



CITY OF BEND

# **CEDD Scenario Analysis & Action Plan**

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# Permit Activity Analysis

# Activity Levels YTD Align Closely to 2023

Top 10 Planning Fees Periods 1-12	FY			2025 YTD	FY25 Run-Rate
	2022	2023	2024		
Planning - Site Plan New Development (sq ft)	\$1,307,755	\$927,899	\$1,233,842	\$195,447	\$586,341
Planning Review - New Dwelling Unit Review	\$308,760	\$313,740	\$397,504	\$158,513	\$475,538
Planning - Subdivision Phased	\$168,743	\$214,509	\$148,132	\$77,812	\$233,436
Planning - Subdivision 1 Phase	\$236,501	\$91,755	\$127,733	\$74,462	\$223,387
Planning Review - New Comm, Ind, Inst, Multi-Family or Add	\$94,211	\$182,287	\$126,033	\$54,452	\$163,357
Planning - Partition	\$61,269	\$59,736	\$85,879	\$24,525	\$73,574
Planning - Short Term Rental, Type II	\$301,119	\$176,340	\$42,561	\$20,614	\$61,841
Planning - Site Plan - Major Alteration (sq ft)	\$103,413	\$104,016	\$197,648	\$20,378	\$61,134
Planning Review - New Single Family or Duplex Review	\$183,930	\$1,296	\$0	\$0	\$0
Planning - Master Development Plan or Special Planned District (per acre)	\$156,052	\$217,534	\$78,948	\$0	\$0
<b>Grand Total</b>	<b>\$2,921,753</b>	<b>\$2,289,113</b>	<b>\$2,438,278</b>	<b>\$626,203</b>	<b>\$1,878,608</b>
<b>YE Cumulative Revenues (FY25 is Forecasted Value)</b>	<b>\$3,963,845</b>	<b>\$3,220,063</b>	<b>\$3,557,391</b>		<b>\$3,267,027</b>
<b>Top 10 Fees % of Total Revenue</b>	<b>74%</b>	<b>71%</b>	<b>69%</b>		<b>58%</b>
*No Master Plans in FY25 so far - expecting 1 to come (not currently modeled)					
**Notable New Fee Activity - Middle Housing Land Division, Minor Tenant Improvement, New Dwelling Unit - 1st Lot in Subdivision Surcharge					

# Activity Levels YTD Align Closely to 2023

Top 10 Planning Fees Periods 1-4	FY			
	2022	2023	2024	2025
Planning - Site Plan New Development (sq ft)	\$463,128	\$180,862	\$600,127	\$195,447
Planning Review - New Dwelling Unit Review	\$0	\$135,456	\$134,360	\$158,513
Planning - Subdivision Phased	\$15,516	\$73,452	\$14,580	\$77,812
Planning - Subdivision 1 Phase	\$20,253	\$44,172	\$0	\$74,462
Planning Review - New Comm, Ind, Inst, Multi-Family or Add	\$31,598	\$25,990	\$31,400	\$54,452
Modification of Approval (prior to plat recording or occupancy))	\$21,893	\$302	\$19,404	\$42,880
Planning - Partition	\$24,368	\$22,708	\$38,192	\$24,525
Planning - Short Term Rental, Type II	\$122,200	\$124,704	\$22,315	\$20,614
Planning - Site Plan - Major Alteration (sq ft)	\$57,786	\$62,892	\$56,606	\$20,378
Planning Review - New Single Family or Duplex Review	\$174,356	\$1,324	\$0	\$0
<b>Grand Total</b>	<b>\$931,097</b>	<b>\$671,862</b>	<b>\$916,985</b>	<b>\$669,083</b>
<b>YE Cumulative Revenues (FY25 is Forecasted Value)</b>	<b>\$3,963,845</b>	<b>\$3,220,063</b>	<b>\$3,557,391</b>	<b>\$3,267,027</b>
*Note - Grand Total Representative of Top 10 Fees, not overall YTD Revenue				
**Notable New Fee Activity - Middle Housing Land Division, Minor Tenant Improvement, New Dwelling Unit - 1st Lot in Subdivision Surcharge				

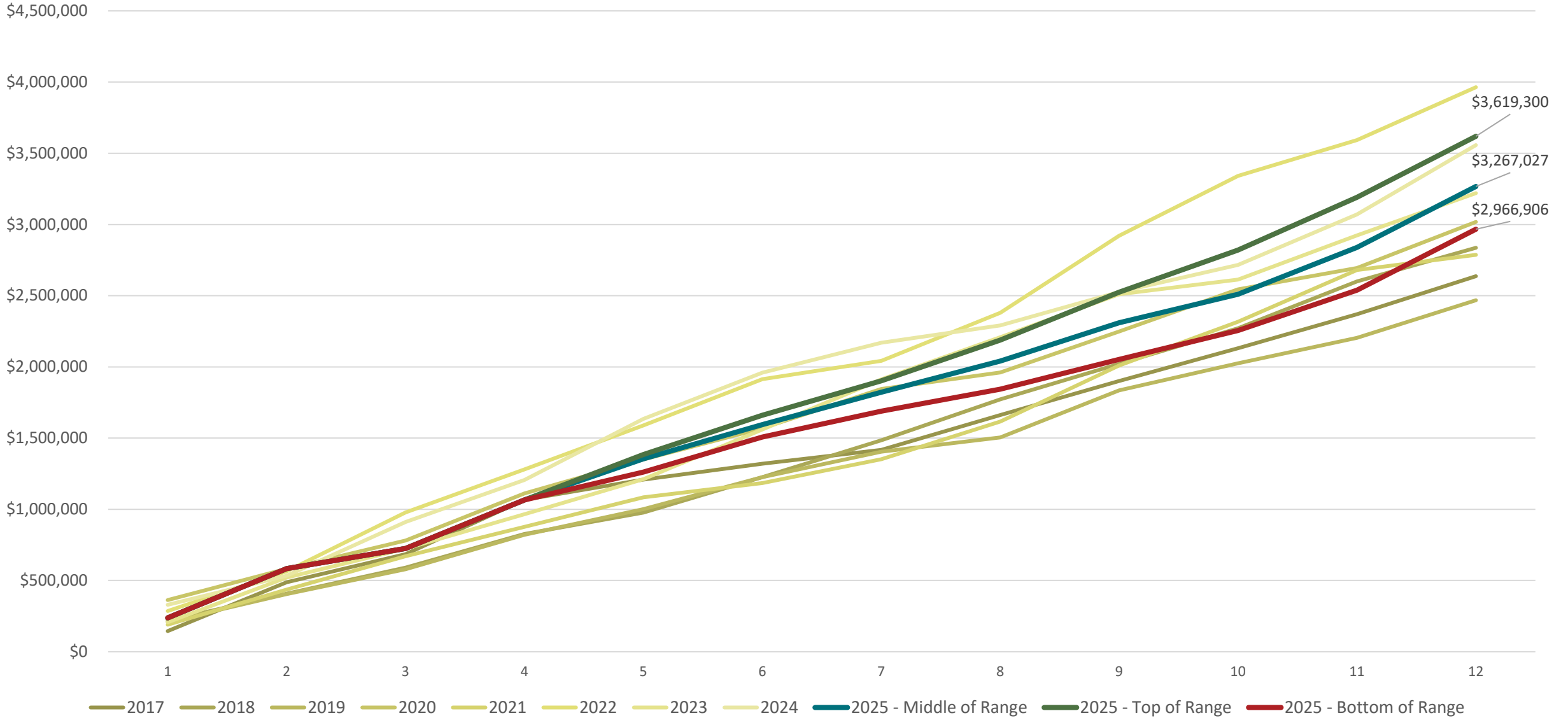
# Activity Levels YTD Align Closely to 2023

Top 10 Permits by Count Periods 1-4	FY			
	2022	2023	2024	2025
Planning Review - New Dwelling Unit Review		288	250	249
Addressing - New Address	99	102	87	108
Planning Review - Minor Res. Remodel, Addition, Alteration (interior)	61	77	78	70
Planning Review - Re-review - for significant review on 3rd rev or final	13	34	45	58
Planning Review - Minor Tenant Improvement	19	21	26	34
Planning Review - Residential Addition or Alteration	59	43	16	33
Sign - Illuminated Signs	23	31	28	25
Planning - Short Term Rental, Type I	22	36	26	9
Planning - Short Term Rental, Type II	95	77	15	7
Planning Review - New Single Family or Duplex Review	369	36		1
<b>Grand Total of Top 10 Permits</b>	<b>760</b>	<b>745</b>	<b>571</b>	<b>586</b>
<b>Grand Total of All Permits</b>	<b>1073</b>	<b>1055</b>	<b>872</b>	<b>957</b>
<b>Top 10 Permits % of Total Permits</b>	<b>71%</b>	<b>71%</b>	<b>65%</b>	<b>61%</b>

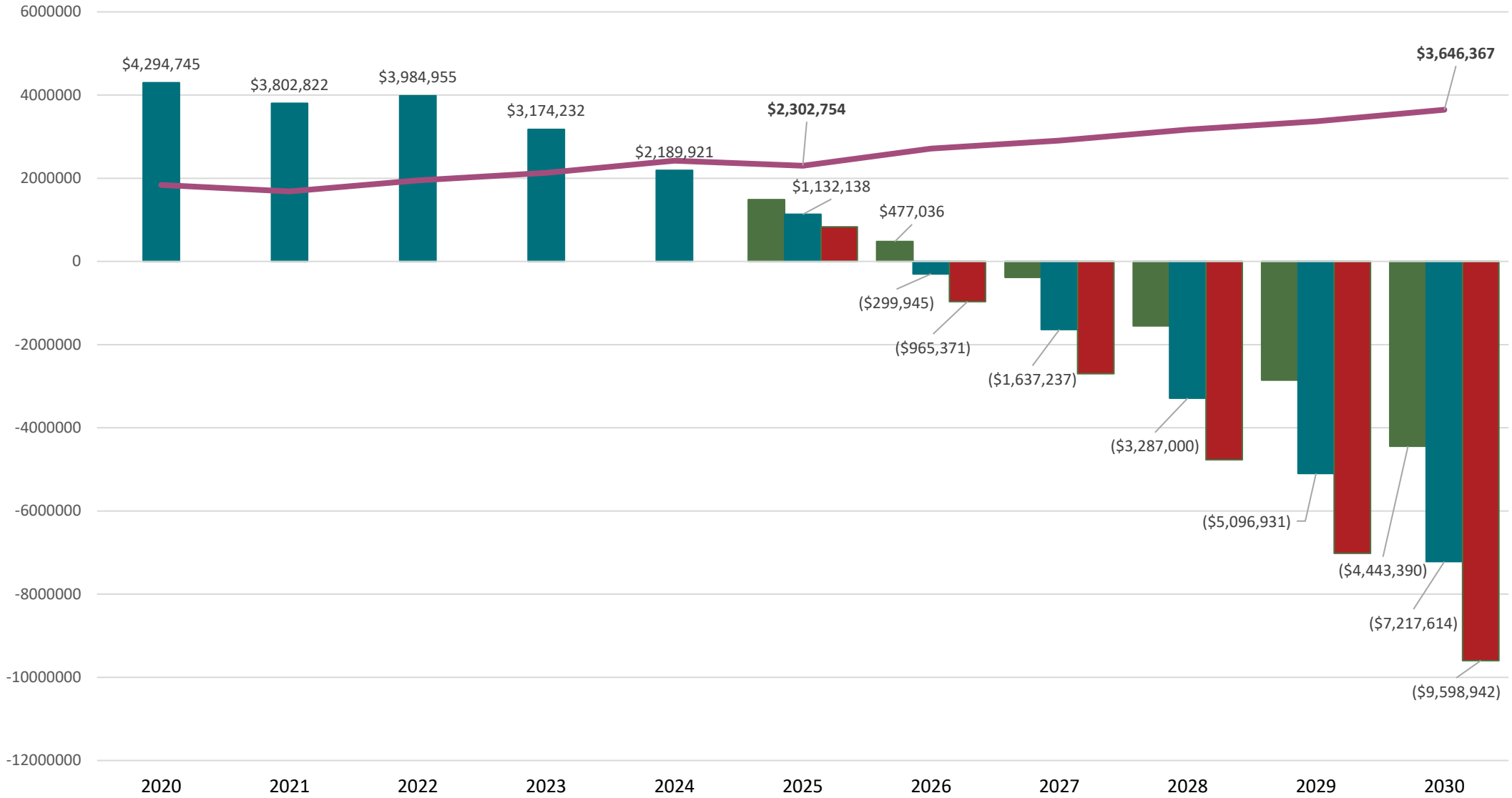


# Scenario Analysis

# Historical Revenues & FY25 Projected Range



## Historical & Projected Reserve Balance with 6-Month Minimum Reserve Target



■ Ending Fund Balance - Top of Range 
 ■ Ending Fund Balance - Middle of Range 
 ■ Ending Fund Balance - Bottom of Range 
 — 6-Month Min. Reserve Target





# Summary of Approaches

Cumulative Period Percentile Rank (2017 to Each Year)								
Period	2020	2021	2022	2023	2024	2025 - M	2025 - T	2025 - B
1	100%	25%	80%	33%	86%	63%	63%	63%
2	67%	75%	80%	83%	29%	100%	100%	100%
3	100%	100%	100%	67%	86%	0%	0%	0%
4	67%	0%	60%	50%	57%	88%	88%	88%
5	100%	75%	100%	83%	100%	75%	88%	38%
6	33%	0%	100%	100%	71%	50%	63%	50%
7	100%	25%	20%	100%	57%	63%	63%	50%
8	33%	75%	100%	83%	29%	38%	63%	38%
9	67%	100%	100%	50%	0%	38%	75%	0%
10	100%	100%	100%	0%	14%	38%	75%	38%
11	0%	100%	60%	67%	86%	75%	100%	50%
12	100%	0%	100%	67%	100%	88%	88%	88%

\*Multiple 100%'s indicate consistent record revenues each year in that period  
 \*M - Middle of Range, B - Bottom of Range, T -Top of Range

**“Ready, Set, Go”**

# CEDD “Ready, Set, Go” Observations

- Transitioning from “high-growth” to “typical growth” ranges - City metrics suggest a potential slowdown, with utility revenue forecasts under budget, lower-than-expected TAV growth, decelerating population growth, and reduced planning activity.
- Proactive plan to adjust resources or requirements - Prolonged revenue shortfalls and sharp drops in activity necessitate a plan, beyond personnel adjustments, to minimize customer service impacts and preserve the Fund’s health.
- Planning will be upside down by middle of FY26 - Increased activity, expense reductions, or subsidy is necessary.



# Ready, Set, Go – Current State: **Ready**

- **“Ready”** (High Frequency) – *Since 2020 triggered 18 out of 63 months (28%)*
  - Criteria: Any single month revenue that falls below the historical median for the same period.
- **“Set”** (Medium/Low Frequency) – *Since 2020 triggered 1 out of 63 months (1.5%) (April 2024)*
  - Criteria: 3 consecutive monthly revenues that fall below the historical median for the same period AND YoY Activity Drop  $\geq 20\%$ .
- **“Go”** (Very Low Frequency) – *Since 2020 triggered 0 out of 63 months (0%)*
  - Criteria: 4 consecutive monthly revenues that fall below the historical median for the same period AND YoY Activity Drop  $\geq 20\%$ .
- Within each “state”, action plans involve – hiring pauses (1, 3, 6 month), reallocation of staff, and determining GF support for reserve targets. If **“Go”** triggered, immediate action required.
- An equal number of monthly revenues above historical median are needed to resolve a “state”.



# Thank you for your time!

Questions or Feedback?



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