



Bend Metro Park and Recreation District
800 NE 6th Street

Juniper Swim & Fitness Center



Bend Metro Park & Recreation District

March 18, 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.

play for life

District Office

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



Board of Directors

March 18, 2025

District Office Building | 799 SW Columbia | Bend, Oregon



AGENDA

4:00 pm BOARD SELF-EVALUATION – The board will meet ahead the regular board meeting to discuss their board self-evaluations.

Please use the link below to join the webinar for the board self-evaluation:

<https://us02web.zoom.us/j/81334745043?pwd=Q9YQu5OnkgmF7TfsKiITFNadB7nsbr.1>

Passcode:422924

The board will meet at 5:30 pm with virtual links to the work session and regular meeting. The public may provide public input in-person at the meeting or via the virtual Zoom link.

Please use the link below to join the webinar:

<https://us02web.zoom.us/j/82090205722?pwd=r2xxgqqmnmLhVTp9yi3zJyn8cyLI7.1>

Passcode:704100

Or Telephone:

1 669 900 6833

Webinar ID: 820 9020 5722

Passcode: 704100

5:30 pm CONVENE MEETING

ROLL CALL

VISITORS

The board welcomes input from individuals at our public meetings about district-related issues. Members of the community who wish to make public comment may attend the meeting in person or virtually. To provide a public comment in person, please fill out one of the brief cards and submit it to staff in the back of the room. To provide public comment virtually, click on the "Raise Hand" option. You will be called into the meeting in the order received. Virtual visitors should turn on their cameras and microphones. All remarks should be limited to 3 minutes or less. If there are questions, follow up will occur after the meeting. Thank you for your involvement.

WORK SESSION

1. Recreation Survey Results – *Matt Mercer and Kailyn Haskovec, RRC Associates (45 min)*
2. Overview of Placer.ai Software – *Quinn Keverer (20 min)*

CONSENT

1. ~~Approve Public Records Policy~~

BUSINESS SESSION

1. Approve Updated User Fees and Charges Policy – *Matt Mercer (30 min)*

BOARD MEETING SUMMARY – 3/4/2025

EXECUTIVE DIRECTOR’S REPORT

BOARD MEETINGS CALENDAR

GOOD OF THE ORDER

ADJOURN



Accessible Meeting/Alternate Format Notification

This meeting location is accessible. Sign and other language interpreter service, 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:	March 18, 2025
SUBJECT:	Recreation Programing Survey
STAFF RESOURCE:	Matt Mercer, Recreation Services Director
GUEST PRESENTER:	Kailyn Haskovec, RRC Associates
PREVIOUS BOARD ACTION:	None
ACTION PROPOSED:	None – for information only.
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 district recently conducted a survey to help identify the current and future needs and priorities for recreation programming in the community. The survey will inform a new 5-year Recreation Programming Plan that is currently underway. The last community recreation survey was conducted in 2019 and helped shape the 2020-25 Recreation Programming Plan.

The current survey was conducted in January and February by RRC Associates, a public research and analysis firm specializing in parks and recreation. The survey consisted of a statistically valid, representative sample followed by an open online option available for anyone to complete. The statistically valid sample was developed through a mail invite list with the option for people to respond via paper survey or online. Over 700 people responded, well above the number required to meet the desired margin of error. The open link survey was communicated through an e-mail sent to all households in the district registration system as well as promoted on the district website and in social media posts. The district received over 1,500 open link surveys,

RRC will present a summary of the methodology and results of the survey to the board during the work session. Staff will seek board input for the Recreation Programming Plan at the April 1, 2025 board meeting.

BUDGETARY IMPACT

The cost for the survey was \$25,000 and was included in the FY 2024-25 adopted budget.

STAFF RECOMMENDATION

None

MOTION

None

ATTACHMENT

None

BOARD AGENDA COMMUNICATION

AGENDA DATE:	March 18, 2025
SUBJECT:	Overview of Placer.ai Software
STAFF RESOURCE:	Quinn Keever, Park Planner
PREVIOUS BOARD ACTION:	None
ACTION PROPOSED:	None, for information only
STRATEGIC PLAN:	
Priority:	Service
Goal:	Maintain quality, clean and safe parks, trails and facilities
Strategy:	Develop and use data and best practices to increase work efficiency, and use benchmarks to track progress over time

BACKGROUND

Placer is a locations analytics company that provides data about visits and visitors to any location where people take their cell phones. The program uses data from hundreds of cell phones applications that people have opted to allow location services to be used. Placer uses anonymized location data to track foot traffic patterns without directly identifying individuals.

BPRD contracted with Placer to learn how people are using district parks and other key recreational areas around the community. The program enables staff to query topics such as the number of visits to any given park in a chosen period, average length of visits, origin/destination of park users, and park user demographics. This information can be used for district planning purposes, grant applications, recreational programming and various other applications.

During the board work session, staff will share information about the Placer data platform, the types of data that the district has access to, how they have used the data thus far, and how they plan to use it in the future.

BUDGETARY IMPACT

The fiscal year 2024 - 2025 cost for Placer is \$22,000 per year and is budgeted for in the Information Technology budget.

STAFF RECOMMENDATION

None

MOTION

None

ATTACHMENT

None

BOARD AGENDA COMMUNICATION

AGENDA DATE: March 18, 2025

SUBJECT: Public Records Policy

STAFF RESOURCE: Sheila Reed, Executive Assistant
Michelle Healy, Executive Director

PREVIOUS BOARD ACTION: Adopted Public Records, August 9, 2011 and June 18, 2019

ACTION PROPOSED: Adopt Updated Public Records Policy

BACKGROUND

The district last adopted the Public Records Policy in 2019, with a scheduled review every five years. Since no relevant laws have changed, no substantive updates were necessary. The proposed update includes minor capitalization adjustments and clarifications to enhance clarity.

Additionally, the Public Records Policy is a requirement of the Commission for Accreditation of Park and Recreation Agencies (CAPRA), which mandates regular policy reviews and updates to maintain accreditation.

Staff prepared a revised Public Records Policy with redlined changes for board review, incorporating these minor updates as Attachment A.

BUDGETARY IMPACT

None

STAFF RECOMMENDATION

Staff recommend approval of the updated Public Record Policy.

MOTION

I make a motion to adopt the Public Records Policy dated March 18, 2025.

ATTACHMENT

Attachment A – Public Records Policy (redline version)
Attachment B – Public Records Policy



Jodie Barram, Chair

Page 1 of 5

Public Records Policy

Purpose:

The purpose of this policy is to define process and procedures for providing accurate records to the public in a reasonable time.

Policy:

Bend Park and Recreation District will make available any public record requested by any person pursuant to ORS 192.314, provided that the record request is not exempt from disclosure under the provisions of ORS 192 or other laws.

Exempt Public Records:

Certain records are exempt from public disclosure pursuant to ORS 192.355 and ORS 192.368.

Partial list of exemptions applicable to the ~~District~~district:

- A. Records of public body pertaining to litigation;
- B. Information related to appraisal of real estate prior to acquisition;
- C. Information of a personal nature of public employees, volunteers or customers such as: Social Security numbers, dates of birth and telephone numbers;
- D. Any public records or information, which is prohibited by federal law of regulations;
- E. Communications with public body or between public bodies of an advisory nature;
- F. Confidential attorney – client communications;
- G. Information submitted in confidence and not otherwise required by law to be submitted.

Access:

The ~~District~~district shall permit inspection and examination of its non-exempt public records during regular business hours in the ~~District's~~district's ~~Offices~~offices at 799 SW Columbia ~~St.~~St., or other locations as the executive director may reasonably designate. Copies of non-exempt public records maintained in machine readable, or electronic form shall be furnished, if available, in the form requested and according to the procedures described in this policy. Records not available in the form requested shall be made available in the form in which they are maintained. ORS 192.324

Reviewer: executive director
Last Review Date: March 2025
Next Review Date: March 2030
Review Schedule: 5 Years

Public records may exist in any format, including in paper form or electronic form, including email. Messages on voicemail or on other telephone messages storage and retrieval systems are not public records. Text messages may constitute public records; however, the ~~District~~-[district](#) is not the custodian of these records. For that reason, employees are directed to not use text messages for official purposes other than routine communications that do not meet the definition of a public record. This policy applies to an employee's official mobile phone and personal mobile phone.

Authorization required for removal of original records:

At no time shall an original record of the ~~District~~-[district](#) be removed from the ~~District's~~-[district's](#) files or the place at which the record is regularly maintained, except when removal of the record complies with Oregon records retention laws.

Review of Records:

The ~~District~~-[district](#) will provide a copy of the public record or allow for reasonable opportunity to inspect the public record.

Board Meeting and Records:

Board of ~~Directors'~~-[directors'](#) official minutes, written policies and financial records are matters of public information subject to such restrictions as is set by federal law or regulation, by state statute or by pertinent court rulings. The ~~Board's~~-[board's](#) records will be available for inspection at the [Bend](#) Park and Recreation District Office, 799 SW Columbia [St.](#), during business hours, or a copy of such records may be made available upon request.

Record Requests:

In order to facilitate the public's access to ~~District~~-[district](#) records, and to avoid unnecessary expenditure of staff time, persons requesting access to public records for inspection, copying or disbursement or who submit written requests for copies of public records, shall specify the records requested with particularity, furnishing the dates, subject matter and such other detail as may be necessary to enable ~~d~~[D](#)istrict personnel to readily locate any responsive records.

No records will be released for inspection if such disclosure is exempt by state or federal law.

Levels of Requests

Level 1:

Requested documents include records that are current and readily available, require no duplication, and no additional staff time or resources to be available. These types of records are intended for public distribution, such as informational brochures, adopted ~~d~~[D](#)istrict plans, agendas, permit applications, job announcements, or election-related petitions. A Level 1 request does not require a written request or payment of a fee, and can be provided by any staff member.

Level 2:

Requested documents are not immediately available, but can be made available within 15 minutes of staff time. Requested records must be located in a single department, may not contain privileged information exempt by State law, and must not require attorney review prior to release. Requests must be submitted in writing, using the ~~District~~ [district](#) provided form and submitted to the executive director's office. There is no fee for this level of request.

Level 3:

Requested documents are complex and involve multiple staff and/or departments and/or require more than 15 minutes of staff time to compile. It may involve extensive research or compilation of records, and require legal review. Full reimbursement of labor, materials and out of pocket charges will be reimbursed to the ~~District~~ [district](#) according to the district fee schedule defined in this policy. Requests must be made in writing, using the ~~District~~ [district](#) provided form and submitted to the executive director's office.

Procedures:

Upon receipt of a request, the ~~d~~District will respond to the requestor within 5 working days. The response shall acknowledge receipt of the request and one of the following:

1. A statement that the district does not have or is not the custodian of the requested records.
 2. For Level 1 and Level 2 requests, a statement intending to provide responsive records within 10 business days.
 3. For Level 3 requests, a statement confirming custodianship, along with an estimated timeframe and fees, or a notice that an estimate of time and fees will be provided within 10 business days.
 4. A statement citing legal exemptions if disclosure is restricted.
 5. For large or unclear requests, the Public Records Officer will contact the requestor for clarification and may ask for prioritization and/or a narrowing of the scope.
- ~~— A statement that the district does not have or is not the custodian of the requested records.~~
- ~~— For Level 1 and Level 2 requests, a statement intending to provide responsive records within 10 business days.~~
- ~~— For Level 3 requests, a statement confirming custodianship, along with an estimated timeframe and fees, or a notice that an estimate of time and fees will be provided within 10 business days.~~
- ~~— A statement citing legal exemptions if disclosure is restricted.~~
- ~~— For large or unclear requests, the Public Records Officer will contact the requestor for clarification and may ask for prioritization and/or a narrowing of the scope.~~
- ~~1. A statement that the District does not possess or is not the custodian of the public record.~~
 - ~~2. Copies of all requested public records for which the District does not claim an exemption from disclosure under ORS 192.311 to 192.478 that are Level 1 or Level 2 requests within 10 business days.~~

- ~~3. A statement that the District is the custodian of at least some of the requested public records, an estimate of the time the District requires before the public records may be inspected and/or copies of the records will be provided, and an estimate of the fees that the requester must pay as a condition of receiving the public records, if the request is deemed to be a Level 3 request.~~
- ~~4. A statement that the District is the custodian of at least some of the requested public records, and that the District will provide an estimate, within a 10 business days, of the time and fees needed for disclosure of the public records.~~
- ~~5. A statement that the state or federal law exempts the District from disclosing a requested public record with the reason for the exemption.~~
- ~~6. All requests will be completed within 10 business days after issuing the acknowledgement, unless otherwise stated in the response to the record request.~~
- ~~7. When the District receives a request for many documents or an unclear request, the Public Records Officer will contact the requestor to clarify the request and explain the public records process. For large requests, the District may ask the requestor to prioritize the request for response.~~

Request Procedures:

The procedure for responding to the request will adhere to the following:

1. Upon receipt of a Level 2 or Level 3 public records request on the district-provided form, the executive director will review the request and if appropriate, assign staff to estimate time and resources involved in generating the records.
2. Should the executive director believe that the requested information ~~contain~~contains information that could be exempt from disclosure, the request will be forwarded to the ~~District's~~district's legal counsel for review and recommendation.
3. The estimate to produce the requested information will be provided to the requestor in written form (mail or email) if more than 10 business days are needed to produce the records.
4. If the requestor agrees to proceed with the request, the requestor will pay the estimated fee and sign the provided form agreeing to the terms of the payment.
5. Upon receipt of the fee, the ~~District~~district will generate the requested records. Preferred form of payment is a cashier's check. An un-guaranteed check must be cleared through the bank account before records are generated for the requestor. Should the estimated time and resources to generate the records be different than estimated, either a secondary bill or refund will be made.

Public Records Fee Schedule:

For a Level 3 request, the ~~d~~District will impose charges to reimburse the ~~District~~district for costs associated with producing the records, including, but not limited to, compiling, or producing records, costs of materials such a storage devises, hard copier or and other costs associated with reproducing the material.

1. Paper copies

The ~~District~~-[district](#) will provide up to a total of 30 standard, letter size, two-sided document copies of public records for citizens at no cost. Copies beyond 30 sheets will be charged the amount that is in line with the current state printing and distribution price list.

2. Postage

The ~~District~~-[district](#) will charge postage based on current postal rates.

3. Electronic copies:

There is no additional fee for ~~emailed~~-[electronic](#) copies.

4. Other costs:

Copies of recordings, maps and non-standard documents will be charged actual costs.

5. Internal Review Monitor:

Cost of employee(s) time assigned.

6. Legal Counsel Review:

Regular billing rate of the legal firm will apply to ~~records~~-[requests](#) that require legal review. Any legal costs associated with advising the ~~District~~-[district](#) on interpretation of this policy or the state open records statutes or guidelines will not be charged to the applicant.

Reduced Fee or Waivers:

The ~~District~~-[district](#) will accept requests for fee waivers or reductions for records requests. Requests must be in writing and addressed to the executive director. The ~~District~~-[district](#) will consider and grant reasonable requests to waive and/or reduce fees associated with fulfilling a public records request when doing so is in the public interest because providing access primarily benefits the general public, as defined in ORS 192.324. [Media representatives should not assume a waiver will be granted without review of a request.](#) The ~~District~~-[district](#) will waive the first 15 minutes of staff time needed to fulfill a records request.

The ~~District~~-[district](#) may deny eligibility for the 15-minute waiver if abuse by the requester is determined to exist either by:

- 1) Fragmenting a request that if taken in the aggregate would amount to significantly more than 15 minutes; or
- 2) Submitting multiple small requests in a short time-frame causing an undue burden on the agency.

References

ORS Chapter 192

Oregon Dept. of Justice, Oregon Attorney General's Model Contract Rules Manual



Jodie Barram, Chair

Page 1 of 5

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- D. Any public records or information, which is prohibited by federal law of regulations;
- E. Communications with public body or between public bodies of an advisory nature;
- F. Confidential attorney – client communications;
- G. Information submitted in confidence and not otherwise required by law to be submitted.

Access:

The district shall permit inspection and examination of its non-exempt public records during regular business hours in the district's offices at 799 SW Columbia St., or other locations as the executive director may reasonably designate. Copies of non-exempt public records maintained in machine readable, or electronic form shall be furnished, if available, in the form requested and according to the procedures described in this policy. Records not available in the form requested shall be made available in the form in which they are maintained. ORS 192.324

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Level 3:

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3. The estimate to produce the requested information will be provided to the requestor in written form (mail or email) if more than 10 business days are needed to produce the records.
4. If the requestor agrees to proceed with the request, the requestor will pay the estimated fee and sign the provided form agreeing to the terms of the payment.

5. Upon receipt of the fee, the district will generate the requested records. Preferred form of payment is a cashier's check. An un-guaranteed check must be cleared through the bank account before records are generated for the requestor. Should the estimated time and resources to generate the records be different than estimated, either a secondary bill or refund will be made.

Public Records Fee Schedule:

For a Level 3 request, the district will impose charges to reimburse the district for costs associated with producing the records, including, but not limited to, compiling or producing records, costs of materials such as storage devices, hard copier or other costs associated with reproducing the material.

1. Paper copies
The district will provide up to a total of 30 standard, letter size, two-sided document copies of public records for citizens at no cost. Copies beyond 30 sheets will be charged the amount that is in line with the current state printing and distribution price list.
2. Postage
The district will charge postage based on current postal rates.
3. Electronic copies:
There is no additional fee for electronic copies.
4. Other costs:
Copies of recordings, maps and non-standard documents will be charged actual costs.
5. Internal Review Monitor:
Cost of employee(s) time assigned.
6. Legal Counsel Review:
Regular billing rate of the legal firm will apply to requests that require legal review. Any legal costs associated with advising the district on interpretation of this policy or the state open records statutes or guidelines will not be charged to the applicant.

Reduced Fee or Waivers:

The district will accept requests for fee waivers or reductions for records requests. Requests must be in writing and addressed to the executive director. The district will consider and grant reasonable requests to waive and/or reduce fees associated with fulfilling a public records request when doing so is in the public interest because providing access primarily benefits the general public, as defined in ORS 192.324. Media representatives should not assume a waiver will be granted without review of a request. The district will waive the first 15 minutes of staff time needed to fulfill a records request.

The district may deny eligibility for the 15-minute waiver if abuse by the requester is determined to exist either by:

- 1) Fragmenting a request that if taken in the aggregate would amount to significantly more than 15 minutes; or

2) Submitting multiple small requests in a short timeframe causing an undue burden on the agency.

References

ORS Chapter 192

Oregon Dept. of Justice, Oregon Attorney General's Model Contract Rules Manual

BOARD AGENDA COMMUNICATION

AGENDA DATE:	March 18, 2025
SUBJECT:	Fees and Charges Policy
STAFF RESOURCE:	Matt Mercer, Recreation Services Director
PREVIOUS BOARD ACTION:	February 19, 2019 - Approved Fees and Charges Policy
ACTION PROPOSED:	Approve updated Fees and Charges Policy
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 current Fees and Charges Policy was approved by the board on February 19, 2019. The policy was scheduled for review this year as a part of the CAPRA re-accreditation process. Staff thoroughly reviewed the policy and made a number of minor edits to align with current practices and other related policies. Staff also took the opportunity to revise the section addressing needs-based assistance to respond to input received at the annual board workshop on January 31, 2025. A redline copy of the policy is attached (Attachment A) and a clean copy (Attachment B). Following is a summary of the changes that are substantive.

Page 3: Subsidy versus Cost Recovery. The language was clarified so that it is understood that the board approves the overall tax subsidy required to support recreation services during the budget process and not subsidy allocations for specific services.

Page 5 – Costs included in Recreation Program Cost Recovery. Marketing costs have been removed from the cost recovery calculation. This change took place in 2023 and was communicated to the board in the 2023 Annual Board Workshop. The reason for the removal of marketing costs is that district marketing and communication efforts are in the community relations budget and comingled with many broader communication efforts. Additionally, we have not found an accurate way to allocate marketing expenses to specific programs and services.

Page 6 – Cost Recovery Guidelines for Rental Facilities. All the changes proposed are to align the policy with the new Event Rentals in Parks policy approved by the board on July 19, 2022. Cost recovery categories have been changed to reflect the new Rental Events Policy adopted by the board in April 2023. The primary change is that public event rental fees are based on whether an event has open access or limited access rather than the type of organization hosting the event. The partner category was also removed as it is not used.

Page 9 – Needs-Based Assistance – This section has been rewritten to be less prescriptive and procedural and more policy driven. The revised language maintains the same philosophy and continues the practice of the board annually approving a Needs-Based Assistance Plan. The annual plan already addresses the program, priorities and processes more comprehensively than the policy does. This allows the district to respond to changes in need and resources without needing to revise the board policy. The policy also provides that scholarship assistance not exceed 5% of budgeted revenue from regular fees and charges and sets a target of a minimum 25% of scholarship assistance funding coming from non-tax sources. The purpose of this guidance is to provide more predictability in scholarship funding and to ensure the programs sustainability and came from discussions in the January 31 board workshop.

BUDGETARY IMPACT

There are no direct budget impacts of the updated policy except for the proposed guidance on needs-based assistance which provides more predictability and sustainability in the budget for future financial assistance support.

STAFF RECOMMENDATION

Staff recommends that the board approve the updated Fees and Charges Policy.

MOTION

I move to approve the Fees and Charges Policy dated March 18, 2025.

ATTACHMENTS

Attachment A - Fees and Charge Policy (substantive changes redlined)
Attachment B – Fees and Charges Policy (clean version)

USER FEES AND CHARGES

SECTION 1: GENERAL POLICY

1. Purpose

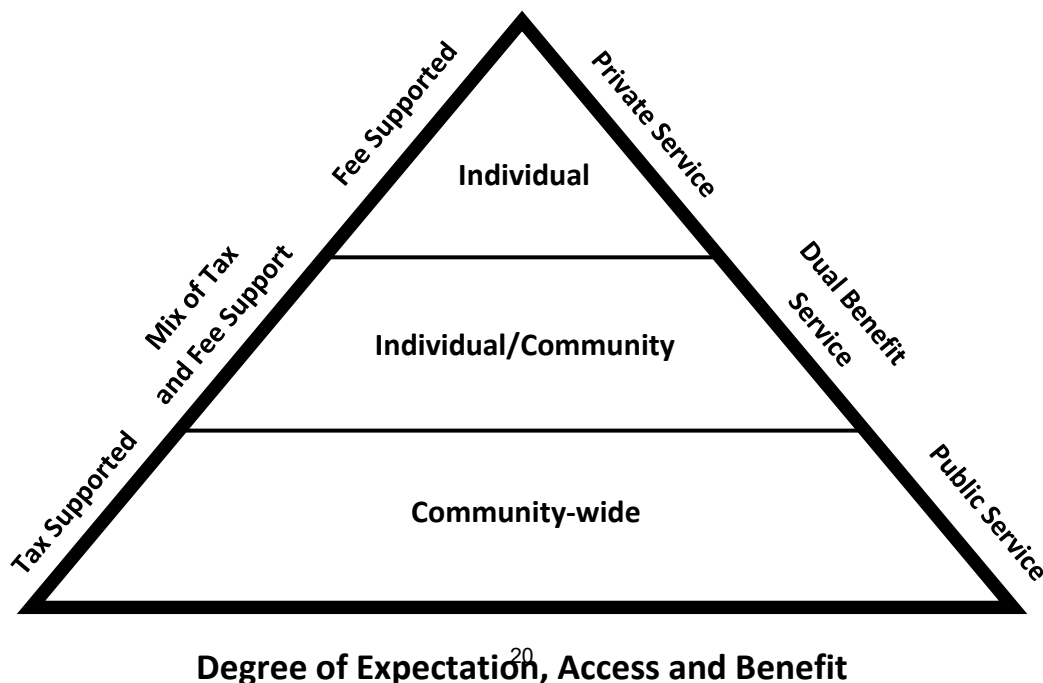
The purpose of the policy is to establish fee-setting philosophy and guidelines that provide direction to staff in setting fees and charges for programs, facilities and other services.

2. Introduction

The Bend Park and Recreation District relies on a mixture of tax revenue and user fees to provide high quality, accessible and diverse park and recreation services to district residents. Tax revenues fund basic services such as parks, trails and natural areas and help support a wide variety of recreation opportunities. Fees and charges are used to offset some or all of the cost of individual participation in a program or use of a facility. Fees and charges shift some of the cost of providing a service to the individuals who benefit directly from it. By charging fees, greater tax support is available to spread over a broader range of services allowing for a more comprehensive and sustainable park and recreation system.

3. Funding Philosophy

The district approach to funding park and recreation services is represented in the funding model shown below. This model illustrates the relationship between the expectation for, access to and benefit from a service and how the service is funded.



4. General Service Categories

- A. **Community-wide:** Public services that are basic expectations, are widely accessible and provide community-wide benefit make up the base of the funding model. These services are usually supported fully or heavily through tax revenues. Examples include: acquiring, developing and maintaining parks, trails and natural areas; completing capital improvement projects; providing essential planning and administrative services; and, facilitating outreach and inclusion so that all may benefit from the system.
- B. **Individual/Community:** Many services provided by the district are not usually considered a basic service but respond to varying levels of community expectations and offer a blend of community and individual access and benefit. These dual benefit services are supported by a mix of user fees and tax revenues proportional to the degree of community expectation and access that the service provides. Examples include: the operation of recreation facilities; most recreation programs; community events; and, facility rentals for non-profit organizations offering community programs.
- C. **Individual:** Services that are not generally expected and/or have limited access and benefit to the community at large are considered private services. These services should not be subsidized through tax revenue and in most cases should generate revenue that help support other services that provide broader community access and benefit. Examples include: concession and merchandise sales; private and/or advanced instruction; and, private and commercial use of facilities.

5. Cost Recovery Methodology

- A. Cost recovery is the method for aligning fee and tax support with the funding philosophy described above. Cost recovery represents the portion of the cost of providing a program or service that is recovered through user fees. Services with broader community expectation, access and benefit therefore should have a lower cost recovery expectation than services that have more limited and individual access and benefit.
- B. Cost recovery expectations for different categories of services are approved and periodically reviewed by the Board of Directors. These cost recovery expectations provide guidance and direction to staff for establishing fees for fee-based services. The cost recovery expectations for service categories are expressed as a range. This is because a variety of factors influence actual cost recovery that cannot always be predicted during the fee setting process including: the number of enrollments; facility utilization levels; market conditions; and, certain costs. By providing a cost recovery range instead of a single target, it is more realistic to ensure that services are consistently falling in the approved cost recovery guidelines.

6. Subsidy ~~versus Cost Recovery~~ Allocation

Subsidy ~~allocation~~ is the actual amount of tax support ~~subsidy that is~~ provided for a service based on the cost recovery expectation. For example, a service that costs \$100,000 to provide and has an 80% cost recovery expectation would require a ~~tax~~ subsidy of \$20,000 whereas another service that has the same cost recovery expectation but costs \$1,000,000 to provide would require a \$200,000 ~~tax~~ subsidy. Because ~~tax~~ subsidy ~~levels~~ requirements can vary greatly even with the same cost recovery expectation, it is important that subsidy ~~allocation~~ is considered alongside cost recovery. [The amount of tax subsidy supporting recreation services is approved annual in district budget process.](#) ~~Subsidy allocations for different services are approved by the Board of Directors annually through the budget process.~~

7. Fee Setting Methods

- A. Fee setting for district programs and services are based primarily on the cost recovery methodology described above. Specifically, this includes:
 - Determining the appropriate category for the program/service
 - Identifying the cost of providing the program/service
 - Applying the approved cost recovery guidelines
- B. Fee setting ~~also~~ takes in account market considerations where applicable including:
 - What people would typically expect or be willing to pay for the service
 - Comparisons with other providers, both public and private, relative to the value of the service
 - Balancing participation goals and affordability with cost recovery expectation
- C. Program fees should at a minimum meet the approved cost recovery guidelines. Program fees and the resulting cost recovery may be higher when market conditions allow, freeing resources for programs and services that require higher levels of tax support.

8. Fee Setting Authority

- A. The Board of Directors approves cost recovery guidelines for different categories of programs and services. These guidelines are included in this policy and shall be reviewed no less than every four (4) years.
- B. Fees are established by staff for specific programs and services based on the board-approved guidelines in this policy. Fees will be evaluated and updated to ensure they continue to meet cost recovery guidelines.
- C. The board delegates to the Executive Director or designee the authority to approve fees that do not meet the cost recovery guidelines.

SECTION II: COST RECOVERY GUIDELINES FOR RECREATION PROGRAMS AND SERVICES

1. **Program Category Descriptions:** District recreation programs and services are separated into the following categories based on the degree of community versus individual access and benefit the program provides and the relative level of expectation and reliance the community has for the program.
 - A. **Issue-Focused Services:** Programs and services designed to address a community issue or need that the district has identified as a priority for use of tax resources. Services such as needs-based assistance, inclusion services, outreach and targeted programming to underserved populations are examples.
 - B. **Core Programs:** Programs that are central to supporting the district’s mission and initiatives and that there is strong expectation that the district provides. It is also unlikely that other providers could meet the community need. Programs in this category have broad interest, access and participation such as public swimming and skating times or serve a strongly identified need such as after school care, swim lessons and youth sport leagues.
 - C. **Complementary Programs:** Programs that complement core services and contribute to fulfilling the district mission but that there is a lower expectation for the district to provide. Similar programs are typically offered by other providers. Programs in this category include activities with more specialized interest and focus and generally lower capacity and participation such as art, enrichment, STEM and facilitated outdoor programs.
 - D. **Specialized Programs:** Programs not expected or necessary to fulfill the mission of the District and typically serve a narrower population or interest. Programs often require a specific skill level and/or have very limited capacity, and are usually offered by private providers as well. Examples include advanced classes and camps, individualized instruction, small group training, etc.
 - E. **Private Benefit Services:** Services that do not directly support the district mission but are desired by some and can produce revenue to help offset the cost of providing public benefit services. Examples include food and beverage sales, merchandise for resale and private rentals of facilities.

2. **Cost Recovery Guidelines:** The following cost recovery guidelines will be used to establish fees for the categories of recreation programs and services described above. [Activities occurring at operated facilities have lower cost recovery expectations because they have to recover a portion of facility operating costs in addition to program costs.](#) ~~include Juniper Swim & Fitness Center, The Pavilion and Larkspur Community Center.~~

Table 1: Cost Recovery Guidelines for Recreation Programs

Program Category	Operated Facility	Non-Operated Facility
Issue-Focused Services	0-50%	0-50%
Core Programs	60-80%	80-100%
Complementary Programs	80-100%	100-120%

Specialized Programs	100-120%	120-140%
Private Benefit Services	120%+	140%+

3. Costs Included in Cost Recovery: The following cost will be considered when applying the cost recovery guidelines to the different categories of recreation programs and services.

Table 2: Costs included in Recreation Program Cost Recovery

Location	Direct Costs	Program Management	Registration	Marketing	Facility Operations	Organizational Support	Capital Costs
Operated Facility	Yes	Yes	Yes	No Yes	Yes	No	No
Non-Operated	Yes	Yes	Yes	No Yes	No	No	No

- **Direct Costs** – costs directly associated with providing the program including staff wages, payroll taxes and benefits, consumable program supplies, etc.
- **Program Management** – costs of planning, coordinating and managing the program including staff wages, payroll taxes and benefits, and indirect costs such as office supplies, phone, staff training, etc.
- **Registration** – costs associated with registration and customer service to support the activity including customer service wages, payroll taxes and benefits, credit card processing fees, printing, etc.
- **Marketing** – costs associated with marketing and communication efforts including the production [of online registration and activity](#) ~~and mailing of the program guide~~ [information](#), website management, advertising and other collateral material.
- **Facility Operations** – direct costs of operating and maintaining facilities including utilities, maintenance, repairs, janitorial, and staffing and materials required to support the ongoing maintenance and operations of a facility.
- **Organizational Support** – services that support the overall operation of the District, including: Human Resources, Finance, IT, Community Relations, Planning and Development, Executive Directors office, etc.
- **Capital Costs** – the initial capital costs to develop the facility, including annual debt service payments or depreciation of these investments and ongoing capital costs required to maintain and improve District facilities and assets.

SECTION III: COST RECOVERY GUIDELINES FOR RENTAL FACILITIES

1. **Rental Definitions:** A facility rental is considered any third party reserved use of a district park, facility or portion thereof. Facility rentals are divided into the following three service categories for cost recovery consideration.

- **PublicCommunity Event Rentals:** Functions that are promoted as community-wide events and open to all who choose to participate.
- **Organized Sport User Groups:** Use of facilities to operate organized sports or other recreation activities for registered participants.
- **PrivateExclusive Event RentalsFunctions:** Rentals intended for exclusive use by invited guests such as weddings, birthday parties, holiday parties, reunions, etc.

2. **Renter Types:** The District recognizes three types of renters in its cost recovery guidelines [for Private Event Rentals and Organized Sport User Groups](#). The renter type is based on the purpose of the rental function rather than the renting entity.

- **Non-profit:** Renter is a non-profit organization conducting activities that directly support the mission and purpose of the non-profit organization.
- **Private:** Renter is a private individual.
- **Commercial:** Renter is engaging in a commercial “for-profit activity” whether a fee is charged directly or not.
- **Public Event Rentals:** [Cost recovery guidelines are based on whether the event has open access \(free and unlimited\) or limited access \(registration or ticket required\) and not on the type of renter described above.](#)

3. **Cost Recovery Guidelines:** The following cost recovery guidelines will be used to establish fees for the various categories and types of facility rentals.

Table 3: Cost Recovery Guidelines for Rental Facilities

Rental Function	Partner	Non-Profit	Private	Commercial
Community Events	0-50%	50-75%	N/A	100-125%
Organized Sport User Groups	0-50%	75-100%	100-125%	125-150%
Private EventExclusive Rentals	0-50%	100-125%	125-150%	150-200%

Rental Function		Open Access	Limited Access	
Public Event Rentals		50-75%	75-100%	

4. **Costs Included in Cost Recovery:** The following cost will be considered when applying the cost recovery guidelines to the different types of facility rentals.

Table 4: Costs included in Rental Facility Cost Recovery

Facility Type	Reservation	Direct Service	Facility Operations	Organizational Support	Capital Improvements	Capital Costs
Parks & Shelters	Yes	Yes	No	No	No	No
Athletic Fields	Yes	Yes	No	No	No	No
Recreation Facilities	Yes	Yes	Yes	No	No	No
Rental Halls	Yes	Yes	Yes	Yes	Yes	No

- **Reservation** – costs associated with reserving and renting the facility, including processing reservations, credit card procession fees, permits, logistical plans, etc.
- **Direct Service** – cost of direct services provided by the District to support the rental activity such as athletic field preparation for specific activity, athletic field lighting, additional trash or restroom service, site and utility modifications, staff logistical support, delivery and/or set-up of equipment, etc.
- **Facility Operations** – direct costs of operating and maintaining a park or facility including utilities, maintenance, janitorial service, general turf maintenance, staffing and materials required to support the ongoing maintenance and operations of a facility, etc.
- **Organizational Support** – services that support the overall operation of the District, including: Human Resources, Finance, IT, Community Relations, Planning and Development, Executive Directors office, etc.
- **Capital Improvements** – capital costs required to maintain and improve District facilities and assets.
- **Capital Costs** – the initial capital cost to develop the facility, including annual debt service payments or depreciation of these investments.

SECTION IV: OUT-OF-DISTRICT USE AND FEES

- 1. Philosophy:** The Bend Park and Recreation District was established to provide park and recreation services to those who reside or own property within district boundaries. District residents and property owners pay taxes to support district operations. The district recognizes visitors and residents from outside of the district's boundaries will also use and enjoy district parks, facilities and programs. In order to limit the financial subsidy of providing services to non-resident users and ensure that non-resident users pay their fair share for services, the district will normally assess additional fees to non-resident users where fees are charged.

- 2. Recreation Programs**
 - A. Most district recreation programs are designed primarily to serve and benefit district residents; however, the district encourages non-resident participation as many would not otherwise have access to these services. Non-resident participation can also contribute to the overall financial viability of programs by filling available spots. In the event that non-resident participation significantly displaces district residents, the District will consider implementing priority registration to district residents through early registration or other means.

 - B. Non-residents will be charged a 20% out-of-district fee in addition to the in-district fee to participate in most recreation programs. The following recreation programs are exempt from out-of-district fees:
 - Drop-in fees at recreation facilities (due to the difficulty in verifying district residency)
 - Programs offered in partnership with Bend-La Pine Schools (for students who reside outside the Bend Park and Recreation District, but within the Bend-La Pine School District boundaries)
 - Private-benefit and specialized services that exist to generate revenue and do not require tax support (i.e. concession and merchandise sales, personal instruction, specialized training, etc.)
 - Exceptions as granted by the Executive Director

- 3. Facility Rentals**
 - A. District facilities are developed and operated primarily to benefit district residents. Many of these facilities are made available for rent by private parties or organizations. The district will prioritize residents when feasible; however, many facilities are scheduled on a first come, first serve basis so resident priority is not possible.

 - B. Non-residents will be charged a 20% out-of-district fee in addition to the in-district fee to rent facilities. The following rentals are exempt from out-of-district fees.
 - Governmental agencies or non-profit organizations serving district residents
 - Exceptions as granted by the Executive Director

SECTION V: NEEDS-BASED ASSISTANCE

- 1. Philosophy:** The district believes that everyone should have the opportunity to benefit from recreation activities. Many recreation options are available to the public without charge, including: parks, trails, playgrounds, outdoor basketball courts, sand volleyball courts, skate parks, bike parks, tennis and pickleball courts, etc. Most organized recreation programs and indoor recreation facilities, however, require fees to participate. The district recognizes that these fees can present a barrier for lower income residents. To reduce this barrier, the district will provide needs-based financial assistance to facilitate access to most fee-based recreation programs and facilities. The district will also offer some free and low-cost activities to provide additional opportunities for residents of all income levels to participate.

- 2. Annual Needs-Based Assistance Plan:** The board will approve an annual Needs-Based Assistance Plan prior to the budget process. The plan will include eligibility guidelines, assistance levels and budget requirements and resources for providing financial assistance to recreation program participants for the upcoming fiscal year. Most of the financial assistance will be provided in the form of recreation scholarships that offer reduced fees based on household income levels. The plan may also include free or highly subsidized programs that specifically serve eligible low-income residents. Funding for the approved plan will be included in the proposed budget each year.

- 3. Financial Guidelines:** In order to maintain financial sustainability of the scholarship program and the district as a whole, the amount of scholarship assistance budgeted each year will not exceed 5% of the budgeted revenue from regular recreation fees and charges unless otherwise directed and approved by the board. The district will also strive to secure alternative resources to fund a minimum of 25% of the scholarship requirements. Alternative funding resources may include sponsorships, donations and grants as well as dedicated non-tax supported revenues such cell tower leases and concession profits. In the event that assistance levels are projected to exceed the approved budget by more than 5%, district staff may modify the Needs- Based Assistance Plan to remain within budget or seek board-approval for exceeding spending levels

~~**1. Philosophy:** The District believes that everyone should have the opportunity to benefit from recreation activities. The District provides this opportunity by offering a diverse array of recreation options, from parks and trails to recreation facilities and programs. Many recreation options are available to the public without charge, including: parks, trails, playgrounds, outdoor basketball courts, skate parks, tennis and pickleball courts, etc. Most organized recreation programs and indoor recreation facilities require a fee to participate. The District recognizes that these fees can present a barrier for some. As a result, the District provides assistance to facilitate access to fee-based recreation programs and facilities for those who are unable to pay the regular fee. While the District would like to make all programs available to district residents regardless of ability to pay,~~

services must be prioritized to ensure that the highest and most critical needs are met with available resources.

2. ~~Types of Needs Based Assistance:~~ Financial assistance is provided by the District through two primary methods:

A. ~~Recreation Scholarship Program~~ uses resources from a specifically budgeted line item to fund a portion of the regular participation fees. The Recreation Scholarship Program is supported through revenue received from cell phone tower leases, Bend Park and Recreation Foundation donations, and General Fund tax resources.

B. ~~Free or Low Fee Programs~~ includes programs that are offered free to the entire community and/or subsidized services that target low income families and individuals.

3. ~~Eligibility For Needs Based Assistance:~~

A. Eligibility will be based on Federal Poverty Guidelines for household income and family size. The District will have a two-tiered system: high need and moderate need. To the degree possible, the qualifying income levels will be coordinated with other assistance programs including school Free and Reduced Lunch Program, SNAP, TANF and Oregon Health Plan,

B. The District will work with the Family Action Network and other local agencies to identify and address extreme cases where assistance programs are not adequate to facilitate participation.

4. ~~Funding Priorities:~~ In order to ensure the most critical needs and services are funded, the following priorities have been established:

A. Priority will be given to the following **populations** in order:

1. Individuals with disabilities, including those on long-term disability.
2. Youth 18 years and younger.
3. Adults 19 years and older with qualifying health considerations.
4. General senior population (65 years or older).
5. General adult population (19-64 years).

B. Priority will be given to the following **programs/services** in order:

1. Issue-focused programs.
2. Core recreation programs.
3. Complementary recreation programs.
4. Needs-based assistance will not be offered for specialized programs, private services, rentals or the out-of-district portion of fees.

5. ~~Needs Based Assistance Plan and Funding:~~

A. An annual Needs Based Assistance Plan including recommendations regarding service levels and funding requirements will be approved by the District Board of Directors.

- ~~B. The funding required for the Needs-Based Assistance Plan will be approved through the budget process each year.~~
- ~~C. The following strategies will be considered if the approved funding is not adequate to meet the demand for needs-based assistance.~~
 - ~~1. Suspend funding to lower priority populations.~~
 - ~~2. Suspend funding of complementary recreation programs.~~
 - ~~3. Reduce the percentage of fee covered by needs-based assistance programs.~~
 - ~~4. Implement limits on the amount of funding received per individual/household.~~



USER FEES AND CHARGES

SECTION 1: GENERAL POLICY

1. Purpose

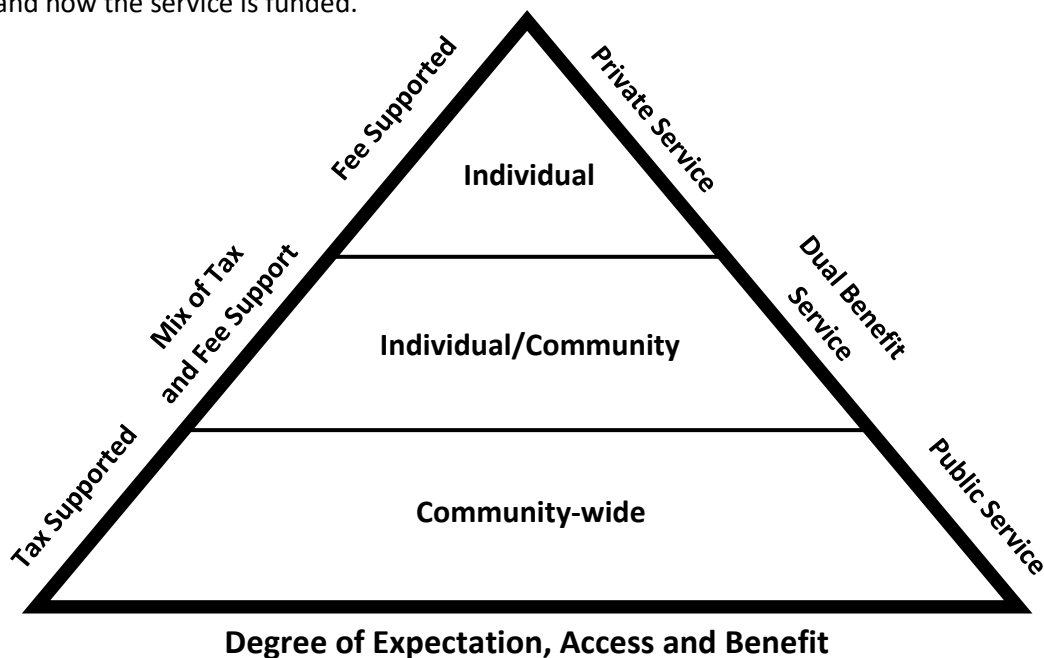
The purpose of the policy is to establish fee-setting philosophy and guidelines that provide direction to staff in setting fees and charges for programs, facilities and other services.

2. Introduction

The Bend Park and Recreation District relies on a mixture of tax revenue and user fees to provide high-quality, accessible and diverse park and recreation services to district residents. Tax revenues fund basic services such as parks, trails and natural areas and help support a wide variety of recreation opportunities. Fees and charges are used to offset some or all of the cost of individual participation in a program or use of a facility. Fees and charges shift some of the cost of providing a service to the individuals who benefit directly from it. By charging fees, greater tax support is available to spread over a broader range of services, allowing for a more comprehensive and sustainable park and recreation system.

3. Funding Philosophy

The district approach to funding park and recreation services is represented in the funding model shown below. This model illustrates the relationship between the expectation for, access to and benefit from a service and how the service is funded.



4. General Service Categories

- A. **Community-wide:** Public services that are basic expectations, are widely accessible and provide community-wide benefit make up the base of the funding model. These services are usually supported fully or heavily through tax revenues. Examples include acquiring, developing and maintaining parks, trails and natural areas; completing capital improvement projects; providing essential planning and administrative services; and facilitating outreach and inclusion so that all may benefit from the system.
- B. **Individual/Community:** Many services provided by the district are not usually considered a basic service but respond to varying levels of community expectations and offer a blend of community and individual access and benefit. These dual-benefit services are supported by a mix of user fees and tax revenues proportional to the degree of community expectation and access that the service provides. Examples include the operation of recreation facilities; most recreation programs; community events; and facility rentals for non-profit organizations offering community programs.
- C. **Individual:** Services that are not generally expected and/or have limited access and benefit to the community at large are considered private services. These services should not be subsidized through tax revenue, and in most cases, should generate revenue that helps support other services that provide broader community access and benefit. Examples include concession and merchandise sales; private and/or advanced instruction; and private and commercial use of facilities.

5. Cost Recovery Methodology

- A. Cost recovery is the method for aligning fee and tax support with the funding philosophy described above. Cost recovery represents the portion of the cost of providing a program or service that is recovered through user fees. Services with broader community expectation, access and benefit, therefore, should have a lower cost recovery expectation than services that have more limited and individual access and benefit.
- B. Cost recovery expectations for different categories of services are approved and periodically reviewed by the Board of Directors. These cost recovery expectations provide guidance and direction to staff for establishing fees for fee-based services. The cost recovery expectations for service categories are expressed as a range. This is because a variety of factors influence the actual cost recovery that cannot always be predicted during the fee-setting process including: the number of enrollments; facility utilization levels; market conditions; and certain costs. By providing a cost recovery range instead of a single target, it is more realistic to ensure that services are consistently falling in the approved cost recovery guidelines.

6. Subsidy versus Cost Recovery

Subsidy is the actual amount of tax support provided for a service based on the cost recovery expectation. For example, a service that costs \$100,000 to provide and has an 80% cost recovery expectation would require a subsidy of \$20,000, whereas another service that has the same cost recovery expectation but costs \$1,000,000 to provide would require a \$200,000 subsidy. Because subsidy levels can vary greatly even with the same cost recovery expectation, it is important that subsidy is considered alongside cost recovery. The amount of tax subsidy supporting recreation services is approved annually in the district budget process.

7. Fee Setting Methods

- A. Fee setting for district programs and services are based primarily on the cost recovery methodology described above. Specifically, this includes:
 - Determining the appropriate category for the program/service
 - Identifying the cost of providing the program/service
 - Applying the approved cost recovery guidelines
- B. Fee setting also takes into account market considerations where applicable, including:
 - What people would typically expect or be willing to pay for the service
 - Comparisons with other providers, both public and private, relative to the value of the service
 - Balancing participation goals and affordability with cost recovery expectation
- C. Program fees should, at a minimum, meet the approved cost recovery guidelines. Program fees and the resulting cost recovery may be higher when market conditions allow, freeing resources for programs and services that require higher levels of tax support.

8. Fee Setting Authority

- A. The Board of Directors approves cost recovery guidelines for different categories of programs and services. These guidelines are included in this policy and shall be reviewed no less than every four (4) years.
- B. Fees are established by staff for specific programs and services based on the board-approved guidelines in this policy. Fees will be evaluated and updated to ensure they continue to meet cost recovery guidelines.
- C. The board delegates to the Executive Director or designee the authority to approve fees that do not meet the cost recovery guidelines.

SECTION II: COST RECOVERY GUIDELINES FOR RECREATION PROGRAMS AND SERVICES

1. **Program Category Descriptions:** District recreation programs and services are separated into the following categories based on the degree of community versus individual access and benefit the program provides and the relative level of expectation and reliance the community has for the program.
 - A. **Issue-Focused Services:** Programs and services designed to address a community issue or need that the district has identified as a priority for use of tax resources. Services such as needs-based assistance, inclusion services, outreach, and targeted programming for underserved populations are examples.
 - B. **Core Programs:** Programs that are central to supporting the district’s mission and initiatives and that there is strong expectation that the district provides them. It is also unlikely that other providers could meet the community need. Programs in this category have broad interest, access and participation, such as public swimming and skating times, or serve a strongly identified need, such as after school care, swim lessons and youth sports leagues.
 - C. **Complementary Programs:** Programs that complement core services and contribute to fulfilling the district mission but there is a lower expectation for the district to provide. Similar programs are typically offered by other providers. Programs in this category include activities with more specialized interest and focus and generally lower capacity and participation, such as art, enrichment, STEM and facilitated outdoor programs.
 - D. **Specialized Programs:** Programs not expected or necessary to fulfill the mission of the district and typically serve a narrower population or interest. Programs often require a specific skill level and/or have very limited capacity and are usually offered by private providers as well. Examples include advanced classes and camps, individualized instruction, small group training, etc.
 - E. **Private Benefit Services:** Services that do not directly support the district mission but are desired by some and can produce revenue to help offset the cost of providing public benefit services. Examples include food and beverage sales, merchandise for resale and private rentals of facilities.

Cost Recovery Guidelines: The following cost recovery guidelines will be used to establish fees for the categories of recreation programs and services described above. Activities occurring at operated facilities have lower cost recovery expectations because they have to recover a portion of facility operating costs in addition to program costs.

Table 1: Cost Recovery Guidelines for Recreation Programs

Program Category	Operated Facility	Non-Operated Facility
Issue-Focused Services	0-50%	0-50%
Core Programs	60-80%	80-100%
Complementary Programs	80-100%	100-120%
Specialized Programs	100-120%	120-140%
Private Benefit Services	120%+	140%+

2. **Costs Included in Cost Recovery:** The following costs will be considered when applying the cost recovery guidelines to the different categories of recreation programs and services.

Table 2: Costs included in Recreation Program Cost Recovery

Location	Direct Costs	Program Management	Registration	Marketing	Facility Operations	Organizational Support	Capital Costs
Operated Facility	Yes	Yes	Yes	No	Yes	No	No
Non-Operated	Yes	Yes	Yes	No	No	No	No

- **Direct Costs** – costs directly associated with providing the program, including staff wages, payroll taxes and benefits, consumable program supplies, etc.
- **Program Management** – costs of planning, coordinating and managing the program, including staff wages, payroll taxes and benefits, and indirect costs such as office supplies, phone, staff training, etc.
- **Registration** – costs associated with registration and customer service to support the activity, including customer service wages, payroll taxes and benefits, credit card processing fees, printing, etc.
- **Marketing** – costs associated with marketing and communication efforts, including the production of online registration and activity information, website management, advertising and other collateral material.
- **Facility Operations** – direct costs of operating and maintaining facilities, including utilities, maintenance, repairs, janitorial, and staffing and materials required to support the ongoing maintenance and operations of a facility.
- **Organizational Support** – services that support the overall operation of the district, including Human Resources, Finance, IT, Community Relations, Planning and Development, Executive Director’s office, etc.
- **Capital Costs** – the initial capital costs to develop the facility, including annual debt service payments or depreciation of these investments and ongoing capital costs required to maintain and improve district facilities and assets.

SECTION III: COST RECOVERY GUIDELINES FOR RENTAL FACILITIES

1. **Rental Definitions:** A facility rental is considered any third-party reserved use of a district park, facility or portion thereof. Facility rentals are divided into the following three service categories for cost recovery consideration.
 - **Public Event Rentals:** Functions that are promoted as community-wide events and open to all who choose to participate.
 - **Organized Sports User Groups:** Use of facilities to operate organized sports or other recreation activities for registered participants.
 - **Private Event Rentals:** Rentals intended for exclusive use by invited guests, such as weddings, birthday parties, holiday parties, reunions, etc.

2. **Renter Types:** The district recognizes three types of renters in its cost recovery guidelines for Private Event Rentals and Organized Sports User Groups. The renter type is based on the purpose of the rental function rather than the renting entity.
 - **Non-profit:** Renter is a non-profit organization conducting activities that directly support the mission and purpose of the non-profit organization.
 - **Private:** Renter is a private individual.
 - **Commercial:** Renter is engaging in a commercial “for-profit activity” whether a fee is charged directly or not.
 - **Public Event Rentals:** Cost recovery guidelines are based on whether the event has open access (free and unlimited) or limited access (registration or ticket required) and not on the type of renter described above.

3. **Cost Recovery Guidelines:** The following cost recovery guidelines will be used to establish fees for the various categories and types of facility rentals.

Table 3: Cost Recovery Guidelines for Rental Facilities

Rental Function	Non-Profit	Private	Commercial
Organized Sports User Groups	75-100%	100-125%	125-150%
Private Event Rentals	100-125%	125-150%	150-200%

Rental Function	Open Access	Limited Access
Public Event Rentals	50-75%	75-100%

4. **Costs Included in Cost Recovery:** The following costs will be considered when applying the cost recovery guidelines to the different types of facility rentals.

Table 4: Costs included in Rental Facility Cost Recovery

Facility Type	Reservation	Direct Service	Facility Operations	Organizational Support	Capital Improvements	Capital Costs
Parks & Shelters	Yes	Yes	No	No	No	No
Athletic Fields	Yes	Yes	No	No	No	No
Recreation Facilities	Yes	Yes	Yes	No	No	No
Rental Halls	Yes	Yes	Yes	Yes	Yes	No

- **Reservation** – costs associated with reserving and renting the facility, including processing reservations, credit card processing fees, permits, logistical plans, etc.
- **Direct Service** – cost of direct services provided by the district to support the rental activity, such as athletic field preparation for a specific activity, athletic field lighting, additional trash or restroom service, site and utility modifications, staff logistical support, delivery and/or set-up of equipment, etc.
- **Facility Operations** – direct costs of operating and maintaining a park or facility including utilities, maintenance, janitorial service, general turf maintenance, staffing and materials required to support the ongoing maintenance and operations of a facility, etc.
- **Organizational Support** – services that support the overall operation of the district, including Human Resources, Finance, IT, Community Relations, Planning and Development, Executive Director’s office, etc.
- **Capital Improvements** – capital costs required to maintain and improve district facilities and assets.
- **Capital Costs** – the initial capital cost to develop the facility, including annual debt service payments or depreciation of these investments.

SECTION IV: OUT-OF-DISTRICT USE AND FEES

- 1. Philosophy:** The Bend Park and Recreation District was established to provide park and recreation services to those who reside or own property within district boundaries. District residents and property owners pay taxes to support district operations. The district recognizes that visitors and residents from outside the district's boundaries will also use and enjoy district parks, facilities and programs. In order to limit the financial subsidy of providing services to non-resident users and ensure that non-resident users pay their fair share for services, the district will normally assess additional fees to non-resident users where fees are charged.

- 2. Recreation Programs**
 - A. Most district recreation programs are designed primarily to serve and benefit district residents; however, the district encourages non-resident participation as many would not otherwise have access to these services. Non-resident participation can also contribute to the overall financial viability of programs by filling available spots. In the event that non-resident participation significantly displaces district residents, the district will consider implementing priority registration for district residents through early registration or other means.

 - B. Non-residents will be charged a 20% out-of-district fee in addition to the in-district fee to participate in most recreation programs. The following recreation programs are exempt from out-of-district fees:
 - Drop-in fees at recreation facilities (due to the difficulty in verifying district residency)
 - Programs offered in partnership with Bend-La Pine Schools (for students who reside outside the Bend Park and Recreation District, but within the Bend-La Pine School District boundaries)
 - Private-benefit and specialized services that exist to generate revenue and do not require tax support (i.e., concession and merchandise sales, personal instruction, specialized training, etc.)
 - Exceptions as granted by the Executive Director

- 3. Facility Rentals**
 - A. District facilities are developed and operated primarily to benefit district residents. Many of these facilities are made available for rent by private parties or organizations. The district will prioritize residents when feasible; however, many facilities are scheduled on a first-come, first-served basis, so resident priority is not possible.

 - B. Non-residents will be charged a 20% out-of-district fee in addition to the in-district fee to rent facilities. The following rentals are exempt from out-of-district fees.
 - Governmental agencies or non-profit organizations serving district residents
 - Exceptions as granted by the Executive Director

SECTION V: NEEDS-BASED ASSISTANCE

- 1. Philosophy:** The district believes that everyone should have the opportunity to benefit from recreation activities. Many recreation options are available to the public without charge, including parks, trails, playgrounds, outdoor basketball courts, sand volleyball courts, skate parks, bike parks, tennis and pickleball courts, etc. However, most organized recreation programs and indoor recreation facilities require participation fees. The district recognizes that these fees can present a barrier for lower-income residents. To reduce this barrier, the district will provide needs-based financial assistance to facilitate access to most fee-based recreation programs and facilities. The district will also offer some free and low-cost activities to provide additional opportunities for residents of all income levels to participate.
- 2. Annual Needs-Based Assistance Plan:** The board will approve an annual Needs-Based Assistance Plan prior to the budget process. The plan will include eligibility guidelines, assistance levels and budget requirements and resources for providing financial assistance to recreation program participants for the upcoming fiscal year. Most of the financial assistance will be provided in the form of recreation scholarships that offer reduced fees based on household income levels. The plan may also include free or highly subsidized programs that specifically serve eligible low-income residents. Funding for the approved plan will be included in the proposed budget each year.
- 3. Financial Guidelines:** In order to maintain financial sustainability of the scholarship program and the district as a whole, the amount of scholarship assistance budgeted each year will not exceed 5% of the budgeted revenue from regular recreation fees and charges unless otherwise directed and approved by the board. The district will also strive to secure alternative resources to fund a minimum of 25% of the scholarship requirements. Alternative funding resources may include sponsorships, donations and grants as well as dedicated non-tax supported revenues such as cell tower leases and concession profits. In the event that assistance levels are projected to exceed the approved budget by more than 5%, district staff may modify the Needs-Based Assistance Plan to remain within budget or seek board approval for exceeding spending levels.



Board of Directors Meeting Summary

March 4, 2025

District Office Building | 799 SW Columbia | Bend, Oregon



BOARD PRESENT

- Donna Owens
- Jodie Barram
- Cary Schneider
- Deb Schoen
- Nathan Hovekamp

The BPRD board of directors met on March 4, and approved a purchase and sale agreement for a future neighborhood park site and a contract amendment for the future home of the Park Services division. A [video recording](#) is available on the website.

Property purchased

Working with a consultant, EPIC Land Solutions, the district has negotiated the purchase of approximately three acres of land located between Pinebrook Boulevard and Murphy Road in southwest Bend.

The property is owned by the Pinebrook Homeowners Association. The property is approximately 5.38 acres in size and extends into the Pinebrook neighborhood. To purchase approximately three acres that are desired by the district, a partition will be required to split the property into two parcels. The HOA will retain ownership of the remainder of the property.

This acquisition is part of the district's efforts to acquire property for new parks in accordance with the comprehensive plan policy recommendation to focus on providing access to parks within ½ mile of most homes.

Director Hovekamp made a motion to: (1) authorize the executive director to finalize and execute a Purchase and Sale Agreement with the Pinebrook Homeowners Association for the acquisition of land for a neighborhood park for an amount not to exceed \$262,479.94, plus all related closing, legal and due diligence costs and otherwise on the terms and conditions of the PSA. And (2) authorize the executive director to execute and deliver such instruments and closing documents necessary to complete the transactions contemplated by the PSA. Director Schoen seconded. The motion was approved unanimously, 5-0. (Hovekamp, Schneider, Schoen, Owens and Barram)

Boyd Acres Park Services Complex

The existing Park Services facilities were built in the 1980s on a sloped site and sized to accommodate support services of the district at that time. The facility is now inadequate to meet today's needs for space, safety and efficient operations.

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 Rd. The complex is located on 5.08 acres and is comprised of four buildings that house office, shop and warehouse space.

Staff recommend and the board approved Amendment #1, the Boyd Acres Park Services Complex Professional Design Services contract with Stemach Design + Architecture, with a cost not to exceed \$403,300. Staff further

recommend the board approve a 10% design contingency of \$40,330 for a total design budget not to exceed \$443,630.

The PSA allows the city to occupy the facility until their new facility is completed. However, planning and design for tenant improvements are timed accordingly with the anticipated vacancy of the city at the end of 2025, so that work is ready to commence at their departure.

Director Schneider made a motion to authorize the executive director to negotiate and execute Amendment #1 to the professional services agreement for the Boyd Acres Park Services Complex Professional Design Services contract with Stemach Design + Architecture with a cost not to exceed \$403,300, and to approve a 10% design contingency of \$40,330 for a total phase one design budget not to exceed \$443,630. Director Owens seconded. The motion was approved unanimously, 5-0. (Hovekamp, Schneider, Schoen, Owens and Barram)

Juniper 50-meter pool cover update

Staff provided the board with an update on the status of the Juniper Swim & Fitness Center 50-meter pool cover. District staff have been researching alternative options for meeting the desire to have a year-round pool that can be transformed into an open-air, outdoor pool environment during the summer months.

At the Jan. 7, 2025, board meeting, staff shared that the existing structure is reaching the end of its lifespan and can no longer function as designed, including the removal of the roof panels for the summer months.

Staff considered user input in a recent survey, initial capital costs, ongoing operational expenses, environmental factors, flexibility of use and building aesthetics when evaluating options. Staff shared a summary of the options considered and a recommendation during the work session. While formal board action is not required at this time, staff asked for board direction on moving forward to the next stage of planning with the recommended structure.

The board provided direction to pursue the recommended retractable structure. As a next step, staff will prepare and issue an request for proposals for a design/build contract this spring with the goal of having a firm selected and under contract this summer.

The earliest that construction would begin is September 2026. If construction cannot begin in September 2026, the project would likely be delayed until September 2027 as a September start has the least impact on pool users while providing a reasonable weather window for the bulk of construction to occur.

System development charges (SDC) ordinance update

As part of mid-term comprehensive plan update, the district is updating its system development charges (SDC) project list, fees and ordinance. As part of this project, the existing ordinance, adopted in 2019, is being reviewed for housekeeping and other necessary legal clarifications or changes.

Staff and the district's legal counsel are:

- Adding language that gives the district the ability to interpret the best category for residential uses not otherwise clearly defined.
- Updating language to clarify that multiple units on a shared lot, regardless of if they share a wall, will be calculated at the multi-unit rate.
- Defining homelessness, domestic violence and other emergency-type shelters to help administer waivers or exemptions more clearly.
- Clarify uses that are considered overnight visitor accommodations.

Staff also requested the board's feedback on SDC deferrals. Currently, the district allows multi-unit projects to defer the payment of SDCs to occupancy, but the SDCs are then calculated at the rate in effect at the time of payment. Recent changes to the city's SDC program allow all residential projects to defer SDCs until occupancy, but the SDC is charged at the rate in effect at the time of permit application. The updated draft ordinance will be considered at two upcoming meetings this spring.

Strategic plan actions

The 2024-2029 Strategic Plan was adopted by the district's board of directors in October 2024. Since the plan's adoption, district staff have been working to develop actions for the current fiscal year for each of the plan's 20 strategies. During work session, staff shared updates on actions underway, completed or slated for completion before the fiscal year ends on June 30, 2025.

The next board meeting is March 18.

**Board Calendar
2025**

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

APRIL 1

EMPLOYEE RECOGNITION

Adam Kau, Customer Service Supervisor

- Chris King
- Mary Brooks

WORK SESSION

- Recreation Programming Plan Board Input – *Matt Mercer (30 min)*

CONSENT AGENDA

- Employee Health Insurance Contract

BUSINESS SESSION

- Public Hearing and Approve Findings and Resolution for Alternative Contracting Method for JSFC Pool Cover – *Brian Hudspeth (15 min)*
- Caldera Ranch Annexation – *Henry Stroud (15 min)*
- Public Hearing and First Reading of SDC Ordinance- *Kristin Toney (15 min)*
- Bend Elks Lease Extension – *Kristin Toney (10 min)*
- Needs Based Assistance Report for FY 24-25 and Approve Plan for FY 25-26 – *Matt Mercer (40 min)*

APRIL 15 – Canceled

APRIL 18

BUDGET TOUR 9:00-3:30

MAY 6

WORK SESSION

- City of Bend Site Specific TIF Program Update – *Rachel Colton and Jonathan Taylor (30 min)*
- Old Bend Gym Repair and Building Report – *Bronwen Mastro (30 min)*
- Draft Recreation Programming Plan Review – *Matt Mercer (30 min)*

CONSENT

- Approve Fuel Card Contract

BUSINESS SESSION

- First Reading Park Rules and Regulation Ordinance – *Julie Brown (20 min)*
- Approve Natural Area Property Purchase and Sale Agreement – *Quinn Keever (20 min)*
- Approve Athletic Field and Sports Program Guidelines – *Becky Rexford (20 min)*
- Second Reading of SDC Ordinance – *Kristin Toney (10 min)*

REPORTS

- 3rd Quarter Admin Report
- Recreation Report – Winter Season

MAY 13 & 15 4:00 PM (May 15 tentative)

BUDGET COMMITTEE MEETINGS

MAY 20

WORK SESSION

CONSENT

- Approve Recreation Programming Plan

BUSINESS SESSION

- Resolution No. XX - Update SDC project list – *Kristin Toney and Deb Galardi (15 min)*
- Resolution No. XX – Methodology *Kristin Toney and Deb Galardi (15 min)*
- Resolution No. XX - SDC Annual Index – *Kristin Toney (15 min)*
- Second Reading Park Rules and Regulation Ordinance – *Julie Brown (10 min)*

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)*