singular includes the plural, and the plural includes the singular. The word “or” is not exclusive. The words “include,” “includes” and “including” are not limiting. Any reference to a particular law, statute, rule, regulation, code or resolution includes the law, statute, rule, regulation, code or resolution now in force or as later amended. The provisions of this Resolution are declared to be severable. If any section, subsection, sentence, clause or portion of this Resolution is for any reason held invalid, unenforceable or unconstitutional, such invalid, unenforceable or unconstitutional section, subsection, sentence, clause or portion will (a) yield to a construction permitting enforcement to the maximum extent permitted by applicable law, and (b) not affect the validity, enforceability or constitutionality of the remaining portion of this Resolution. This Resolution may be corrected at any time by resolution of the board to cure editorial or clerical errors, or to comply with applicable law.

ADOPTED by the Board of Directors of the District on this 3rd day of June, 2025.

Jodie Schiffman, Board Chair

Attest:

Michelle Healy, Executive Director

BPRD RESOLUTION NO. 2025-08**A RESOLUTION OF THE BEND PARK AND RECREATION DISTRICT BOARD OF DIRECTORS ADOPTING PROCEDURES FOR ENTERING INTO DEVELOPER RECOVERY AGREEMENTS**

WHEREAS, pursuant to ORS 223.309, the District has adopted Ordinance No. 13 – System Development Charges; and

WHEREAS, Ordinance No. 13 allows the District to enter into agreements with developers who propose to expand the park system by dedicating or constructing park and recreation facilities; and

WHEREAS, those agreements would allow the District to repay the developer for such improvements using a portion of the SDCs collected in a designated recovery area; and

WHEREAS, Ordinance No. 13 indicates the intention to adopt this resolution in Section 9.C.

NOW, THEREFORE, the Board of Directors hereby resolves as follows:

1. The Procedures for Developer Recovery Agreements, attached hereto as Exhibit A, are hereby adopted;
2. The Exhibit A Procedures for Developer Recovery Agreements shall be periodically updated for consistency with Ordinance No. 13, and all other policies and procedures of the District.
3. Miscellaneous. All pronouns contained in this Resolution, and any variations of such pronouns, will be deemed to refer to the masculine, feminine or neutral, singular or plural, as the applicable context may require. The singular includes the plural, and the plural includes the singular. The word “or” is not exclusive. The words “include,” “includes” and “including” are not limiting. Any reference to a particular law, statute, rule, regulation, code or resolution includes the law, statute, rule, regulation, code or resolution now in force or as later amended. The provisions of this Resolution are declared to be severable. If any section, subsection, sentence, clause or portion of this Resolution is for any reason held invalid, unenforceable or unconstitutional, such invalid, unenforceable or unconstitutional section, subsection, sentence, clause or portion will (a) yield to a construction permitting enforcement to the maximum extent permitted by applicable law, and (b) not affect the validity, enforceability or constitutionality of the remaining portion of this Resolution. This Resolution may be corrected at any time by resolution of the board to cure editorial or clerical errors, or to comply with applicable law.
4. This Resolution shall take effect on July 1, 2025.

ADOPTED by the Board of Directors of the District on this 3rd day of June, 2025.

Jodie Schiffman, Board Chair

Attest:

Michelle Healy, Executive Director

EXHIBIT A: DEVELOPER RECOVERY PROCEDURES AND PAYMENTS

The following procedures will govern the use and implementation of agreements with developers who propose to expand the park system by dedicating or constructing park and recreation facilities. The purpose of these agreements would be to allow the District to repay the developer for such improvements using a portion of the SDCs collected in a designated recovery area.

- A. Developers who wish to expand the park system by dedicating or constructing park and recreation facilities may do so under the following conditions.
 - 1. Prior District approval is granted for the construction of park or trail improvements, including those considered as a qualified improvement for the expenditure of SDC improvement fees.
 - 2. An executed agreement between the developer and District is approved by all parties and sets forth the development requirements and SDC recovery, if available.
 - 3. All improvements are constructed according to applicable District and City standards, rules and regulations, including the District's adopted ten-year comprehensive plan, as determined by the District.
 - 4. The developer shall pay the cost of such improvements.
 - 5. The developer's costs of construction for qualified improvements may be eligible for SDC recovery payments as provided in Ordinance No. 13.
- B. The area to be served by the park facilities constructed by the developer will be considered a sole or shared recovery area. A sole recovery area will be determined to include that portion of the developer's property that is served by the qualified improvements constructed by the developer. A shared recovery area will include additional areas outside the sole recovery area which are also served by the qualified improvements pursuant to District standards.
- C. SDC improvement fees collected within the sole or shared recovery area shall be remitted to the developer of the qualified improvement until the developer's cost is recovered or until the ten-year recovery period has expired, whichever occurs first. The sole or shared recovery area amount shall be established by the development agreement.
- D. The District's obligation to pay or apply SDC recovery fees shall be limited to SDC improvement fees actually collected by the District as provided in this policy. District's obligation to pay or apply SDC recovery fees shall be further limited to the total recovery fee calculated as provided in this policy. Persons who receive, or are entitled to claim, SDC recovery fees shall indemnify and hold the District harmless in the event the District is subject to claims by others for SDC recovery fees or credits for the same improvements.

- E. The payment schedule and conditions for SDC recovery fees shall be as follows:
 - 1. SDC recovery fee payments shall be made annually by the District from SDC improvement fees collected by the District from properties in the recovery area from July 1 through June 30 of the District's fiscal year. The payments shall be disbursed by July 31 of the following fiscal year.
 - 2. No interest shall accrue on SDC recovery payments payable to developers.
 - 3. There shall be no adjustments made to the amount of any SDC recovery payment as a result of inflation.
- F. The amount of the SDC recovery payment shall be determined as follows:
 - 1. The recovery payment shall be available only for qualified public improvements as defined in ORS 223.304(3) and as defined in this exhibit.
 - 2. The recovery payment shall be made only from the improvement fee portion of the SDC, as calculated in the methodology referenced in this exhibit.
 - 3. The amount of the recovery payment shall not exceed the improvement fee as calculated above.
- G. Qualified costs of park improvements may include the fair market value of dedicated land as established by appraisal, actual construction costs, including actual expenditures for engineering or surveying, and a reasonable allowance for administrative expenditures.

BOARD AGENDA COMMUNICATION

AGENDA DATE:	June 3, 2025
SUBJECT:	Public Budget Hearing, Adoption of the 2025-26 Budget, and Imposing and Categorizing Taxes
STAFF RESOURCE:	Kristin Toney, Administrative Services Director
PREVIOUS BOARD ACTION:	The 2024-25 budget was adopted by the board on June 4, 2024.
COMMITTEE ACTION:	The 2025-26 proposed budget was approved by the Budget Committee on May 13, 2025.
ACTION PROPOSED:	Hold a public hearing to take comment on the proposed FY 2025-26 budget, adopt Resolution No. 2025-09 Adopting the Budget and Making Appropriations for Fiscal Year 2025-26, and adopt Resolution No. 2025-10 Imposing and Categorizing Taxes.
STRATEGIC PLAN:	
Service:	Service
Goal:	Steward fiscal resources, and further environmental and social sustainability.
Strategy:	Use financial modeling and other planning tools to holistically evaluate, plan and forecast necessary expenditures for system expansion, operations, and maintenance.

BACKGROUND

The Proposed 2025-26 Budget was made public May 2, 2025, and presented at the Budget Committee May 13, 2025. The Bend Park and Recreation District Budget Committee (Budget Committee) voted unanimously to approved the budget and to send the proposed budget to the Bend Park and Recreation District Board of Directors (board) for consideration. The proposed budget is being presented as approved by the Budget Committee with no additional staff changes.

The State of Oregon Local Budget Law requires a public hearing be held to discuss the budget as approved by the Budget Committee. After receiving public comment, the board shall close the public hearing.

After such time, the staff will present the approved budget to the board, and will recommend the budget's adoption. The board may adopt the budget as approved, or may make changes based upon public comment, staff recommendations or other reasons. By Oregon statute, no increases to expenditures may be greater than 10% of the total approved expenditures in any fund, without the

budget requiring another public hearing. Expenditures in any fund can be reduced, without limitation, as long as resources and requirements in the fund remain in balance. Other than re-balancing, if necessary, no additional process steps are required when expenditures are reduced.

After the public hearing and the staff presentation, the governing body must enact the proper resolutions to adopt the budget, make appropriations, and impose and categorize the taxes. The resolution adopting the budget should state the total amount of all the budget requirements, and a schedule of appropriations must be included. This schedule provides the local government with legal spending authority throughout the fiscal year.

Per Oregon Revised Statute (ORS) 294.435(1), local governments that are using ad valorem property taxes to balance their budgets must declare the tax rate by resolution. The resolution should state the rate being certified to the county assessor. Property taxes are imposed for the tax year on the assessed value of all taxable property within the district. The district's permanent tax rate is \$1.461 per \$1,000 assessed value. The amount approved by the budget committee to be levied for the General Obligation Bond debt service for the upcoming fiscal year is \$2,165,371.

The governing body must also declare through resolution the tax limitation category into which each of the local government's tax is to be placed. This resolution must show the rate of ad valorem tax for the district's permanent rate tax, and the amount for debt service for general obligation bond debt service.

BUDGETARY IMPACT

The district's Fiscal Year 2025-26 budget is a balanced budget with healthy reserves for planned future projects and maintaining assets. The proposed budget is anticipating \$50.4 million in revenues and \$75.5 million in expenditures for total budgeted requirements of \$119 million, which includes contingencies and reserves. This budget will support 301 full-time equivalent (FTE) employees for \$27.6 million and has \$36.2 million in capital spending.

STAFF RECOMMENDATION

Staff recommend that the board adopt Resolution No. 2025-09 adopting the budget and making appropriations for fiscal year 2025-26.

Staff also recommend that the board adopt Resolution No. 2025-10 imposing and categorizing taxes for fiscal year 2025-26 for the district's permanent rate tax and for debt service for general obligation bonds.

MOTION

These are two separate motions that need to be voted on individually:

Motion #1: I make a motion to adopt Resolution No. 2025-09 Adopting the Budget and Making Appropriations for Fiscal Year 2025-26.

Motion #2: I make a motion to adopt Resolution No. 2025-10 Imposing and Categorizing Taxes for Fiscal Year 2025-26.

ATTACHMENT

1. Resolution No. 2025-09 Adopting the Budget and Making Appropriations
2. Resolution No. 2025-10 Imposing and Categorizing Taxes

BMPRD RESOLUTION NO. 2025-09**A RESOLUTION OF THE BEND METRO PARK AND RECREATION DISTRICT BOARD OF DIRECTORS
ADOPTING THE BUDGET AND MAKING APPROPRIATIONS****ADOPTING THE BUDGET**

BE IT RESOLVED that the Board of Directors of the Bend Metro Park and Recreation District hereby adopts the budget for fiscal year 2025-26 in the total amount of \$119,894,030.

MAKING APPROPRIATIONS

BE IT RESOLVED that the amounts for the fiscal year beginning July 1, 2025 and for the purposes shown below are hereby appropriated:

General Fund

Administration	\$ 4,750,900
Planning and Development	1,705,000
Community Engagement	2,175,650
Park Services	9,417,850
Recreation Services	18,231,880
Interfund Transfers	6,000,000
Contingency	-
Total Appropriations	42,281,280

Rental Fund

Rental Program	518,030
Interfund Transfers	600,000
Contingency	100,000
Total Appropriations	1,218,030

System Development Charges Special Revenue Fund

Planning and Development	17,189,460
Interfund Transfers	908,500
Contingency	2,000,000
Total Appropriations	20,097,960

Facility Reserve Fund

Planning and Development	18,432,200
Parks Services	193,890
Recreation Services	35,000
Contingency	1,000,000
Total Appropriations	19,661,090

Equipment Reserve Fund

Community Engagement	40,000
Parks Services	385,170
Recreation Services	227,900
Contingency	250,000

Total Appropriations	903,070
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GO Bond Debt Service Fund

Debt Service	2,175,340
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Total Appropriations	2,175,340
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Total Bend Metro Park and Recreation District

Total appropriations including contingency	86,336,770
Total unappropriated and reserve amounts	33,557,260

Total Bend Metro Park and Recreation District Budget	<u>\$ 119,894,030</u>
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Miscellaneous. All pronouns contained in this Resolution, and any variations thereof, will be deemed to refer to the masculine, feminine, or neutral, singular or plural, as the context may require. The singular includes the plural and the plural includes the singular. The word "or" is not exclusive. The words "include," "includes," and "including" are not limiting. The provisions of this Resolution are severable. If any section, subsection, sentence, clause, or portion of this Resolution is for any reason held invalid, unenforceable, or unconstitutional, such invalid, unenforceable, or unconstitutional section, subsection, sentence, clause, or portion will (a) yield to a construction permitting enforcement to the maximum extent permitted by applicable law, and (b) not affect the validity, enforceability, or constitutionality of the remaining portion of this Resolution. This Resolution may be corrected by resolution of the board to cure editorial or clerical errors.

ADOPTED by the Board of Directors of the District on this 3rd day of June 2025.

Jodie Schiffman, Board Chair

Attest:

Michelle Healy, Executive Director

BMPRD RESOLUTION NO. 2025-10**A RESOLUTION OF THE BEND METRO PARK AND RECREATION DISTRICT BOARD OF DIRECTORS
IMPOSING AND CATEGORIZING TAXES****IMPOSING THE TAX**

BE IT RESOLVED that the Board of Directors of the Bend Metro Park and Recreation District hereby imposes the following ad valorem property taxes for tax year 2025-26 upon the assessed value of all taxable property within the District:

1. At the rate of \$1.461 per \$1,000 of assessed value for permanent rate tax; and
2. In the amount of \$2,165,371 for debt service for general obligation bonds.

CATEGORIZING THE TAX

BE IT RESOLVED that the taxes imposed are hereby categorized for purposes of Article XI section 11b as:

General Government Limitation

Permanent Rate Tax.....\$1.461 / \$1,000

Excluded from Limitation

General Obligation Bond Debt Service\$2,165,371

Miscellaneous. All pronouns contained in this Resolution, and any variations thereof, will be deemed to refer to the masculine, feminine, or neutral, singular or plural, as the context may require. The singular includes the plural and the plural includes the singular. The word "or" is not exclusive. The words "include," "includes," and "including" are not limiting. The provisions of this Resolution are severable. If any section, subsection, sentence, clause, or portion of this Resolution is for any reason held invalid, unenforceable, or unconstitutional, such invalid, unenforceable, or unconstitutional section, subsection, sentence, clause, or portion will (a) yield to a construction permitting enforcement to the maximum extent permitted by applicable law, and (b) not affect the validity, enforceability, or constitutionality of the remaining portion of this Resolution. This Resolution may be corrected by resolution of the board to cure editorial or clerical errors.

ADOPTED by the Board of Directors of the District on this 3rd day of June 2025.

Jodie Schiffman, Board Chair

Attest:

Michelle Healy, Executive Director

BOARD AGENDA COMMUNICATION

AGENDA DATE:	June 3, 2025
SUBJECT:	Resolution 2025-11 Adopting the Five-Year Capital Improvement Plan for Fiscal Years Ending 2026-2030
STAFF RESOURCE:	Brian Hudspeth, Director of Planning & Development Kristin Donald, Administrative Services Director
PREVIOUS BOARD ACTION:	The board last adopted the Capital Improvement Plan on June 4, 2024.
ACTION PROPOSED:	Adopt Resolution No. 2025-11, Adopting the Five-Year Capital Improvement Plan for Fiscal Years Ending 2026-2030.
STRATEGIC PLAN:	
Priority:	Service
Goal:	Support the recreational needs of an evolving community through programming, parks, trails and facilities.
Strategy:	Maintain adopted levels of service targets for parks, trails and facilities.

BACKGROUND

The district's Capital Improvement Plan (CIP) identifies and summarizes all approved and proposed district capital expenditures and revenue sources for a period of five years into the future. The board of directors revises and adopts the district's five-year CIP during the annual budget process. The CIP summary for fiscal years ending 2026-2030, attached to Resolution No. 2025-11 as Exhibit A, was presented to the budget committee on May 13, 2025.

BUDGETARY IMPACT

The 2026-2030 Capital Improvement Plan totals \$86,674,713 in planned capital expenditures. \$51,434,154 (59%) is funded with System Development Charge revenues, \$31,359,923 (36%) is funded with property tax revenues, and \$3,880,636 (5%) is funded with alternative funding.

STAFF RECOMMENDATION

Staff recommend adoption of Resolution No. 2025-11 adopting the Five-Year Capital Improvement Plan for Fiscal Years Ending 2026-2030.

MOTION

I make a motion to adopt Resolution No. 2025-11, adopting the Five-Year Capital Improvement Plan for fiscal years ending 2026-2030.

ATTACHMENTS

1. Resolution No. 2024-11 Adopting the Five-Year Capital Improvement Plan for Fiscal Years Ending 2026-2030
2. Exhibit A: Five-Year Capital Improvement Plan Summary for Fiscal Years Ending 2026-2030

BPRD RESOLUTION NO. 2025-11
A RESOLUTION ADOPTING THE BEND PARK AND RECREATION DISTRICT FIVE-YEAR CAPITAL
IMPROVEMENT PLAN FOR FISCAL YEARS ENDING 2026-2030

WHEREAS, pursuant to ORS 223, the Bend Park and Recreation District adopted a Capital Improvement Plan (“CIP”) on June 4, 2024 with BPRD Resolution No. 2024-05, and

WHEREAS, the board has re-examined the park and facility needs for the district and finds that the projects identified on the attached Exhibit A: Bend Park and Recreation District Five Year Capital Improvement Plan for Fiscal Years Ending 2026-2030 are in the public interest and necessary to serve park, recreation, facility and trail needs of the district; and

WHEREAS, the board adopted Ordinance No. 13, and Resolution No. 2025-04, A Methodology for Calculating Systems Development Charges, indicating the intention to adopt this resolution.

NOW, THEREFORE, the Board of Directors hereby resolves as follows:

1. The Bend Park and Recreation District Five Year Capital Improvement Plan for Fiscal Years Ending 2026-2030, attached hereto as Exhibit A, is hereby adopted.
2. The CIP includes those projects that are needed to serve the park, recreation facility and trail needs of district residents in fiscal years ending June 30, 2026-2030 including future needs related to residential growth and development as specified in Ordinance No. 13 and Resolution No. 2025-04 pursuant to ORS 223.
3. The CIP identifies both those projects and portions of projects eligible to be funded using System Development Charge (“SDC”) revenue as well as those projects funded by other revenue sources. Those expenditures from the SDC Improvement Fee fund and the SDC Reimbursement Fee fund shall be accounted for separately in accordance with statutory requirements for the use of SDC revenues.

ADOPTED by the Board of Directors of the district on this 3rd day of June 2025.

Jodie Schiffman, Board Chair

Attest:

Michelle Healy, Executive Director

Bend Park and Recreation District
Five-Year Capital Improvement Plan (CIP)
for Fiscal Years Ending 2026-2030

											FY2026-30 Funding Allocation by Source									
Project Type	Fiscal Year Added	Project Number	Page Number	Project Map	Project Stage	Approved Property Tax Revenue	Approved SDC Funds	Approved Alternative Funds	Approved Funding Allocation	Prior and Current Fiscal Years	Property Tax Revenue	SDC	Alternative	Alt. Type	Total FY 26-30	FY 25-26 Total	FY 26-27 Total	FY 27-28 Total	FY 28-29 Total	FY 29-30 Total
Community Parks																				
Pine Nursery Park Ph. 4 (Pending Partnership)	2014-15	013	19	1	Design Development		78,504		78,504	27,784	-	50,720	-		50,720	50,720	-	-	-	-
Pine Nursery Park Ph. 5	2014-15	014	20	2	Construction Documents	350,000	8,000,000	400,000	8,750,000	640,764	350,000	7,359,236	400,000	2	8,109,236	6,940,236	1,169,000	-	-	-
Sawyer Park	2019-20	158	21	3	Construction Documents	904,287	-	2,048,326	2,952,613	371,085	1,129,712	-	1,451,816	1	2,581,528	2,017,528	564,000	-	-	-
Total Community Parks						1,254,287	8,078,504	2,448,326	11,781,117	1,039,833	1,479,712	7,409,956	1,851,816		10,741,484	9,008,484	1,733,000	-	-	-
Neighborhood Parks																				
Land Acquisitions	2014-15	017	22	N/A	Order of Magnitude		11,600,000		11,600,000	-	-	11,600,000	-		11,600,000	1,900,000	1,700,000	3,500,000	2,500,000	2,000,000
Manzanita Ridge Park	2020-21	173	23	4	Bid Award		1,767,510		1,767,510	978,279	-	789,231	-		789,231	789,231	-	-	-	-
Park Search Area 5 (Talline)	2022-23	189	24	5	Order of Magnitude		1,517,500		1,517,500	-	-	1,517,500	-		1,517,500	-	250,000	1,267,500	-	-
Park Search Area 11 (Discovery West Park/TH)	2021-22	156	25	6	Order of Magnitude		2,923,050		2,923,050	829,526	-	2,093,524	-		2,093,524	-	750,000	850,000	493,524	-
Park Search Area 14 (Parkside Place)(Bear Creek)	2019-20	191	26	7	Order of Magnitude		2,176,400		2,176,400	-	-	2,176,400	-		2,176,400	850,000	400,000	800,000	126,400	-
Park Search Area 24 (Stevens Ranch)	2021-22	192	27	8	Order of Magnitude		1,684,178		1,684,178	-	-	1,684,178	-		1,684,178	-	-	300,000	1,384,178	-
Park Search Area 27 (Constellation Crest)	2022-23	190	28	9	Order of Magnitude		2,888,000		2,888,000	-	-	2,888,000	-		2,888,000	880,000	750,000	1,258,000	-	-
Park Search Area 28 (Easton) (SE Area Plan)	2021-22	193	29	10	Order of Magnitude		2,128,763		2,128,763	-	-	2,128,763	-		2,128,763	928,763	1,000,000	200,000	-	-
Park Search Area 18 (Coulter Property)	2024-25	206	30	11	Order of Magnitude		1,750,000		1,750,000	140,000	-	1,610,000	-		1,610,000	360,000	950,000	300,000	-	-
Park Search Area 15	2024-25	208	31	12	Order of Magnitude		2,400,000		2,400,000	-	-	2,400,000	-		2,400,000	-	2,400,000	-	-	-
Park Search Area 20 (Pinebrook Property)	2024-25	209	32	13	Order of Magnitude		1,500,000		1,500,000	50,000	-	1,450,000	-		1,450,000	300,000	550,000	600,000	-	-
Park Search Area 26	2024-25	210	33	14	Order of Magnitude		1,725,000		1,725,000	-	-	1,725,000	-		1,725,000	475,000	-	-	600,000	650,000
Park Search Area 6	2024-25	TBD	34	15	Order of Magnitude		3,000,000		3,000,000	-	-	3,000,000	-		3,000,000	-	-	-	3,000,000	-
Park Search Area 32	2024-25	TBD	35	16	Order of Magnitude		100,000		100,000	-	-	100,000	-		100,000	-	-	100,000	-	-
Total Neighborhood Parks						-	37,160,401	-	37,160,401	1,997,805	-	35,162,596	-		35,162,596	6,482,994	8,750,000	9,175,500	8,104,102	2,650,000
Trails																				
DRT Galveston to Millers Landing	2014-15	033	36	17	Design Development		800,000		800,000	443,275	-	356,725	-		356,725	356,725	-	-	-	-
Riley Ranch Nature Reserve Bridge	2017-18	082	37	18	Design Development		1,200,000		1,200,000	-	-	1,200,000	-		1,200,000	-	-	-	1,200,000	-
DRT Putnam to Riley Ranch	2014-15	036	38	19	Order of Magnitude		155,000		155,000	440	-	154,560	-		154,560	-	-	154,560	-	-
DRT Kirkaldy to Putnam	2014-15	037	39	20	Order of Magnitude		63,100		63,100	3,662	-	59,438	-		59,438	-	59,438	-	-	-
Deschutes River Trail North Trailhead	2016-17	083	40	21	Order of Magnitude		320,000		320,000	-	-	320,000	-		320,000	-	20,000	300,000	-	-
Miscellaneous Trails	2019-20	041	41	N/A	Order of Magnitude		1,450,000		1,450,000	-	-	1,450,000	-		1,450,000	300,000	300,000	250,000	300,000	300,000
North Unit Irrigation Canal Trail (NUID)	2020-21	176	42	22	Design Development		512,000		512,000	325,061	-	186,939	-		186,939	186,939	-	-	-	-
COHCT Reed Mkt To Hansen Park	2022-23	199	43	23	Order of Magnitude		425,175		425,175	-	-	425,175	-		425,175	-	275,175	150,000	-	-
South UGB Access & Connections	2025-26	TBD	44	24	Order of Magnitude		250,000		250,000	-	-	250,000	-		250,000	200,000	50,000	-	-	-
Big Sky Trail (Hwy 20 Undercrossing 5)	2025-26	TBD	45	25	Order of Magnitude		50,000		50,000	-	-	50,000	-		50,000	50,000	-	-	-	-
Total Trails						-	5,225,275	-	5,225,275	772,438	-	4,452,837	-		4,452,837	1,093,664	704,613	854,560	1,500,000	300,000
Regional / Community Wide																				
Art Station	2023-24	200	46	26	Construction Documents		4,300,000		4,300,000	241,235	-	4,058,765	-		4,058,765	3,058,765	1,000,000	-	-	-
Millers Landing Access Project	2024-25	204	47	27	Bid Award			1,325,000	1,325,000	1,275,000	-	-	50,000	1,2,5	50,000	50,000	-	-	-	-
Columbia Park Access Project	2024-25	205	48	28	Construction Documents			788,820	788,820	160,000	-	-	628,820	1,2,5	628,820	598,820	30,000	-	-	-
Natural Area Land Acquisition	2024-25	212	49	29	Order of Magnitude	850,000		850,000	1,700,000	-	850,000	-	850,000	1,2	1,700,000	1,700,000	-	-	-	-
Bend Whitewater Park Maint. & McKay River Access Project	2023-24	185	50	30	Conceptual Design	1,300,000		-	1,300,000	140,833	1,159,167	-	-	-	1,159,167	845,380	313,787	-	-	-
SE Bend Regional Park Site (Rose Property)	2023-24	202	51	31	Order of Magnitude	4,250,000		400,000	4,650,000	4,145,853	104,147	-	400,000	5	504,147	104,147	400,000	-	-	-
Total Community Wide						6,400,000	4,300,000	3,363,820	14,063,820	5,962,921	2,113,314	4,058,765	1,928,820		8,100,899	6,357,112	1,743,787	-	-	-
Asset Management Projects																				
Accessibility Improvements	2014-15	052	52	N/A	Order of Magnitude	625,000			625,000	-	625,000	-	-		625,000	125,000	125,000	125,000	125,000	125,000
Asset Management Projects (\$5,000-\$50,000)	2014-15	071	59	N/A	Order of Magnitude	1,015,000			1,015,000	-	1,015,000	-	-		1,015,000	315,000	200,000	200,000	150,000	150,000
Park Services Complex	2014-15	054	54	32	Construction Documents	11,150,000			11,150,000	260,899	10,889,101	-	-		10,889,101	10,517,821	371,280	-	-	-
Skyline Field Renovation	2014-15	056	55	33	Order of Magnitude	625,000			625,000	279,135		345,865	-		345,865	345,865	-	-	-	-
Hollinshead Park ADA & Preferred Design	2014-15	159	56	34	Construction Documents	750,000	250,000	100,000	1,100,000	218,069		781,931	-	100,000	4	881,931	70,856	-	811,075	-
Ponderosa Park (North)	2019-20	163	57	35	Order of Magnitude	850,000	350,000		1,200,000	-		850,000	350,000		1,200,000	-	-	-	-	1,200,000
Pavilion Flooring Replacement	2023-24	TBD	58	36	Conceptual Design	202,000			202,000	52,000		150,000	-		150,000	-	150,000	-	-	-
JSFC Outdoor Roof Cover Replacement and Renovation Proj	2024-25	219	59	37	Order of Magnitude	9,670,000			9,670,000	-		9,670,000	-		9,670,000	700,000	8,970,000	-	-	-
Sylvan Playground Replacement	2024-25	207	60	38	Conceptual Design	600,000			600,000	90,000		510,000	-		510,000	510,000	-	-	-	-
Providence Park Renovation	2024-25	TBD	61	39	Order of Magnitude	1,200,000			1,200,000	-		1,200,000	-		1,200,000	-	-	400,000	800,000	-
Larkspur Park Playground Renovation	2024-25	TBD	62	40	Order of Magnitude	500,000			500,000	-		500,000	-		500,000	500,000	-	-	-	-
Stover Park Renovation	2024-25	TBD	63	41	Order of Magnitude	500,000			500,000	-		500,000	-		500,000	-	-	500,000	-	-
Old Bend Gym - Wall Renovation	2025-26	214	64	42	Order of Magnitude	665,000			665,000	100,000		565,000	-		565,000	565,000	-	-	-	-
Columbia Park Playground Surfacing Replacement	2025-26	TBD	65	43	Order of Magnitude	75,000			75,000	-		75,000	-		75,000	-	-	75,000	-	-
Old Bend Gym - Roof Replacement	2025-26	TBD	66	42	Order of Magnitude	90,000			90,000	-		90,000	-		90,000	-	-	-	-	90,000
Total Asset Management Projects						28,517,000	600,000	100,000	29,217,000	1,000,103	27,766,897	350,000	100,000		28,216,897	13,649,542	9,816,280	2,111,075	1,075,000	1,565,000
Total CIP Funding Allocations						36,171,287	55,364,180	5,912,146	97,447,613	10,772,900	31,359,923	51,434,154	3,880,636		86,674,713	36,591,796	22,747,680	12,141,135	10,679,102	4,515,000

- 1 - Grant Funding
2 - Contributions, Collaborations, Fundraising
3 - Debt Financing
4 - Facility Rental Special Revenue Fund
5 - Reimbursement SDCs

BOARD AGENDA COMMUNICATION

AGENDA DATE:	June 3, 2025
SUBJECT:	Design-Build Contract Award for Juniper Swim and Fitness Outdoor Pool Cover Replacement and Renovation Project
STAFF RESOURCE:	Brian Hudspeth, Director of Planning & Development Matt Mercer, Recreation Services Director
PREVIOUS BOARD ACTION:	April 1, 2025, adopted Resolution No. 2025-01 – Design Build Alternative Form of Contracting Method for Juniper Swim and Fitness Outdoor Pool Cover Replacement and Renovation Project
ACTION PROPOSED:	Award Contract for Design-Build Services
STRATEGIC PLAN:	
Priority:	Service
Goal:	Maintain quality, clean and safe parks, trails and facilities.
Strategy:	Take care of what we have by prioritizing investment in existing assets.

BACKGROUND

The framed-fabric structure covering the 50-meter pool at Juniper Swim & Fitness Center was first installed in 1997 over an old outdoor 40-yard pool. The structure was re-used and expanded in 2006 as part of the JSFC renovation and expansion project which included a new 50-meter pool. Since the initial installation, most of the fabric has been removed each summer to create an open-air, outdoor pool environment. This process has become increasingly difficult as the structure ages. This would be the fourth generation of fabric purchased for the structure as the fabric has an 8 to 10-year lifecycle with our climate and use.

Due to the age of the structure, increasing problems with the installing and removing panels, and the fact that the original manufacturer is no longer in business, the district decided to consider alternate options before investing considerable funds in the current structure. After discussion with the board during the 2025 board workshop, staff proposed an alternative delivery method to design and construct a new structure for the pool and complete additional renovations to the 50-meter pool walls, locker rooms and other related building repairs.

On April 1, 2025 the board of directors adopted Resolution No. 2025-01, which exempt the project from competitive bidding and directed staff to use the progressive design-build contracting method. The project work is to be designed and constructed in two phases, preconstruction and construction.

On April 3, 2025, the district advertised the Juniper Swim and Fitness Outdoor Pool Structure Replacement and Renovation project as a progressive design-build project. A mandatory pre-proposal meeting was held for all prospective proposers on April 10, 2025. Proposals were opened on May 1, 2025. The following proposal for preconstruction services was received:

Pence Contractors:	Pre-Construction fee - \$355,576
Kirby Nagelhout Construction Co.	Pre-Construction fee - \$596,328

After evaluation of the proposals Pence Contractors was the highest scoring proposer and a notice of intent to award was issued on May 12, 2025.

BUDGETARY IMPACT

The 2026-30 Capital Improvement Plan (CIP) allocates \$9,670,000 of property tax revenue for this project. The remaining funds left in the CIP will be used for construction, permitting and other miscellaneous costs. The district will likely need to issue debt to fund the construction.

The preconstruction phase consists of the preliminary investigation, design, and permitting necessary for construction of the project. At each stage of design, cost estimates shall be developed requiring approval by the district prior to moving onto the next design evolution. At such time as the construction documentation is ready, the district will request that a guaranteed maximum price (GMP) be developed for the project. When the GMP is accepted by the district, the contract will be amended accordingly, and the project will move from the preconstruction phase into the construction phase. The construction phase will include the construction, commissioning, and turnover of the completed facilities to the district.

STAFF RECOMMENDATION

Staff recommend that the board award the design-build contract to Pence Contractors with preconstruction services fee for \$355,576. Staff further recommends the board approve a 10% contingency of \$35,558 for a total preconstruction budget not to exceed \$391,134.

MOTION

I move to authorize the executive director to award a progressive design-build contract to Pence Contractors for design and construction of the Juniper Swim and Fitness Outdoor Pool Structure Replacement and Renovation project with a preconstruction services fee of \$355,576, and to approve an additional 10% preconstruction contingency of \$35,558, for a total preconstruction budget not to exceed \$391,134.

ATTACHMENT

None



Board of Directors Meeting Summary

May 20, 2025

District Office Building | 799 SW Columbia | Bend, Oregon

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BOARD PRESENT

Donna Owens
Cary Schneider
Deb Schoen
Nathan Hovekamp

BOARD ABSENT

Jodie Schiffman

The BPRD board of directors met on May 20 and held a public hearing and first reading of an updated System Development Charges (SDC) Ordinance. A [video recording](#) of the meeting is available.

System Development Charges (SDC) Ordinance

SDCs are the main source of funding for the development of new parks, trails and recreation facilities to serve growth. The methodology determines the fees charged and the ordinance defines the district's SDC program's application and administration. The existing SDC methodology and ordinance was approved in 2019.

Following the approval of the mid-term comprehensive plan update, the district began an update to the SDC program including the methodology, project list, fees and ordinance.

On February 19, 2025, as required by ORS 223.304, district staff provided the 90-day notice to interested parties of the May 20, 2025, public hearing for the new SDC methodology. Staff issued additional notice on March 19, 2025, that the proposed 2025 SDC Methodology Report was available for review through the district's website. The district did not receive any comments on the Methodology Report during the 60-day public review period. The Board subsequently opened a public hearing to allow for presentation and public comment; however, no public comments were received.

Key updates to the proposed Ordinance include:

- Interpretation of Development Types: Added language that district staff can interpret the best category for development types not clearly defined in the ordinance. This helps as housing and overnight accommodations nomenclature continues to evolve.

- Multi-Unit Dwellings: Clarified that multiple dwelling units on a shared lot, regardless of whether they share a wall or not, are multi-unit dwellings.
- Single-Unit Dwellings: Defined rowhouses or townhomes on individual lots as single-unit dwellings regardless of whether they share a wall or not.
- Shelters: Defined homeless, domestic violence, and other emergency-type shelters to help administer waivers or exemptions more clearly.
- Overnight Accommodations Developments: Further defined developments that serve overnight accommodations.
- Payment Deferrals: Aligned payment deferrals for residential development with the city's deferral process for sewer, water, and transportation SDCs.

The second reading is scheduled for June 3, 2025, and if adopted, the board would also consider adoption of five related resolutions for the SDC methodology report, project list, fee schedule, deferral fees, and developer agreements.

Director Schneider made a motion to conduct the first reading of Ordinance No. 13 – System Development Charges by title only. Director Hovekamp seconded. The motion passed unanimously, 4-0. (Hovekamp, Schneider, Schoen, Owens)

Paul Taylor read the Ordinance 13 by title only

Director Hovekamp made a motion to accept the first reading by title only. Director Schneider seconded. The motion passed unanimously, 4-0. (Hovekamp, Schneider, Schoen, Owens)

Gilchrist Bridge design

By consent, the board approved a contract amendment related to design for the Gilchrist Bridge. Gilchrist Bridge is a city of Bend owned, wooden pedestrian bridge that links Riverfront Street to Columbia Park and forms a key connection between the Deschutes River Trail and the city's Low-Stress Bicycle & Pedestrian Network.

To begin investigating potential future bridge upgrade or full replacement, the district and the city entered an agreement that committed the district to manage and fund—using a \$90,000 Bend Metropolitan Planning Organization (MPO) Surface Transportation Block Grant—the conceptual design phase of the bridge replacement while the city granted site access and provides technical review.

In January 2023, the board of directors approved a professional services contract for the design work to be added to the scope of services for the Columbia Park renovation project. That work is now substantially complete, leaving \$10,000 of the MPO grant unspent.

Staff proposed and the board approved using the remaining grant balance for a final contract amendment with ESA to produce photo-realistic renderings based on the 30 percent plans. At

this time, the City of Bend does not have funding sources identified or a timeline for replacing the bridge.

Director Hovekamp made a motion to approve the consent agenda. Director Schneider seconded. The motion passed unanimously, 4-0. (Hovekamp, Schneider, Schoen, Owens)

Staff introduction

To begin the meeting, the board of directors was introduced to a new employee, Baylee Gregor, Human Resources Business Partner.

The next board meeting is June 3.



PLANNING & DEVELOPMENT PROJECT UPDATES June 2025

COMMUNITY AND REGIONAL PARK PROJECTS



Pine Nursery Park Phase 5: The project has been advertised for bid and the bids are due in early July. It is anticipated the construction contract will be brought to the board for approval at the first meeting in August.

This project will construct the final features identified in the approved development plan for this highly used community park. Project work includes athletic field lighting, artificial turf infields, pickleball courts, new trail connectivity, ADA access improvements, off-leash dog area improvements, maintenance area improvements, landscaping and irrigation. Budget permitting, the project may also include full-court basketball, pickleball court lighting and pedestrian trail lighting.
<https://www.bendparksandrec.org/project/pine-nursery-park-phase-5/>



Sawyer Park Upgrades: The draft memorandum of agreement (MOA) is in the process of being finalized and prepared for signature. Once the MOA is signed, the agreement for the Land and Water Conservation Fund (LWCF) grant can be completed and the project advertised for bid.

Decades of use and increased visitors to the park created the need for an improved entrance and parking lot. The plans include relocating the parking area closer to O.B. Riley Road, adding accessible parking, habitat restoration, improving trail accessibility, and the addition of a permanent restroom, picnic shelter and river overlook. This project is funded in part by grants from the Land and Water Conservation Fund and the Local Government Grant Program.
<https://www.bendparksandrec.org/project/sawyerparkupgrades/>

NEIGHBORHOOD PARK PROJECTS



Manzanita Ridge: Site grading and irrigation are underway, and concrete work and pathway construction are ongoing throughout the site. The park is expected to be complete this fall.

This property will provide a new neighborhood park for surrounding residents in Shevlin West. The preferred concept design includes open lawn, picnic facilities, a shade shelter, play areas, soft surface and paved trails, benches, bike parking, and ADA designated street parking. A trailhead for the Manzanita Trail is also located in the park.
<https://www.bendparksandrec.org/project/shevlin-west/>

TRAIL PROJECTS



North Unit Canal Trail – Phase 1: The crossing improvements at Brinson Road are nearly complete. The district has acquired two of the three necessary trail easements to complete the easement acquisitions between Canal Row Park and Deschutes Market Road and is in active negotiation with the third landowner.

This trail in northeast Bend is planned to be a 10-foot-wide multi-use trail with a primarily compacted gravel surface, similar to other canal trails in Bend, while some portions will have asphalt surface. Phase 1 includes the development of the trail between Canal Row Park and the future extension of Yeoman Road, which will also provide access to Pine Nursery Park. The segment of the trail that passes through the new Pahlisch Homes Petrosa subdivision will be transferred to BPRD for management upon completion and will offer connections to interior trails for Fieldstone Park.

<https://www.bendparksandrec.org/project/northunitcanaltrail/>



Riverfront Street Deschutes River Trail Improvements: After receiving strong support from the public and BPRD, the City of Bend decided to proceed with the one-way design concept of Riverfront Street. The project will now enter the design phase, which will refine the one-way preliminary design for construction-ready design documents. Funding for construction has still not been identified, so a further timeline cannot be provided at this time.

Riverfront Street, between Galveston Avenue at Drake Park, to Miller’s Landing Park, is a local street with a sidewalk that has functioned as the DRT for many years. It is one of the last remaining “gaps” along the trail through downtown Bend. In 2023, BPRD and the city signed an intergovernmental agreement as a joint effort led by the City of Bend and supported by BPRD. The renewed project will seek to improve conditions for trail users as well as replace the street and other public infrastructure as needed. <https://www.bendparksandrec.org/project/deschutes-river-trail-riverfront/>



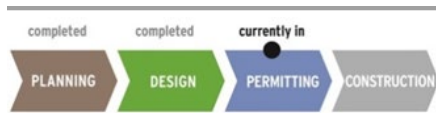
Manzanita Trail: The district acquired a 3.44-acre piece of property and the final easements necessary to complete the trail between Discovery Park and Shevlin Park. Construction on the final trail segments is underway and is expected to be completed early this summer.

COMMUNITY/REGIONAL PROJECTS



Miller’s Landing Park River Access Project: Construction continues on both access points at Miller’s Landing Park. All in-water work is complete, and currently new landscape elements are being installed, as well as repairs to the existing park. The access points and DRT are on track to be opened to the public in June.

After opening in 2014, the access points no longer serve the population as intended. The new design improves river access for boaters and river users with mobility restrictions by redeveloping the boardwalk, and the access point at the north end of the park will be improved for swimming, wading and slower-current water recreation. The preferred concept design was completed and approved under the 2023 McKay, Miller’s, and Columbia Park River Access and Restoration project. Funding for the construction of this project includes grant funds from the Bend Sustainability Fund, the Oregon State Marine Board Waterway Access Grant Program, Oregon’s Local Government Grant Program, and a donation from the Joseph & Elizabeth Hoffart Charitable Foundation. <https://www.bendparksandrec.org/project/millers-landing-river-access-project/>



Art Station: The project is still in the permitting process and staff are responding to comments from the review of the commercial building permit. Bid documents are being prepared as it is expected that the project will go out to bid soon.

This new facility will be built adjacent to the basketball court at Larkspur Park. It will have an entry space, three classrooms, office space, and restrooms. The surrounding natural space and trails will be a beneficial asset to the Art Station for inspiration and space to create, while preserving the landscape and trail experience to the fullest extent possible.

<https://www.bendparksandrec.org/project/art-station/>



Bend White Water Park Maintenance and McKay Park River Access Project: Additional data analysis and site survey have been completed by the consultants and those results have been shared with district staff. Updates to the existing conditions report are underway and will be presented to the board soon. Meeting coordination with regulatory agencies is being pursued and expected to occur this summer.

Completed in 2016, the Whitewater Park is due for review and maintenance. The first phase of this project will use survey and engineering analysis to compare the current functions of the park with the original design intent. Once the reports are complete, the district will determine a scope of work for a project to update and improve the whitewater park features. The project also includes improving river access for all users at McKay Park. The preferred concept design was completed and approved in 2023 under the McKay, Miller's, and Columbia Park River Access and Restoration project.

<https://www.bendparksandrec.org/project/bend-whitewater-park-maintenance-and-mckay-park-access/>



Columbia Park River Access Project: Staff will present before the City Planning Commission in early June at the WOZ hearing. Other permit applications at both the state and federal level continue to work their way through the process, while cultural and historical analysis of the park site, and coordination with local, state, federal and tribal representatives continue. The anticipated start date for construction currently remains this coming winter of 2025/2026.

The preferred concept design includes bank improvements to enhance the natural area within this reach of river frontage. Also included is a small, hardened access point for river users to enter and exit the river, or to sit and relax by the water. This project was prioritized from the 2018 Deschutes River Access and Habitat Restoration Plan and the preferred concept design was completed under the 2023 McKay, Miller's, and Columbia Park River Access project.



Southeast Bend Regional Park Site: Final deliberations by the Board of County Commissioners will be held on May 28, 2025. The commissioner's decision will be followed by a 21-day appeal period before the ordinance becomes effective.

Purchased in 2023, this large property of approximately 450 acres was acquired for future community park needs as the city expands in the southeast area.

ASSET MANAGEMENT PROJECTS



Park Services Complex: Construction documents are in progress and the permit applications will be submitted at the end of this month.

The district has executed a purchase and sale agreement (PSA) with the City of Bend for the purchase of their existing utility shop on Boyd Acres Road to become the new Park Services site. This PSA allows the city to occupy the facility until their new facility is complete, which is anticipated at the end of 2025. The district is developing a design for tenant improvements to be constructed once the district takes ownership of the property.



Hollinshead Park ADA and Preferred Concept Design: The design team continues to work on, and refine, construction documents. Construction is estimated to begin in 2027.

Knowing the importance of this historic property, community members and BPRD staff worked together in 2010 to develop a preferred concept plan for the future of the property. Improvements for the park include a new permanent restroom, ADA-compliant pathways, renovation of the parking area, enclosing the off-leash area, a “history walk” with interpretive signs in collaboration with the Deschutes Historical Society, and a maintenance report to preserve the park’s structures.

<https://www.bendparksandrec.org/project/hollinshead-park/>



Sylvan Park Playground Renovation: Playground concepts are being developed and will be presented to the neighborhood soon during the second round of outreach. Once that input is received, final design drawings will be completed. Construction is estimated to be complete by 2026.

The small wood-based playground was built in 1993, no longer serving the needs of the neighborhood. The district will replace the playground and surfacing and create an accessible route to the playground from the parking area.

<https://www.bendparksandrec.org/project/sylvan-park-playground-renovation/>



Old Bend Gym Wall Renovation: Construction documents are in progress and the permit applications will be submitted at the end of this month.

The Old Bend Gym is a historic building on the National Register of Historic Places. The building is owned by BPRD, operated by the Boys & Girls Club on property owned by the Bend-La Pine School District. The entry to the building from NW Wall Street utilizes an exterior staircase for access to the second floor. The structural wall supporting the staircase is failing and needs to be replaced.

OTHER PROJECTS AND FUTURE DEVELOPMENT

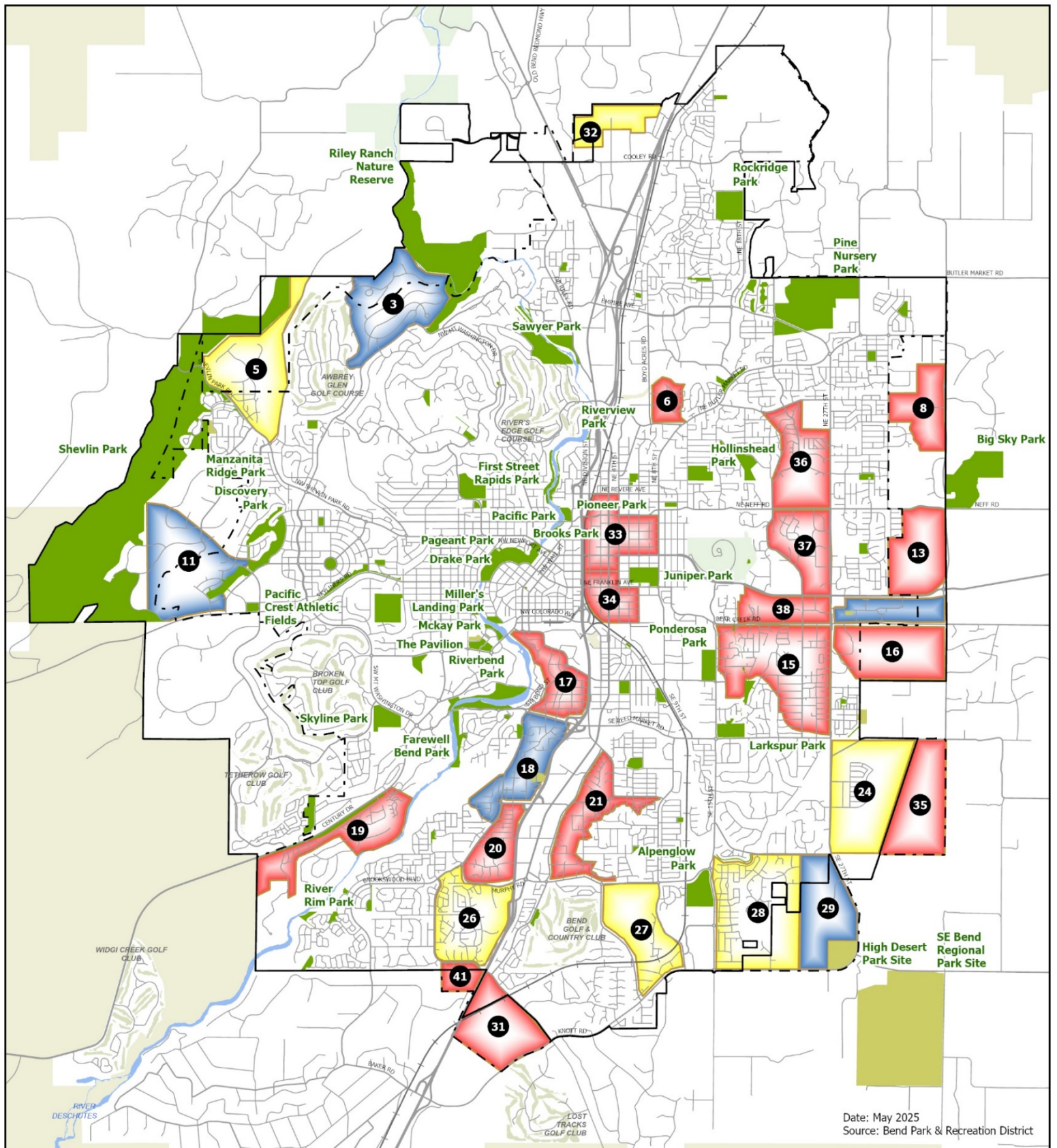
Park Search Area Planning: District planners regularly work with local developers or private property owners to acquire property for new parks and trails in district Park Search Areas as defined by the 2018 Comprehensive Plan: 2024 Midterm Update.

- The attached map displays the status of each of the 28 current park search areas. The search areas are in three categories: *Land Owned/Secured* represents search areas where the district has previously acquired land for park development or has an existing agreement for the purchase or transfer of land to the district. *Planning/Negotiation* represents search areas where the district is in current negotiations with the owner or the City of Bend to acquire a property. *Not Started* represents search areas where the district is not in active discussions or negotiations to acquire property.

Discovery Park Art Corridor: After the district approved the installation of up to four art pieces along the Outback Trail in Discovery Park, Brooks Resources received a \$100,000 grant from Visit Bend’s Sustainability Fund for the installation of three art pieces; two sculptures and a community labyrinth. The labyrinth has been completed, with the other two sculptures expected to be installed in 2025.

SDC Waivers for Affordable Housing: Park SDC waivers for 637 units have been approved through coordination with the City of Bend's Affordable Housing Committee at a cost to the district of about \$4.16 million in waived SDC fees. The board approved an additional 150 waivers for 2025 and 2026, none of which have been used yet. Staff and legal counsel have completed the necessary deed restriction documents for 15 of the developments, totaling 426 units. In addition, BPRD has approved SDC waivers for three temporary shelter projects, totaling 32 units.

Diversity, Equity and Inclusion (DEI) Initiative: The DEI committee is exploring the feasibility of forming affinity space for staff with historically minoritized identities.



- District Boundary
- Urban Growth Boundary
- Developed Park
- Undeveloped Park

- Park Search Area Status**
- Land Owned/Secured
 - Planning/Negotiation
 - Not Started



0 0.5 1 2
Miles



Park Services Bi-Annual Report-Winter 2024-2025

Park Services is responsible for the maintenance and operations of parks, trails, and facilities. Additional responsibilities include managing the asset replacement plan, implementing the ADA Transition Plan, overseeing district-wide fleet and equipment services, and supporting special events and recreation programs.

This is the first biannual Park Services report, intended to provide a high-level summary of work and projects completed between November 1, 2024, and April 30, 2025. During this period, each division focused on its area of expertise while also contributing to department-wide needs—such as snow removal—that require support from all Park Services staff.

Work is reported and managed in the computer maintenance management system (CMMS) Maintenance Connection. During this timeframe, 64% of work orders were for preventative maintenance (PM), while 36% addressed reactive work. Although reactive work cannot be entirely eliminated, a higher percentage of preventative maintenance is preferred. A strong preventative maintenance program offers numerous benefits, including increased efficiency, reduced emergency maintenance costs, enhanced safety, and extended asset lifespan and productivity.

The following page provides a snapshot of reported hours over the six-month period for specific tasks; however, it does not capture all work performed by the Park Services Department. Some tasks, such as landscape maintenance, are reported in both the winter and summer biannual reports, as they occur year-round. Others, such as snow removal and Zamboni maintenance, are specific to the winter report.

Highlighted below are major projects completed during this time:

- Installed a new camera network system at JSFC and Pavilion recreation facilities, improving security and safety for both patrons and employees.
- Constructed nearly one mile of the Manzanita Trail through the Discovery West development.
- Painted the Discovery pumphouse, restroom, and Aspen Hall; stained the footbridge along Discovery Trail in the Three Pines neighborhood.
- Conducted tree maintenance in Juniper, Ponderosa, Pine Nursery, and the majority of neighborhood parks, with a major focus on Eagle, Hillside, Sun Meadow, and Foxborough.
- Completed winter irrigation and water feature blow outs for over 60 parks.

We care for places where people play, learn and grow, and to protect our natural and cultural resources for the enjoyment of community residents..

NOVEMBER 2024 TO APRIL 2025



**Bend Park &
Recreation**
DISTRICT

3,629

**TOTAL ACRES OF PARKS AND
OPEN SPACES MAINTAINED**

113

**MILES OF DEVELOPED
TRAILS MAINTAINED**



1,099

**HOURS OF TRAIL
AND PATH
MAINTENANCE**



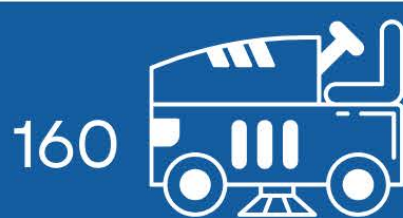
381

**HOURS OF
GRAFFITI REMOVAL**



1,880

**HOURS OF
SNOW REMOVAL**



160

**HOURS OF ZAMBONI
MAINTENANCE**



1,008

**HOURS OF
IRRIGATION
MAINTENANCE**



3,670

**HOURS OF
TRASH PICK UP**



540

**HOURS OF PLAYGROUND
INSPECTIONS
AND MAINTENANCE**



972

**HOURS OF
RECREATION
FACILITY
MAINTENANCE**



3,328

**CUSTODIAL HOURS
IN PARKS AND
RENTAL FACILITIES**



100

**PORTABLE
TOILETS
IN SERVICE**



1,231

**HOURS OF FUELS
REDUCTION**



6,930

**HOURS OF LANDSCAPE
MAINTENANCE**

15,522



**CUSTODIAL HOURS IN
RECREATIONAL FACILITIES**

Board Calendar 2025

**This working calendar of goals/projects is intended as a guide for the board and subject to change.*

JUNE 17

EXECUTIVE SESSION

EMPLOYEE RECOGNITION

Alli Jorgensen, Fitness Supervisor

- Char Schulz

STAFF INTRODUCTIONS

Michelle Healy, Executive Director

- Jase Newton, Recreation Services Director

WORK SESSION

- CAPRA Update – *Michael Egging (20 min)*
- Bend Whitewater Park Maintenance Project Update – *Ian Isaacson and Mason Lacy (60 min)*

CONSENT

- Approve Recreation Programming Plan

BUSINESS SESSION

- First Reading Park Rules and Regulation Ordinance No. 14 – *Julie Brown (20 min)*
- Approve Athletic Field and Sports Program Guidelines – *Becky Rexford (20 min)*
- Approve Amendment #1 of the Transportation Fee Collection IGA with the city of Bend – *Kristin Toney (10 min)*
- Approve Executive Director's Evaluation

JULY 1

EMPLOYEE RECOGNITION

Michelle Healy

- Matt Mercer

WORK SESSION

- Visit Bend Economic Value of Tourism Report Review – *Rachel Colton, Jeff Knapp, Nate Wyeth, Mark Buckley (30 min)*

BUSINESS SESSION

- Elect Board Chair and Vice-Chair
- Appoint Board Secretary
- Appoint Budget Officer
- Approve board meeting dates and time
- Second Reading and Approval of Park Rules Ordinance No. 14 – *Joel Lee (10 min)*

JULY 15

STAFF INTRODUCTIONS

Shannon Gilman

- Leigh Anne Dennis

WORK SESSION

- Goose Update– *Sasha Sulia (30 min)*

BUSINESS SESSION

FUTURE TOPICS

Website Update/Data Sharing – *Julie Brown*

IGA with NUID for canal trail – *Henry Stroud*

Approve SE Neighborhood Park Purchase and Sale Agreement – *Henry Stroud (20 min)*

DEI Update – *Bronwen Mastro*

Park Services Report: Hard surface Program – *Andy Sommerville and Jason Monaghan (15 min)*

Second Reading Park Rules and Regulation Ordinance 14 – *Julie Brown (10 min)*